



Pérez Almansi, Bruno

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La conformación de la *estrategia empresarial* de una firma multinacional en la cadena de valor automotriz de un país *integrado periféricamente*. El particular caso de Toyota Argentina (2002-2019)

TESIS DOCTORAL

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Resumen

La presente tesis busca dilucidar los factores que explican la particularidad de Toyota en el mercado automotriz argentino. La misma está dada por su veloz ascenso luego de la crisis de la salida de la convertibilidad y durante la crisis económico-financiera de 2018 y 2019, sus superávits comerciales, el alto contenido local de sus vehículos y los lazos cooperativos con sus proveedores. El enfoque teórico del trabajo combina dos abordajes analíticos: el de Cadenas Globales de Valor a nivel de empresa y el estudio de su *estrategia empresarial* a través de la sociología económica en base a su *incrustación internacional y nacional*. Para ello se adopta una estrategia metodológica de estudio de caso a partir de métodos cualitativos y cuantitativos del relevamiento y análisis de datos.

Los principales resultados reflejan que gran parte de su estrategia se basó en la *incrustación internacional* de la filial a partir un plan a largo plazo que incluyó la sustentabilidad comercial de la firma y la expansión en mercados emergentes a través del proyecto IMV que permitió una estrategia innovadora de complementación productiva en el Mercosur y la inserción en un nicho del mercado en crecimiento. Sin embargo, esos elementos no son suficientes para explicar la estrategia de Toyota Argentina ya que en su *incrustación nacional* se encuentran otras claves de su desarrollo a partir de la creación de capacidades gerenciales locales.

En cuanto a la gestión de su cadena de valor se halla que Toyota incorporó mayor contenido local a sus vehículos que el promedio del sector en el país, llevando a cabo proyectos de localización y desarrollo de proveedores. Del total de sus autopartistas del primer anillo se encontraron tres grandes grupos. La mayoría de los proveedores eran de capitales locales, con los cuales se estableció una gobernanza *cautiva* y su *upgrading* fue mayormente *de procesos*, dedicándose a las actividades manufactureras más simples del conjunto

estudiado. Por el contrario, las sistemistas japonesas concentraban la producción de los bienes más complejos y mantenían vínculos de gobernanza *relacional*. Con los proveedores multinacionales no japoneses y los locales más grandes se hallaron vínculos de gobernanza *modular* y escasos procesos de escalamiento, con la excepción de Mirgor, la cual emprendió un *upgrading funcional e intersectorial* fabricando uno de los bienes de mayor valor de los vehículos Toyota.

Palabras clave: Toyota Argentina, Industria Automotriz, Estrategias Empresariales, Cadenas Globales de Valor, Empresas Multinacionales.



**LA CONFORMACIÓN DE LA *ESTRATEGIA EMPRESARIAL*
DE UNA FIRMA MULTINACIONAL EN LA CADENA DE
VALOR AUTOMOTRIZ DE UN PAÍS *INTEGRADO*
PERIFÉRICAMENTE. EL PARTICULAR CASO DE TOYOTA
ARGENTINA (2002-2019).**

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Autor: Mg. Bruno Perez Almansi

Director: Dr. Alejandro Gaggero

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AGRADECIMIENTOS

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Buenos Aires, 17 de mayo de 2023

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 5"/"Eqpvkpf q'ko r qtvcf q'f g'ru'xgj 'fawqu'pcekqpcrgu'.....464"
 6"/"Tgf 'uqekn'gi qe² pvtkec'f g'ru'pwxg'r tlpekr crgu'ceekqpkcu'f g'Vq{ qv'O qvqt"
 Eqtr qtcvkqp'.....469"
 7"/"Cp³ nkuku'f g'eqtg'rc'ekp'gptg'xctkeekqpgu'RD'Cti gpvkc'f 'xgpvcu'gp'gn'o gtecf q'kpvgtppq"
 f g'xgj 'fawqu'.....469"

ÍNDICE DE CUADROS, GRÁFICOS E IMÁGENES

Hki wtc"K3"ó" Fkci tco c" f g" r ecf gpc" i mdcn" f g" xcmq" t" cwqo qvtk" r qt" r c" f ugu" 66

I t^a hleq" K3" / " Rtqf week" p" { " xgpvcu" gp" gn" o gtecf q" kpvgtpq" f g" xgj " f wqu" * wplf cf gu" * glg" k s wktf q" + { " go r r gq" t gi kwtcf q" gp" gn" lugevt" t" cwqo qvtk" r tqo gf kqu" cpwrcgu" * glg" f gtgej q" + * 3 ; ; 8 / 423 ; + 2

I t^a hleq" K4" / " Rtqf week" p" f g" xgj " f wqu" * wplf cf gu" * glg" f gtgej q" + { " ucif q" eqo gteknf g" xgj " f wqu" { " cwqr ctvgu" * o kmppgu" f g" f » rctgu" * glg" k s wktf q" + * 3 ; ; 7 / 423 ; + 5

I t^a hleq" K5" / " Xgpvcu" gp" gn" o gtecf q" kpvgtpq" * ko r qtvcf qu" { " pcekpcrgu" { " gzr qtvcckppgu" f g" xgj " f wqu" * wplf cf gu" * 3 ; ; 9 / 423 ; + 7

I t^a hleq" K6" ó" Rtqf week" p" f g" xgj " f wqu" gp" Cti gpvkpc" r qt" vkr q" r qtegpvc lgu" * 3 ; ; 9 / 423 ; + 9

I t^a hleq" K7" / " Rtqf week" p" r qt" go r tgucu" f g" xgj " f wqu" wkrkctkqu" r xkcpqu" gp" Cti gpvkpc" * wplf cf gu" * 3 ; ; 9 / 423 ; + ;

I t^a hleq" K8" ó" Go r r gq" gp" gn" lugevt" vto kpcn" f g" r kpf wwtk" t" cwqo qvtk" f g" Cti gpvkpc" r tqo gf kqu" cpwrcgu" * 3 ; ; 9 / 423 ; + 2

I t^a hleq" K9" / " Xcmq" t" f g" xgj " f wqu" r tqf wekf qu" r qt" vto kpcn" t" cwqo qvtk" * o kmppgu" f g" f » rctgu" eqttkpgvgu" * 4224 / 423 ; + 3

I t^a hleq" K: " / " Rqtegpvc l g" f g" xgpvcu" f g" r u" vto kpcrgu" t" cwqo qvtk" lgu" uqdtg" r u" xgpvcu" f g" r u" 422" go r tgucu" o^a u" i tcpf gu" f g" Cti gpvkpc" r qtegpvc lgu" * 3 ; ; 9 / 423 ; + 4

Vcdre" K3" / " Rqulek" p" f g" Vq { qvc" gp" gn" tpcnki" f g" r u" 422" go r tgucu" o^a u" i tcpf gu" f g" Cti gpvkpc" * c^o qu" ugrgeekpfc qu" + 4

I t^a hleq" K; " / " Gzr qtvcckppgu" f g" vto kpcrgu" t" cwqo qvtk" lgu" * o kmppgu" f g" f » rctgu" HQD" + * 4224 / 423 ; + 5

Ewcf tq" K3" / " pf leg" K J " f g" eqpegpvtcek" p" f g" f gukpu" f g" gzr qtvcck" p" r qt" vto kpcn" t" cwqo qvtk" * 4224 / 423 ; + 6

I t^a hleq" K32" / " Ucf q" eqo gtekn" g" zvtgpq" r qt" vto kpcn" t" cwqo qvtk" * o kmppgu" f g" f » rctgu" , * 4224 / 423 ; + 7

I t^a hleq" K33" / " Eqpvplf q" ko r qtvcf q" f g" r u" xgj " f wqu" gp" Vq { qvc" { " r tqo gf kq" f gn" tguq" f g" r u" vto kpcrgu" f g" Cti gpvkpc" r qtegpvc lgu" * 4224 / 423 ; + 9

Hki wtc" K33" / " Fkci tco c" uqdtg" gn" o² vqf q" Vq { qvc" * The Toyota Way" + 82

Vcdre" K33" ó" Go r tgucu" f gn" I twr q" Vq { qvc, 34

Vcdre" K44" / " H dtlecu" f g" Vq { qvc" f g" pvtq" f g" Lcr » p 35

Vcdre" K45" / " Tc | ppgu" f g" r u" f gekukppgu" f g" tcf lecek" p" f g" hkrkrgu" f g" Vq { qvc" gp" f kkpvcu" r c" f ugu" f gn" o wplf q 33

I t^a hleq" K43" / " Rtqf week" p" cpwcn" f g" xgj " f wqu" f g" Vq { qvc" gp" Lcr » p" { " gp" gn" gzvtkqt" * o krgu" f g" wplf cf gu" * 3 ; ; 78 / 423 ; + 45

I t^a hleq" K44" / " Rtqf week" p" f g" xgj " f wqu" hwtc" f g" Lcr » p" r qt" tgi k" p" r qtegpvc lgu" * 3 ; ; 8 ; / 423 ; + 45

Vcdre"KKK6"/"Rtlpekrcrgu"ceekqpkrcu"fg"Vq{qvc"Oqvqt"Eqtrqtcvq"4242+(000000000000000000)B48
I t^a heq"KKK5"/"Tgf"fg"ceekqpkrcu"o c{qtkctkqu"fg"Vq{qvc"Oqvqt"Eqtrqtcvq"4242+(0000000000000000)B49
Vcdre"KKK7"/"Rtlpekrcrgu"dcugu"fg"r tqf weekp"fg"r tq{gevy"KO X(00000000000000000000000000)B52
Hki wt"KKK4"o"O cr c"fg"r"qti cpk celp"lpvtgpcckpcnf gnr tq{gevy"KO X(00000000000000000000000000)B55
I t^a heq"KKK6"/"Rtqf weekp"cpwcnf"fg"xgj "fwwqu"r qt"go r tgu"wpkf cf gu"4222/4239+(0000000000000000)B59
I t^a heq"KKK7"/"Ipi tguqu"cpwcnf"fg"ecf c"vto kpcncwqo qtk "o kmpgu"fg"»rtgu"3; ; 7/423; +(000)B5:
I t^a heq"KKK8"/"Xgpvcu"fg"fg"xgj "fwwqu"fg"Vq{qvc"gp"r tlpekrcrgu"tgi kppgu"{"rc"fu"wpkf cf gu"4229/423; +(000)B5;
I t^a heq"KKK9"/"Rtqf weekp"cewo wrc c"fg"Vq{qvc"r qt"rc"fu"gpvtg"4229"{"423; "wpkf cf gu, "62
I t^a heq"KK/3"/"Gur gekrc kelp"r tqf wekxc"fg"cwqo qvtegu"ugreekqpcfcu"gp"gn"ugi o gpvq"fg" xgj "fwwqu"hxkcpqu"r etc"rcu"hxkrgu"fg"Cti gpvpc"{"Dtcuki"co q"4224+(00000000000000000000000000000000)B69
I t^a heq"KK/4"/"Eqttgreekqpgu"gpvtg"rc"xctkeekp"fg"gn"RD"fg"Cti gpvpc"{"rc"r tqf weekp"fg" xgj "fwwqu"fg"vqf cu"rcu"go r tgu"gzegr vq"Vq{qvc"CE+"u"mq"Vq{qvc"DE+"3; ; /423; +; (0000000000000000)B6;
I t^a heq"KK/5"/"Eqttgreekqpgu"gpvtg"rc"xctkeekp"fg"gn"RD"fg"Co²tlek"Nc"vpc"gzegr vq"O²zleq+"{"rc"r tqf weekp"fg"fg" xgj "fwwqu"fg"vqf cu"rcu"go r tgu"gzegr vq"Vq{qvc"EE+"u"mq"Vq{qvc"FF+"3; ; /423; +; (00000000000000000000000000000000)B72
Vcdre"KK/3"/"Go r tgu"fg"gn"l twr q"Vq{qvc"gp"Cti gpvpc(00000000000000000000000000000000)B74
Vcdre"KK/4"/"O qf gqu"fg"Vq{qvc"J knz (00000000000000000000000000000000)B7:
K ci gp"KK/3"/"O qf gqu"fg"pgi qekq"fg"VCUC(00000000000000000000000000000000)B85
I t^a heq"KK/6"/"Gzr qtwekqpgu"r qt"fg"vkvq"{"xgpvcu"fg"fg" xgj "fwwqu"pcckqpcrgu"gp"gn"o gtecf q" kvtgtpq"fg"Vq{qvc"Cti gpvpc"wpkf cf gu"4224/423; +(00000000000000000000000000000000)B86
Vcdre"KK/5"/"O qf gqu"fg"r leniw"u"xi gpvqu"{"rc"fu"fg"r tqf weekp"4242+(000000000000000000)B89
Vcdre"KK/6"/"Ipxgtukqpgu"fg"VCUC"fg"»rtgu"eqttkpvqu"3; ; 9/423; +(00000000000000000000000000000000)B92
I t^a heq"KK/7"/"Tguwrcf qu"pgqu"fg"ecf c"gltelekq"fg"VCUC"{"uw"wkrc kelp"o krgu"fg"»rtgu"4224/423; +(00000000000000000000000000000000)B93
I t^a heq"KK/8"/"Rtlpekrcrgu"qr gtceekqpgu"fg"VCUC"eqp"VO E"eqo q"r qtgepvlg"fg"rcu"xgpvcu" vqrcgu"fg"ecf c"co q"r qtgepvlgu"4224/423; +(00000000000000000000000000000000)B93
I t^a heq"KK/9"/"Xgpvcu"fg"rcu"r tlpekrcrgu"r leniw"u"o gf kpcu"gp"Dtcuki"wpkf cf gu"4225/423; +(00000000000000000000000000000000)B95
I t^a heq"KK/:"/"Gzr qtwekqpgu"fg"Vq{qvc"Cti gpvpc"r qt"fg"vkvq"gzegr wcpf q"Dtcuki"o krgu"fg"fg"»rtgu"HQD"4224/423; +(00000000000000000000000000000000)B96
I t^a heq"KK/;"/"Xctkeekp"fg"cwqo »xkrgu"r tqf wekq"gp" Cti gpvpc"gpvtg"4233"{"423; " r qtgepvlgu(00000000000000000000000000000000)B98
I t^a heq"KK/32"/"Xctkeekp"fg"fg" xgj "fwwqu"eqo gtekrqu"hxkcpqu"r tqf wekq"gp" Cti gpvpc"gpvtg" 4233"{"423; " r qtgepvlgu(00000000000000000000000000000000)B99

Hli wtc "KX/3"/"F kci tco c" f g" nqu" r tlpekr crgu" hcevqtgu" f g" r" gutcvgi kc" go r tguclkn' f g" Vq{ qvc" Cti gpvkpc(2

Hli wtc "KX/4"/"Grgo gpvqu' f g' r' u' ecr cekf cf gu' i gtgpekrgu' f g" VCUC" c' r ctvk' f gn' 4232(3

I t^a hēq "X/3"/"Rtlpekr crgu' i twr qu' f g' r tqf wvqu' ko r qtwcf qu' *o krgu' f g' f » rctgu+ *glg' k' s wkgf q+ " " eqghlekpgv' f g' cwqr ctvgu' ko r qtwcf cu' r qt' xgj fēwq' r tqf wvkf q' f g" Vq{ qvc" Cti gpvkpc" *f » rctgu+ *glg' f gtgej q+ *4224/423; +(7

I t^a hēq "X/4"/"K r qtwcekppgu' f g' cwqr ctvgu' f g" Vq{ qvc" Cti gpvkpc' r qt' r tlpekr crgu' qt' f' gpgu' *o krgu' f g' f » rctgu+ *4224/423; +(9

Hli wtc "X/3"/"Rtlpekr crgu' i twr qu' f g' cwqr ctvgu' ko r qtwcf cu' r qt' qt' f' gpgu' *cewo wvf qu' gpt' g' 4224" { "423; +(9

I t^a hēq "X/5"/"Rtqxggf qtcu' cwqr ctvku' f gn' r tko gt' c' pkmq' f g" Vq{ qvc" Cti gpvkpc" ugi Àp' uw' r c' f' u' f g' qtki gp' *p? 73+ *4242+(6

Vcdre "X/3"/"Vkr qu' f g' i qdgtpep| c' f g" VCUC" eqp' r tqxggf qtgu' gpt' gxkvcf qu(444

Vcdre "2/3"/"Ercukhecek» p' f g' eqo r qpgpvgu' ugi Àp' a' tgc' f g' xgj fēwq(472

I t^a hēq "2/3"/"Rtqf week» p' f g' cwqo » xkrgu' r qt' go r tgucu' gp" Cti gpvkpc" *wplf cf gu+ *3; ; 9/423; +(473

I t^a hēq "2/4"/"Gzr qtwcekppgu' f g' xgj fēwqu' f g' r cuclgtqu' { 'eqo gtekrnu' f g' Cti gpvkpc" *wplf cf gu+ *3; ; 8/423; +(473

I t^a hēq "2/5"/"Go r rgg' gp' gn' lugevt' v' gto kpcn' f g' r' kpf wutkc' cwqo qtk' f g' Cti gpvkpc" *3; ; 9/423; +(474

Vcdre "2/4"/"Rqulek» p' f g" Vq{ qvc" gp' gn' t' c' p' n' k' p' i' f g' r' u' 422" go r tgucu' o' a' u' i' t' c' p' f' gu' f g' Cti gpvkpc (475

I t^a hēq "2/6"/"Rtqo gf lqu' f g' r' u' ko r qtwcekppgu' f g' cwqr ctvgu' uqdtg' xcmq' f g' r tqf week» p' gpt' g' 4224" { "423; *glg' [+ " r tqo gf lqu' f g' r' u' g' zr qtwcekppgu' v' c' r' u' uqdtg' gn' xcmq' f g' r' r tqf week» p' gpt' g' 4224" { "423; *glg' Z + " f g' wplf cf gu' r tqf wvkf cu' gpt' g' 4224" { "423; *co c° q' f g' r" dwt dwc+(476

I t^a hēq "2/7"/"K r qtwcekppgu' f g' xgj fēwqu' f g' r cuclgtqu' r qt' v' gto kpcn' cwqo qtk' *o kmpgu' f g' f » rctgu' EKH+ *4224/423; +(477

Vcdre " 2/5" /" Rtgu' f g' p' v' gu. " xlegr tgu' f g' p' v' gu" { " r tgu' f g' p' v' gu" f gn' f k' t' g' ev' q' t' k' q' f g" Vq{ qvc" O qvt" Eqtr qtwvkp(478

Hli wtc "2/3"/"O qf grq' f g" Vq{ qvc" 6R' f g' Nkngt' *4225+(479

Vcdre "2/6"/"Xgpvcu' f g" Vq{ qvc" Eqtqrnc' gp' gn' o' wplf q' *gp' wplf cf gu+(47

Vcdre "2/7"/"Egptqu' f g" K F' f g" Vq{ qvc" gp' gn' o' wplf q' *4242+(482

Vcdre "2/8"/"Ceekpkrku' f g" nqu' r tlpekr crgu' ceekpkrku' f g" Vq{ qvc" O qvt" Eqtr qtwvkp" *4242+(484

Vcdre "2/9"/"Rtqf week» p. " xgpvcu. " g' zr qtwcekppgu' g' ko r qtwcekppgu' f g' xgj fēwqu' gp' Uwf' a' h' k' c' r' qt' go r tgu' { " o' qf grq' *wplf cf gu+ *c° q' 423; +(488

Hki wtc'2/4'ó'Gutwewtc'eqtr qtcvxc'f'g'Vq{qvc'O qvqt'Eqtr qtcvxp'c° q'4225+(00000000000000000000000000)48:
I t^a heq'2/8/'Xgpvcu'cpwrcgu'f'g'Vq{qvc'gp'Lcr »p'{'gp'gn'gzvgtkqt '*gp'wplf cf gu+'*3; 97/4239+(00000000000000000000000000)48:
I t^a heq'2/9/'Tgpvcdkkf cf'f'gn'I t'w'q'Vq{qvc'*r qtegpvcigu+'*3; 92/4234+(000000000000000000000000)48;
I t^a heq'2/:'/'~'pf keg'f'g'tgrckp'f'g'tcdclq'gpvtg'vgtó kpcrgu'{'r tqxggf qt gu'gp'GGWW'f'g'Rrcpgv' O qtcv, (00000000000000000000000000)48;
Vcdr'2/:'/'Tcpcnpi 'f'g'Vq{qvc'gp'gn'tcpcnpi 'f'g'rcu'r tlpckr crgu'go r tgucu'o wmpckqpcrgu'f'gn' o wpl'q'r qt'kpi tguqu+'*3; ; 7/423; +(00000000000000000000000000)492
I t^a heq'2/;'/'Rtqf weekp'r qt'r c'ju'423; +*gp'wplf cf gu+, (00000000000000000000000000)493
I t^a heq'2/32/'/'Rtqf weekp'f'g'Vq{qvc'Cti gpvkc.'Dtcuki'{'Xgpgl wgr '*wplf cf gu+'*3; 7; /423; +(00000000000000000000000000)494
Vcdr'2/;'/'F kur qukekppu'kpukwekpcrgu'pcekpcrgu'{'tgi kpcrgu'wklk cf cu'r qt'Vq{qvc(0000)495
I t^a heq'2/33'ó'Kpegvxcqu'f'gn'i qdkgtpq'pcekpcn'et²f kqu'eqttkgpvgu+'eqo q'r qtegpvc'lg'f'g' xgpvcu'pgvcu'f'g'VCUC'gp'ecf c'c° q'r qtegpvcigu+'4224/423; +(00000000000000000000000000)498
Kó ci gp'2/3/'/'Rrcpvcu'f'g'r tqf weekp'{''egvqtqu'f'g'f kvtkdwckp'f'g'Vq{qvc'Cti gpvkc'{'Dtcuki'c° q' 423; +(00000000000000000000000000)499
Hki wtc'2/5'ó'Guecr'lg^a ts wlec'qr gtctkqu'VCUC (00000000000000000000000000)499
Hki wtc'2/6'ó'Guecr'lg^a ts wlec'r tqhgukqpcrgu'VCUC(00000000000000000000000000)49:
Vcdr'2/32'ó'O qf gmu'r tqf wkl'qu'r qt'ecf c'go r tgu'gp'Cti gpvkc'{'Dtcuki'gp'3; ; 9'(00000000)49;
I t^a heq'2/34/'/'Xcrqt'ci tgi cf q'f'g'rcu'cevkxf cf gu'f'g'ci tlewntc.'ec| c.'ukxlewnwtc.'r guec.' o kpgt'p'{'gpgti 'p'gp'Co ²tlec'Ncvkc'°o kmppgu'f'g'f »rtgu'eqttkgpvgu+'*3; ; : /423; +(000000000)4: 3
Vcdr'2/33/'/'O qf gmu'pcekpcrgu'{'tapi qu'f'g'r tgekqu'°o krqu'f'g'r guqu+'c° q'423; +(000000000)4: 4
I t^a heq'2/35/'/'Eqttgrcekppgu'gpvtg'xctkckp'f'gn'RKÓ'f'g'Cti gpvkc'{''xgpvcu'f'g'cwqo »xkrqu'gp' gn'o gtecf q'kpvtpp'f'g'vq'cu'rcu'go r tgucu'gzeqr vq'Vq{qvc'°C+{'u»m'Vq{qvc'°D+'*3; ; : /423; +(00000000000000000000000000)4: 5
I t^a heq'2/36/'/'Eqttgrcekppgu'gpvtg'xctkckp'f'gn'RKÓ'f'g'Cti gpvkc'{''xgpvcu'f'g'wklxctkqu'gp'gn' o gtecf q'kpvtpp'f'g'vq'cu'rcu'go r tgucu'gzeqr vq'Vq{qvc'°E+{'u»m'Vq{qvc'°F+'*3; ; : /423; +(00000000000000000000000000)4: 5
I t^a heq'2/37/'/'Xgpvcu'gp'gn'o gtecf q'kpvtpp'cti gpvqp'f'g'xgj 'ewqu'r qt'go r tgu'°wplf cf gu+'*3; ; 8/423; +(00000000000000000000000000)4: 6
I t^a heq'2/38'ó'Rctwckr celp'f'g'uwrq qu'{'lqtpcrgu'udt'g'xgpvcu'pgvcu'f'g'VCUC'f'g'ecf c'c° q' °r qtegpvcigu+'4224/423; +(00000000000000000000000000)4: 7
Vcdr'2/34/'/'Fktgexqu'f'g'VCUC'°3; ; 7/423; +(00000000000000000000000000)4: 8
Kó ci gp'2/4/'/'Wdkeckp'f'g'rcu'r rcpc'f'g'Vq{qvc'Cti gpvkc.'r wgtvq'Vgtó kpcn'\ ` tcvg'{'rcu' kpvgtugeekp'f'g'rcu'wcu'P cekpcrgu'; '{'34'(00000000000000000000000000)4; 2
I t^a heq'2/39/'/'Rtqf weekp'cpwcn'f'g'xgj 'ewqu'r qt'eqo r c° 'p'gp'Dtcuki'°wplf cf gu+'*3; 79/423; +(00000000000000000000000000)4; 3

LISTADO DE SIGLAS

CECTC/"Cuqekcel»p"fg"Eqpegukpctkqu"fg"Cwqo qvqtgu"fg"rc"Tr Àdrlec"Cti gpvpc"

CEG/"Cewgtf q"fg"Eqo r ngo gpvcel»p"Geqp»o lec"

CF GHC"ó"Cuqekcel»p"fg"Hcdtlecpvgu"fg"Cwqo qvqtgu"

CF IO TC/"Nc"Cuqekcel»p"fg"Kpf wutkrcu"O gvnÀti lequ"fg"rc"Tr Àdrlec"Cti gpvpc"

CGC"ó"Cuqekcel»p"Go r tguclc"Cti gpvpc"

CGE"ó"Ctxpegn"Gz vtpq"Eqo Àp"

CHCE"ó"Cuqekcel»p"fg"Hcdtlecpvgu"fg"Eqo r qpdpvgu"

CHK/"Cfo kputcel»p"Hgf gtcn"fg"Kpi tguq"RÀdrlequ"

CHVC/"Ctgc"qh"Hgg"Vtcf g"qh"UGCP "

CNCF K/"Cuqekcel»p"Ncvkqco gtlepc"fg"Kpvi tcel»p"

CNCNE/"Cuqekcel»p"Ncvkqco gtlepc"fg"Nldt"Eqo gtekq"

CRVC/"Cuqekcel»p"fg"Rtqxggf qtgu"fg"Vq{ qv"Cti gpvpc"

CUGCP/"Cuqekcvkp"qh"Uqwj gcuv"Cukcp"P cvkpu"

ECK/"E^a o ctc"fg"rc"Kpf wutk"fg"Cwqeqo r qpdpvgu"

ECP/"Eqo wplcf"Cpflpc"

EEE43/"Eqputweel»p"fg"Eququ"Eqo r gvkkqu"r ctc"gn"Uki m"ZZK"

EGRCN/"Eqo kul»p"Geqp»o lec"r ctc"Co²tlec"Ncvkpc"{ "gn"Extldg"

EI X"ó"Ecfcpcu"l mdcrcu"fg"Xcrqt"

EKCF K/"Egpvtq"Kpvtpcelqpcn"fg"Cttgi m"fg"Flgtgpekcu"tgrvxcu"Kpxgtukppgu"

EKH/"Equv"Kpwtcepg."cpf"Hlgi j v"Eququ."Ugi wtqu"{ "Vtcur qtvg+"}

EKCTC/"E^a o ctc"Kpf wutkcn"fg"Hcdtlecpvgu"fg"Cwqr kgl cu"

EMF/"Eqo r rvgu"Mpqem"F qy p"

EN"ó"Eqpvplq"Nqecn"

F KHC/"F kgeek»p"P celqpcn"fg"Hcdtlecel»p"fg"Kpxguki cel»p"Cgtqa wlec"

F LCK/"F gemtcelqpgu"lwtcf cu"Cpvlekr cf cu"fg"K r qtvel»p"

GE"ó"Guvcf qu"Egpvtcrqu"

GO"ó"Go r tgu"O wmpcelqpcn"

GO Kó"Guvo cf qt"O gpuwcn"Kpf wutkcn"

GR"ó"Guvcf q"Rgtkftleq"

HQD/"Hgg"qp"Dqctf "

HQPF GCT/"Hqpf q"r ctc"gn"Flgttqm"Geqp»o leq"Cti gpvpc"

I CVV/"I gpgtcn"Ci tggogpv"qp"Vctkhu"cpf "Vtcf g"

I O "I wgttc'O wpf kcn'
 KCO G/"Kpf wwtku'Cgtqp^a wlecu{"O ge^a plecu'f gn'Gucf q"
 K "Kpf wwtku'I wk k'
 KMC/"Kpf wwtku'Mckugt'Cti gpvkpc"
 KØ/"Kpgtpevkqpcn'Dwukpguu"
 K F "ó"Kpxgukl celøp{"F gucttqm"
 KFGC/"Kpukwwq'r ctc'gn'F gucttqm'Go r tguclcn'f g'rc'Cti gpvkpc"
 KGF "Kpxgtukøp'Gz vtcplgtc'F kgevc"
 KJ "pf keg'f g'J gthkpf cj n'g'J kuej o cp"
 KMC/"Kpf wwtku'Mckugt'Cti gpvkpc"
 KOG/"Kpf wwtku'O ge^a plecu'f gn'Gucf q"
 KOX/"Kpaxcwxg'Kpgtpevkqpcn'O wnk/r wtr qug'Xgj kerg"
 KXC/"K r wguq'cn'Xcmj'Ci tgi cf q"
 KXH"ó"pf keg'f g'Xqmo gp'Hjkeq"
 LX/"Lqkv'Xgpwtg"
 NPC"ó"Nlegpeku'P q'Cwqo^a wlecu"
 O GTEQUWT"ó'O gtecf q'Eqo À'f gn'Uwt"
 PUF"ó'P wxc'Uqekqmi ꞑ'f gn'F gucttqm"
 PUG"ó'P wxc'Uqekqmi ꞑ'Geqp»o lec"
 QEFG/"Qti cpk celøp'r ctc'rc'Eqqr gtceløp{"gn'F gucttqm'Geqp»o leq"
 QÆC/"Qti cpkucvq'Kpgtpevkqpcn'f gu'Eqputwegwtu'f)Cwqo qdkgu"
 QOE"ó'Qti cpk celøp'O wpf kcn'f gn'Ego gtekq"
 RCE"ó'Rqñ'lec'Cwqo qvtk'Ego À"
 RÆG"-Rtqi tco c'f g'Kvgi tceløp{"Eqqr gtceløp'Geqp»o lec"
 TCH"ó'T²i ko gp'f g'Cf wpc'gp'Hcevtꞑ"
 UG"ó'Uqekqmi ꞑ'Geqp»o lec"
 UO CVC/"Uqpf lecv'f g'O ge^a plequ{"Chkpgu'f gn'Vtcpur qtvg'Cwqo qvt"
 UWX/"Ur qt v'Wkk{"Xgj kerg"
 VCUC/"Vq{qc'Cti gpvkpc'Uqekgf cf' Cp»plo c"
 VF/"Vgqtꞑ'f g'rc'F gr gpf gpek"
 VFO/"Vgqtꞑ'f g'rc'F gr gpf gpek'O ctzkuc"
 VÆ/"Vgepqmi ꞑ'f g'Kphto celøp{"Eqo wpleceløp"
 VNE/"Vtcwf q'f g'Nkdtg'Ego gtekq"
 VNECP/"Vtcwf q'f g'Nkdtg'Ego gtekq'f g'Co²tlec'f gn'P qtvg"

VRU"/"Vq{ qv"Rtqf wevq "U{ ugo "
VO E"/"Vq{ qv"O qvqt"Eqtr qtcvq"
VO V"/"Vq{ qv"O qvqt"Vj ckcpf ""
VO O R"/"RV0Vq{ qv"O qvqt"O cpwlcwtkpi "Kpf qpguk"
VUCO "/"Vq{ qv"Uqwj "Chtec"O qvqtu"Rv{ 0"
WIC"ó"Wpkp"Kpf wutkriCti gpvpc"
WPEVCF "/"Wpkgf "P cvkqpu"Eqphgtgpeg"qp"Vtcf g"cpf "F gxgnr o gpv"
WQO "ó"Wpkp"Qdtgtc"O gvnÀi lec"
XDR"ó"Xcmq"Dtwq"fg"Rtqf weevq"

INTRODUCCIÓN

1 - Presentación del problema y estado de la cuestión

C'r ctvkt "f g"rc" f²ecf c" f g"3; ; 2"rcu" go r t gucu" f g" f kxkpvqu" r c" f ugu" vgp f kgtqp" c" vtcpuhgtk" cni wpcu" cevkxkf cf gu" f gn' r tqeguq" r tqf wekxq" j cekc" qvteu" go r t gucu" *out-source" + { "qvtqu" r c" f ugu" *offshore" + hqto cpf q'rcu" mco cf cu' cadenas globales de valor" *EI X+ *I gtghk'gv'cni" 4223. "4227-0" Nqu" vtdclqu" s wg" cpcrk ctqp" guvg" r tqeguq" uquwxkgtqp" s wg" rc" kpugetekp" f g" mqu" r c" f ugu" { "rcu" go r t gucu" gp" guvcu" ecf gpcu" i gpgtc" wpc" ugtkg" f g" gz vgtpcrkf cf gu" geqp» o kccu" { "uqekrgu" dgpghlekqucu" r etc" gmqu'0'Cu" f" guvqu" cwqtgu" r wgf gp" ci twr ctug" eqp" qvtqu" s wg" uquvkgp" s wg" mqu" ghgevu" f g" rc" tcf kecekp" f g" Go r t gucu" O wmkpcekqpcrgu" *GO u+ "gp" r c" f ugu" perifericos" tgegr vqtgu" *host country" + vkgp" eqpugewgpcku" r qukkxqu" r etc" mqu" Ànko qu" *Dcrf y kp. "4238=" F wppkpi " { " Nwpcf cp. "422: =I j cwtk' { "[co kp. "422; =O g{ gt. "4226=" Twi o cp. "422; +0Rqt" qvtq" rcf q. "gzkuvp" cwqtgu" s wg" f guvecp" mqu" ghgevu" pqekxqu" f g" guvcu" kpxgtukp" gu. r t kpek cm gpvg" f guf g"rcu" vgtq'cu" o ctzkxqu" f gnko r gtkerkuo q. ukungo c/o wpf q" f" rc" f gr gpf gpek" *Co kp' gv'cni" 3; ; 4=" Cttk j k" 3; ; 2=" F qu" Ucpvqu. "4233=" Hqwi pgt. "4228=" O ct kpk" 3; 95=" Y cmgtuvkpk. "3; ; : +0"

Rqt "hwgtc" f g" guvcu" xkukp" gu" o a u" r qrtk' cf cu" pwo gtququ" vtdclqu" go r f lequ" cttkdep" c" tguwncf qu' j gvtqi 2 pgqu' uqdtg' gnko r cevu" f g" rc" kpxgtukp" Gz vtcplgtc" F ktgevc" *KGF +. "uquvkgp" q" s wg" 2 uvg" f gr gpf g' f g' o Ànkr ngu' hcevqtgu. vcrnu' eqo q-rc' ecrkf cf { "gn'pkxgnf gn'ecr kcnj wo cpq' f gn' r c" f u' tgegr vqt" *Dgpi qc" { "Ucpej gl / Tqdrqu. "4225=" Nk" { "Nkw. "4227=" Uqmqo qp. "4233+." gn'f gucttqm" f gn' o gtecf q' hpcpekgtq" *Cnrtq" gv'cni" 4226=" F wj co . "4226+." rc" gz kuvpek" f g" vtcvf qu" f g' rndt g" eqo gtekq" * j cpi . "4223+." gn' vo c° q' f gn' o gtecf q' *Hcttgm' gv'cni" 4226=" Mw o ctk' { "Uj cto c. "4239+." rc" eqo r ngo gpvtkgf cf "gpvtg" rc" kpxgtukp" mceci" { "gz vtcplgtc" *Cm htclk" { "Cm uchkt. "4236+." rc" ecrkf cf "f g" rcu" kpuvkwekp" gu" f gn' r c" f u' tgegr vqt" *Dgpcp" gv'cni" 4226=" Gtf qi cp" { "Wpxgt. "4237+." rcu" r qn' kccu" kpf wutkrgu" *Dctpgu" gv'cni" 4243=" P cwuf c. "422; +." rc" ecrkf cf "f g" rc" kphcugtwewtc" *Dkuy cu. "4224=" Xkic { cmwo ct" gv'cni" 4232+." gn' eqvuq" f g" rc" o cpq' f g" qdte" *Dki k' gv'cni" 4234+." rcu" rgf gu' ko r qukkxqu" *Dkuy cu. "4224+." gn' lugevt" geqp» o leq' f g" rc" go r t guc' lwdulk kctk" *Cnrtq. "4225+." gpvtg" qvtcu" 0"

Gp' r ct vkwrt. "gn' ecuq" f g" rc" kpf wutk" cwqo qvtk' "ug" gpo ctec" gp' f lej c" f kuewukp" r qt" guvct" f qo kpcf c" r qt" i tcpf gu" GO u" gp" vqf q" gn' o wpf q'0' Cegtec" f g" guvc" ecf gpc gz kuv" o c { qt" eqpugpuq" uqdtg" mqu" ko r cevu" r qukkxqu" f g" rc" "KGF" gp" v to kpqu" f g" etgcekp" f g" go r r gq" { "ecr cekf cf "f g" r tqf weekp. "r gtq" j c { "o c { qt" f kuewukp" cegtec" f g" rc" vtcpuhgtgpek" f g" vgepqmi "c" { "know-how, mcecrk cekp" f g' r ctvgtu" { "r kgl cu" { "ghgevu" gp" gn' eqo gtekq" gz vgtkqt" f g" mqu" r c" f u' tgegr vqtgu" *Rctf k" 423; =Rcxn' f pgm" 4226=" Rcxn' f pgm" { "fi f' lcmx" a . "4238=" Y wwnng. "4243-0Cu" f" rc" tkvgtcwte" j c" ug° cncf q" s wg" mqu" ko r cevu" f g" rc" kpxgtukp" gz vtcplgtc" cwqo qvtk' f gr gpf gp" f g" mqu" eququ" f g' r tqf weekp"

f gn' r c¶u" *Mwo ctcuy co {" gv'cñ0" 4234+." r" r qñ¶lec" kpf wutkcn' {" gn' r qf gt" f g" pgi qekcek»p" *bergaining power+f gn'Guxcf q'tgegr vqt *Dctpgu'gv'cñ0"4243=Drcem'gv'cñ0"4242=P cuwf c."422; =P cuwf c" {"Vj qdwt p."4236+."rc"qdvgpek»p" f g"geqpqo ¶cu'f g"guecnc" *F qo c unk' {"I y quf | ."422; =J cuurt."4233="Uwi k{ co c" {"Hmlko qvq."4222+ {" rnu" gutcvgi kcu'f g"rcu"vgtō kpcrgu"cwqo qvtlegu." r tlpekrcm gpvg"rcu"xlpewrcf cu" c"ñqu"egpvtqu'f g" f lug° q" {"ñqecrk cek»p" f g" r ctvgu" *J wo r j tg {" Ucrtpq."4222="Mwo ctcuy co {" gv'cñ0"4234="Rctf k"423; =Ur kpf gpf tglgt" gv'cñ0"4237+0"

Rqt"qvtq"rcf q."uk'dlqg"gn'ugevqt"cwqo qvqt"vco dlē p"ug"lpvgi t»"i ñdcm gpvg"gp"rc" f² ecf c" f g"3; : 2." guvg"ñ" j k q" eqp"hwgtvgu"tcui qu'f g" guecnc" tgi kqpcñ" *Twi o cp" {"Eqñkpuqp." 4226=" Uwi gqp"gv'cñ0"422; +0Gp"Co ² tlec" f gn'Uwt"guvc"ñqto c"ug"xlq"gzr tgucf c." r tlpekrcm gpvg."gp"rc" Rqñ¶lec"Cwqo qvtk "Eqo Àp" *RCE+"gpvt g"Cti gpvpc" {"Dtcukñ'gp"gn'ō cteq" f gn'O gtequw" f wtcpvg" rc" f² ecf c" f g"3; ; 2" *Xkur q."3; ; ; +0Gp"Cti gpvpc."guvg"r tqeguq" f g" tgi kqpcrk cek»p"vgtō k»"eqp"rc" qti cpk cek»p"cwqo qvtk "gp"dcug" c"rc" kpf wutkcn' cek»p" r qt "Uwukwec»p" f g" kō r qtveckppgu" *KUK" {" i gpgt»" wpc" f gukpvgi tcek»p" f g" rc" kpf wutkc" ñecñ' s wg" chge»" r tqhwpc co gpvg" c" elgtvcu" r tqf weekppgu" *cwqr ctvgu. f vgtō kpcf cu'cevxxkf cf gu'b gvcñti kcu."gve0" {" c'f gvgto kpcf cu'ñto cu" *gp"gur gekcñ" c"rcu"ñqecrgu" f g" r gs wg° q" {" o gf kcpq" r qtvg+ *C| r k| w'gv'cñ0"4223="Uej xct| gt" gv'cñ0" 4225+0P q" qduwcpvg." gn'gurd»p" vgtō kpcñ'f gn'ugevqt"cwqo qvqt"pq"ug"xlq" r gtlwf kecf q" r qt"rcu" tghqto cu" gutwewtcrnu" f g" f lej c" f² ecf c. {" c' s wg"ug" dgpgñlek»" eqp" gn'ōT² i ko gp" Cwqo qvtk ö" f g" r tlpekrc kqu'f gn'f gegpkq" s wg"ñg" dtkpf »" wpc"ucñk c" gzr qtvcf qtc" ñt gpvg" c"rc" etkuku" f gn'ugevqt"gp"3; : 2" *Gvej go gpf {" .4223="Xkrcñp."3; ; ; +0Rqt"qvtq"rcf q." guvqu"eco dkqu"vco dlē p"ko r ñlectqp" wpc" o qf gtpk cek»p" f g"ñqu" r tqeguqu" r tqf wevxxqu" gp" gn'ugevqt" {" rc" ñgi cf c" f g" pwxcu" vgtō kpcrgu" cwqo qvtlegu." eqo q" gn'ecuq" f g" Vq { qc" *Dcuqu" Vki tg" gv'cñ0"3; ; ; =O qtgtq."4235="P qxlem'gv'cñ0" 4224d+0"

C"eqo kgp| qu'f gn'r tguvg"uki ñ" Cti gpvpc" cwtcxgu»" wpc" f g"rcu" etkuku" geqp»o kcu" {" uqekrcgu"o ³ u'ko r qtvcpgu" f g"uw"j kñqtkc." f cpf q"eqo kgp| q" cñr gt¶ñf q" f g"rc" *posconvertibilidad*0 Gp"guvc" Ññko c" gvcrc." gn'ugevqt"cwqo qvqt"wxq"wp"tqñr tgr qpf gtcpg" {" c' s wg"ñkf gt»" gn'let geko kgpvq" kpf wutkcn' f g" Cti gpvpc." o quwcpf q"wp"hwgtvg"tko q" f g" kpetgo gpvq"gp" gn'go r ñqg."rc" r tqf week»p" kpgtpe."rcu"gzr qtveckppgu" {" rc" r tqf wevxxkf cf *Dctrgwc" gv'cñ0"4235+." c"rc" xgl' s wg" f kñkpvqu"cevqtgu" kpxqñwctcf qu'gp"guvc" ñcf gpc"ñqto ctqp" r ctvg" f gn'ñ twr q" f g" go r tgucu" *ganadoras*³ f g" f lej q" r gt¶ñf q" *I ci i gtq" {" "Uej qtt."4238=" Ucpvcteª pi gñ" {" "Rgttqpg."4234+0P q" qduwcpvg." c" r guct" f g" guvg"

³" Gpvpf kf cu'eqo q"uw'cxcpes"gp"rc" r ctvekrc cek»p"gp"rc" gñk»"geqp»o lec." gu'f gek. "rcu"422" go r tgucu" f g" o c { qt" hewtcek»p"gp"gn'ō gtecf q"ñqecñ"gzegr wcpf q"rcu"ñkpcpeltcu+0Gp" f lej q" tgeqtkf q"ug"r wgf gp" gpeapvtct" c' f kñkpvqu" vgtō kpcrgu" cwqo qvtlegu" *Vq { qc." Xqmuy ci gp." Hqt f." Hcñ' Cwq." I gpgtci' O qvtu." Tgpcwñ." O gtegf gu" Dgp| ." Rgw gqvEktqgp." J qpf c+." kpf wutku"o gñ ñecu" dª ulecu" *Ukf gtct." Ukf gtec." Celpf ct." Cñwct+ª I ci i gtq" gv'cñ0"4236=" I ci i gtq" {" "Uej qtt."4238+ {" .gp" cñi wpqu" c° qu." wp" r w° cf q" f g" cwqr ctvecku" *Uecpkc." O ki qt." F epc." Hco ct+." cwps vg" gp" o gpgtgu" pñkrgu" s wg"ñqu" i twr qu'cpvgtkqtgu" *Ucpvcteª pi gñ" {" "Rgttqpg."4234-3: +0"

cwur lekquq" f gugo r g° q. " ug" f gpqvtcp" ugxgtcu" f kkwncf gu" r ctc" kpf wek" r" tgcwxccep" f g" gurcdqpc kpvqu" r tqf wekqu. " gxkf gpekf q" gp" rnu" o ctecf cu" f khtgpeku" gp" rnu" vcucu" f g" etgelo kpvq" f g" rnu" f kwpqu" uwdugevtgu" *Ecuvgmu" { " O cp| cpgrk" 4236+ " eqo q" gp" rnu" cnqu" plxgru" f g" f² hkw'eqo gtekn'c' r ctvk' f g' r' etgelgpv' ko r qtvccep" f g" cwqr ctvgu" *Ecpvtgnc" gv'crl" 4239+0F lej c" vgpf gpek" t gur p q f g. " gp" r ctvg. " c" r tqeguq" f g" tcpuhtto ccep" i mdcrgu. " gptg" rnu" swg" ug" gpewgptcp" r' hci o gpvccep" kpvtpcekqpcn' f g" rnu" r tqeguq" f g" r tqf wekcp. " r' vgpf gpek" j cec" r" f gulvgi tcep" xgtvccn' f g" rnu" i tcpf gu" hto cu" kpf wutkrqu. " r" pwgxc" f kxkcp" kpvtpcekqpcn' f gn' tcdclq" q" r' kvtqf wekcp" f g" pwgxcu" | qpcu" cn' eqo gtekq" o wpf kn' *Hki cpv" { " \ wo r g. " 4239=Rkpc| q. " 4237+0"

UK' dlqp" gn' f² hkw' eqo gtekn' f g" guvc" tco c" guv³ " r tguvgp" gp" qtqu" r c¶jgu. " rnu" r ctvkwctkf cf gu" f gn' eqo r rglq" cwqo qvt" cti gpvkp" gp" guvg" cur gev" t gucnpc" r qt" uw" vo c° q" tgrvqxq0' Guv" r wgf g" gxkf gpektug. " gp" r tko gt" nmi ct. " gp" dcug" c" rnu" f ko gpukppgu" f gn' f² hkw' ugevtkcn'tgi kwtcf q" gptg" 4224" { " 423; . " s wg" crecp| » egtec" f gn' 82' " f gn' uw" gtª xk' eqo gtekn' f gn' vcn' f g" r" geqqo ¶c" pcekqpcn' r ctc" gn' o kuo q" r gt¶qf q0' Gp" ugi wpf q" nmi ct. " guvg" f krgo c" cuwo g" o c { qt" ko r qtvcpek" cn' ci txcct" gn' j ku»tleq" r tqdrgo c" cti gpvkp" f g" *restricción externa* " r qt" hcn" f g" f kxkcu" *Dtcw" { " Lq { . " 3; 8: =F kco cpf . " 3; 95+0" Rqt" m" vcpvq. " guvg" r tqdrgo c" gu" f g" gur gekn' kpvgt² u' r ctc" gn' eucq" cti gpvkp0'

F cf q" guvg" f gugo r g° q" f gn' ugevq. " r" rkwgtcwtc" m'ecn' qht geg" f kwpvcu" gzi rkecekppgu" w" r tko gt" i twr q" f g" cwqtgu" *Dkn" 4237=Dkn' { " O wuuk" 4237=Dkn' { " Uctvgrk" 423: =Hk| uko qp" { " I wgxctc. " 4239=I tc° c" gv'crl" 4239+ " f guf g" wp" gphqs wg" o ctzkuc. " eqpukf gtc" s wg" r" ukwcep" f g" r" kpf wutlc" cwqo qvtk " gu" r tqf wev" f g" rnu" eqpf kekppgu" gut wewtcrqu" f gn' ðvctf ¶j0" ecr kcrkuo q" cti gpvkp" =qtqu" tcdclqu" gphc" vk cp" gn' t qn' f g" ðgpenxgö" f g" guvc" tco c" kpf wutkn' gp" gn' c¶u" c' r ctvk" f g" rnu" eco dkqu" r tqf wekqu" i mdcrgu" f g" 3; : 2. " gp" gn' ewcn' gn' ecr kn' t cupcekqpcn' cr tqxgej c" gn' dclq" equvq" f g' r' b cpq" f g' qdte" h'ecn' *Rkpc| q. " 4237=Rkpc| q" gv'crl" 423; + " qtq" eqplwpvq" f g' cwqtgu"

4" Gp" Cti gpvkp" guvc" j c" ukf q" wpc" rko kcep" j ku»tlec" cn' f gucttqm" gp" vcpvq" gn' plxgn' f g" cevkkf cf " { " rnu" vcucu" f g" etgelo kpvq" geqqo leq" ug" j cp" xkuv" tguvtpi kf cu" r qt" r" f kur qpdkrkf cf " f g" f kxkcu" *Uej qtt" { " Y clpgt. " 4236+0Gu" f gek. " s wg" gp" gvr cu" f g" etgelo kpvq" kpf wutkn' ug" i gptcp" ðewgmqu" f g" dqvgrcö" gp" r' f kur qpdkrkf cf " f g" f kxkcu" s wg" f hkwncp' cxcpl' ct' j cec' r tqeguq" f g" tcpuhtto ccep" { ' eqo r rglk ccep' r tqf wekxc' f gn' ugevq" 0Nqu' r tko gtqu' ðewgmqu" f g' dqvgrcö" gp" gn' ugevq" gz vtpq" s wg' xkxk' gn' c¶u' tgo kvg' c' r' f² ecf c' f g' 3; 52' { ' ug' j keltqp" b cpkkguq" gp' f khtgpvqu" o qo gpvqu" f gn' o qf gm" f g" uwkwcep" f g" lo r qtvccekppgu' Gn' etgelo kpvq" gz vgpukxq" { . " uqdtg" vqf q. " kpvgpukxq" f g" r" kpf wutlc" f gr gpf ¶c' f g' r' ko r qtvccep" f g' dlqpgu" f g' ecr kn' g' lpuwo qu' kpvto gf lqu. " r gtq" rnu" f kxkcu" pgeuctku' r ctc" hpcpekt' f lej qu' tgs wgtlo kpvqu' r tqxgp ¶cp' hwpf co gpvcro gpvg' f g' rnu" gzi r qtvccekppgu" f gn' ugevq" ci tqr gewctkq. " ew { c" qhtvc. " gur gekro gpvg" r" ci t¶eqr. " ug" gpeqptcdc" xk' wcm gpvg" guvpecf c0' C" plxgn' vgtleq. " rnu" r tqdrgo cu" f g" tguvkelep" gz vtpc' hwtgqp" cdqf cf qu' gp" Co ² tlec" Ncvpc' r qt" rnu' eqtt kpvqu" gut wewtcrku" { " f gr gpf gpvkcu" j cec" o gf kcf qu' f gn' i q' r' cucf q. " gpv' g' rnu" r tko gtqu' guwf lqu' s wg' tgrcekqpcn' gp" r tqdrgo " vlec" eqp" gn' eqo r qtvo kpvq" gtª vlec" f g' r' geqqo ¶c' cti gpvkp" ug" gpewgptcp" rnu" tcdclqu" hwpf cekqpcrgu" Dtcw" { " Lq { " 3; 8: + { ' F kco cpf " 3; 95+0 Nwgi q. " Vj kny cni" 3; 9; + hqto cik » " guvg" r tqeguq" r ncpvgpf q" s wg" r' vuc" f g" etgelo kpvq" tgs wgtkf c' r ctc" crecp| ct' gn' r rnpq" go r riq" ug" gpewgptc" r qt" gpeko c' f g' cs wgrc" eqo r cvdrg" eqp" gn' gs wkdtkq" gz vtpq0' Guvg" r tqdrgo c" j c" ukf q" egpvtcn' h' rcti q' f g' r' j kvqtk" geqqo lec' cti gpvkp. " tgr tguvgwpcf q" wpc" f g' rnu' r tpek crgu' tcdcu' r ctc" r' eqpetgekcp" f g' r tqeguq" f g' f gucttqm" geqqo leq0'

eqkpekf gp'gp'ug° crnt'rcu'iko kcekqpgu's wg'hg'ko r tko gp'cnleqo r nglq'cwqo qvqt'uw'r gs wg° c'gucrc' nqecn' { "rcu'gucucu" ecr cekf cf gu' vgepqn>i kecu'f gn'cwqr ctvkuo q"nqecn'cwps wg'f hktgp"gp"rc' ko r qukdrlkf cf 'f'g'o qf hkect'f lej c'ukwcek»p'dclq'gn'ukugo c'ecr kcrkuc.'r rcpvgepf q'o^a ti gpgu'f g' ceek»p"gp"guvc'f k'geek»p"*Ct| c' { "Nqr gl ."422: =Dctwl'gv'crf0"4239=O qwc'gv'crf0"4229=Rcpki q' gv'crf0"4239+0'

C'uw'xgl .'ug'j c'ug° crnf q's wg'rcu'ectcevtg'f'vkecu'f gn'ugevqt'gp'gn'r c'f'u'gu'p't'g'rekqpcf cu' eqp"rc'hwgtv'f gr gpf gpek' { "uwdqtf kpeck»p'f g'rcu'cwqr ctvkuo c'rcu'go r tgucu'vgtō kpcrgu.'rcu' ewcrgu'ug'eqpukw'f gp'eqo q'rcu'fff gtgu'f g'rc'ecf gpc'f g'r tqf week»p'cwqo qvqt' *Ecpvctgmc'gv'crf0" 422: =P qxlen'gv'crf0"4224=Rcpki q.'Ncxctgmj.'gv'crf0"4239+0Qvtq'eqplwpvq'f g'v'cdclqu'f gucec'rc' hqto c'f g'kpugtek»p'f g'Cti gpvkc'gp'gn'O gtequw' { 'rcu'f kur ctkf cf gu'eqp'Dtcukl'eqo q'v'c'f g'rcu' ecwacu's wg'eqphki wtcp'nqu'r tqdrgo cu'f gn'eqo r nglq'gp'uw'eqplwpvq' { 'f'g'rc'tco c'cwqr ctvkuo'gp' gur gekn'*F'K'O ct| q'Dtqi i k' { "O qrf qxcp."4239=I^a ttk' "gv'crf0"4236=I qpl^a rgl' { "O cp| cpgrnk" 4234+0C'uw'xgl .'f'kukpvqu'c'wqtgu'r rcpvgtqp'rc'gucuc'xqmwv'cf'q'kphgevxkf cf 'f'g'rcu'f qdktppqu' nktej pgtkucur'qt'tgxgtv'rc'j gtgpek'f'g'rc'f²ecf c'f'g'3; ; 2*Ecpvctgmc'gv'crf0"4239=Ecpvctgmc' gv'crf0"422: =Ecuvgm' { "O cp| cpgrnk"4236=I^a ttk' "gv'crf0"4236=I qpl^a rgl' { "O cp| cpgrnk"4234=R²tgl' Ct'lec.'423; =Uej qtt' { "Ecuvgm.'4237+0"

C'r ctvkt'f'g'rc'xlevqtk'f'g'O cetk'gp'Cti gpvkc' { "f'g'Dqmqpctq"gp'Dtcukl'nqu'r c'f'gu' r tqf vevqtgu'f'g'xgj'f'w'rcu'f'gn'O gtequw'cvtcxguctqp'wpc'ugtk'f'g'eco dkqu's wg'ko r rkectqp'wp' i kq'j cek'rc'cr gtwtc' { "rc'rdgtcrk' cek»p'f'g'uwu'geppqo' f'cu' { "rc'eqpvceek»p'f'g'uwu'o gtecf qu' kpvgtppu"*Y klpgt' { "Dgmppk"4239+0Gp'^vto kpu'i gpgtcrgu.'rc'pwgxc'g'zr g'kpekc'pgqrkdgtcr'gp' Cti gpvkc'uki p'k'le»'wp'ko r qtvcpv'gtgtqeguq'c'pkxgn'lpf wutkcn'*Ucpvct^a pi gmj'gv'crf0"423; +0Gp' ewcpvq'cn'ugevqt'cwqo qvqt.'ug'cegppwctqp'nqu'r tqdrgo cu'eqo gtekrngu'f'g'rc'tco c.'c'rc'xgl 's wg' ug'r gtf'kgtqp'cri wpcu'ectcevtg'f'vkecu'xkt wqucu'f'gn'elemj'cpvgtkqt.'eqo q'gn'pkxgn'f'g'r tqf week»p' f'g'xgj' f'w'rcu'nqecrgu' { "gn'go r ngl'ugevqt'kcn'*Rgt gl' C'm cpuk'4244+0"

P q'qduwcpvg.'c'r guct'f'g'guc'u'v'gpf gpekcu'gutwewtcrgu' { "eq { w'w'crgu.'rc'hktō c'Vq { qvc' Cti gpvkc'mi t>>'wp'i tcp'f'gugo r g° q'geqp>>o leq. { c's wg'gucrc'f'gn'f²r vko q'nwi ct'gp'gn'c'p'ncpi' f'g'hktō cu'ugi'Ap'pkxgrgu'f'g'r tqf week»p'gp'uwu'k'pekqu'gp"3; ; 9"cn'r tko gt'nwi ct'gp"423; ." eqmcepf q'uw'r tkpek crlr tqf vevq.'rc'eco kqpgvc'r leniwr "Vq { qvc'J knwz.'eqo q'gn'fff gt'f'gnb gtecf q' nqecn' { "o glqtcpf q'uw'r qukek»p't'g'rc'vxc'f'g'pvtq'f'g'rc'e'Ar wrc'go r tguctkcn'cti gpvkc'0"C'uw'xgl .' cf go^a u'f'g'guvqu'pqvqt'kqu'tguwv'cf qu'r qukxkqu."gp'mqu'o gf'kqu'f'g'eqo wplecek»p' { "a o dkqu' go r tguctkcrngu'ug'v'cpuo kg's wg'guvc'go r tguc'gu'rc'À'plec'eqo gtekrm gpv'uw'gtcxkctk'*gp'wp"

⁵Gp'423; .Vq { qvc'ug'v'kle>>'vgtgtq'gp'gn'c'p'ncpi' f'g'rcu'go r tgucu'o^a u'i tcpf gu'f'gn'r c'f'u'f'g'Tgxkrc'O gtecf q.'w'm' f'gdclq'f'g'rcu'guvc'rgu'f' ceko kgpvqu'Rgvtq'f'gtqu'H'uecrgu'f' RH' { 'Dcpeq'P cek»p'f'g'Cti gpvkc'*DPC+0'

ugevqt" uwo co gpvg" f g h l e k c t k q + " r c " s w g " g z r q t v c " c " o c { q t " e c p v k f c f " f g " f g u k p q u . " r c " s w g " o ^a u " r t q x g g f q t g u " h e c n g u " l p v g i t c . " { " r c " s w g " e q p u w t w { g ' o ^a u " r c | q u " e q q r g t c v k x q u " e q p " f l e j q u " r t q x g g f q t g u " * E r c t " p . " 3 B 1 4 2 3 ; = G n E t q p k u c . " 3 6 B 2 1 4 2 4 3 = K R t q h g u k p c n " 3 8 B 1 4 2 3 : = L w c p " E c p v c t g m c . " g p t g x k u c " r g t u q p c n " 5 1 7 1 4 2 3 ; + 0 G u c u " e c t c e v g t " f u k e c u " h g " e q p h k g t g p " w p c " r c t v k e w r c t k f c f " g p " g n l u g e v q t " c w q o q v q t " c t i g p v k p q . " h q i t c p f q " t g u w n c f q u " s w g " u w r g t c p " f k h l e w n c f g u " g u t w e w t c r g u " f g " r c " k p f w u t k c " c w q o q v k k " g p " g n l c " f u 0 C " r g u c t " f g " g m q . " u q p " g u e c u q u " h q u " g u w f k q u " f g " e c u q " c e c f ² o l e q u " u q d t g " f l e j c " g z r g t k g p e k " w p v q " g p " C t i g p v k p c " e q o q " g p " C o ² t l e c " N c v k p c 0 "

C " p k x g n i m d c n " g n l e c u q " f g " V q { q v c " h w g " g z v g p u c o g p v g " g u w f k e f q " g p " r c u " f ² e c f c u " f g " 3 ; 9 2 " { " 3 ; : 2 " g p " g n i b c t e q " f g " r c " k p t q f w e e k o p " f g " r c " h q t o c " f g " r t q f w e e k o p " f l e x i b l e , w o d k p " e q p q e k f c " e q o q " t o y o t i s m o , q j u s t - i n - t i m e , s w g " u w u k s w { > " c n i b ² v q f q " h q t f k u c " c p v g t k q t " * D q { g t " { " H t g { u g p g v . " 4 2 2 4 = E q t k v . " 4 2 2 2 = F q j u g " g v " c r l " 3 ; : 7 = N k n g t . " 4 2 2 5 = N k n g t " { " J q u g w u . " 4 2 2 : = Q j p q . " 3 ; : : = U j k o k w . " 3 ; ; ; = U r g e t " { " D q y g p . " 3 ; ; ; + 0 " Q t q u " v t c d c l q u " j c p " f g u c e c f q " r c " r c t v k e w r c t k f c f " f g " r c " g u t c v g i k c " g o r t g u c t k n f g " V q { q v c " g p " t g n e k o p " c " u w u " q d l g v k x q u " f g " r c t i q " r c | q " f g " r c " g o r t g u c " * N k n g t " { " O g k g t . " 4 2 2 8 = O e O k m c p . " 4 2 3 ; = U q u p q x u n k n j . " 4 2 3 8 = V c n g w e j k " 4 2 2 ; + 0 F g p v q " f g " g u c " x k u k o p " e q t r q t c v k x c " u g " f g u c e c p " r c u " t g n e k o p p g u " f g " r c t i q " r c | q " { " e q q r g t c e k o p " e q p " u w u " t g f g u " f g " r t q x g g f q t g u " { " u w " r t g h t g p e k " r q t " r c " e c r k f c f " u q d t g " r c " t g f w e e k o p " f g " r t g e k q u " * F { g t " { " P q d g q m c . " 4 2 2 2 = J g l o . " 4 2 3 5 = J g r r g t " { " J g p f g t u q p . " 4 2 3 6 = K g t " g v " c r l " 4 2 3 3 = O c i g g . " 4 2 2 9 = O e O k m c p . " 4 2 3 ; = V c n g w e j K " J 0 " 4 2 2 ; + 0 " Q t q u " g u w f k q u " u g " g p h q e c t q p " g p " r c " g u t c v g i k c " i m d c n " f g " r c " g o r t g u c " g p " g n l u k i m j " Z Z K * E j q y f j w t { . " 4 2 3 6 = J g l o . " 4 2 4 2 = R c t f k " 4 2 3 ; = U j k o k w " 4 2 2 ; c + 0 "

U q d t g " r c u " v t c { g e v q t k u " f g " r c u " h k c n g u " f g " V q { q v c " h w g t c " f g " L e r > p " g z k u g " w p " e q p l w p v q " f g " v t c d c l q u " s w g " c p e r k c " u w " t q n " g p " m q u " r c " f u g u " f g " r c " c u e k e k e o p " f g " p c e k q p g u " f g n l u w f g u v g " c u k ^a v l e q " * A s s o c i a t i o n o f S o u t h e a s t A s i a n N a t i o n s , " C U G C P + 0 " C r i " t g u r g e v q . " m q u " c w q t g u " f g u c e c p " w p " f g u c t t q m j " x k t w q u q " f g " u w u " t c o c u " c w q o q v t l e g u " c " r c t v t " f g " r c " l o r n g o g p v e e k o p " f g " f g v g t o k p c f c u " r q n l e c u " l p f w u t k r g u " { " r c " c t v k e w r c e k o p " e q p " G O u " l e r q p g u c u " * F q p g t . " 3 ; ; 3 = F q p g t " { " Y c f . " 4 2 3 6 = P c w u f c " { " V j q d w t p . " 4 2 4 2 = V j q d w t p " { " P c w u f c . " 4 2 3 : + 0 " G p " g u r g e k n " g u v q " u g " j c " u g ^o c r c f q " e q p " ² p h c u k i " r c t c " g n l e c u q " f g " V c k r c p f k c . " f q p f g " V q { q v c " r q u g g " w p c " r t g u g p e k " r t g r q p f g t c p v g " * C t p q r f . " 4 2 2 8 = K q j " g v " c r l " 4 2 3 : = M c y c d g . " 4 2 3 5 = R g v k u q p " { " L a j t k " 4 2 2 8 + 0 " Q t q u " c w q t g u " u g " j c p " g p h q e c f q " g p " r c " e w g u k o p " r c d q t c n f g " V q { q v c " g p " m q u " r c " f u g u " f g " C U G C P " * H w o k q . " 4 2 2 8 = J c t w e j k " 4 2 2 8 + 0 "

Q t q " e c u q " a p r i o r i " t g r g x c p v g " r c t c " C t i g p v k p c . " f c f c u " r c u " u k o k r k w f g u " g p " r c " g u r g e k r k c e k o p " r t q f w e v k x c . " ⁶ g u " g n l f g " V q { q v c " U w f ^a h l e c 0 " G p " g u g " u g p v k f q . " g z k u g p " v t c d c l q u " s w g " c p e r k c p " m q u " f g u g o r g ^o q u " { " g u t c v g i k c u " f g " r c u " f k u k p c u " v g t o k p c n g u " g p " U w f ^a h l e c " c " k p l e k q u " f g " u k i m j " { " m q u " t g u w n c f q u " r c t c " V q { q v c " g p " e q o g t e k q " g z v g t k q t " u q p " p q w d n g o g p v g " f k u k p v u " c " m q u " f g " C t i g p v k p c "

⁶ V q { q v c " U w f ^a h l e c " r t q f w e g " r c " r k e n i w r " J k n w z " f g u f g " r c " f ² e c f c " f g " 3 ; 9 2 0 "

*Drcem'422; +0C wps wg'qvtqu'ctv⁷ewwqu'uquvkgpgp's wg'guc'f kp^a o lec'ug'tgxlk^o '{ 'hc'vtc { gevqtk'f g' r^e'hko c'hwg'o w{ "gzkquc"gp"mqu'c° qu'uki wkgpvgu"*Drcem"4233=Nco r tgej v.'422; =Rj gmq"gv'cr0" 4239+0'

Gp'Co² tlec'Nc^o kpc'pq'cdwpc'p'mu'vcdclqu'uqdtg'Vq { qvc0Gp'O² zleq. 'wp'rdtq'tgekgpvg' f g'I^a o gu' { "Qrkgtc'Ci wkrct"*4242+'tgeqputw{ g'rc'vtc { gevqtk'f g'Vq { qf c'gp'O² zleq'f wtcpvg'rc' f²ecf c'f g'3; 72"ewcpf q"rc"go r tgue'ug'f gf le»"c"rc'r tqf week»p'f g'dkgpgu'f g'ecr kcn'r ctc"rc" r tqf week»p'vz^okr0Gp'Dtcukn'cni wpqu'cwqtgu'guwf kcp'gn'ecua'f g'Vq { qvc'eqp'gur gekcn'cvpke»p" gp'uwu'hwpkqpgu'f g'f kug° q' { "vcpuhgt gpekc'vgepqn>i lec"*Ectxcnj q.'4227=Eaquqpk' { "S wcf tqu." 4226=EQuvc.'422: =Kiwuwnk'gv'cr0"4237+0Gp'Cti gpvkc.'rc'o c { qt^olc'f g'mqu'ctv⁷ewwqu'uqdtg'f lej c" go r tgue'tghgtgp'cnio² vqf q'f g'r tqf week»p'vq { qv^olc' { .r tkpek^r cm gpvg.'c'mu'r tqeguqu'f g'vcdclq" gp'guwu'r rcpwu'*f rctg| 'P gy o cp.'4239=f rctg| 'P gy o cp.'4234=Dcwkukpk'4223=F qrgpumf . " 4234=O gf kpc'Hg { gt.'423: =Ucpq' { 'F KO ctv^okpq.'4225+0'Wp'vcdclq'tgekgpvg'gzco kpc'rc'tgmek»p" f g'Vq { qvc'Cti gpvkc"Uqekgf cf "Cp»plo c"*VCUC+'eqp'gn'Ukpf kcvq'f g'O ge^a plequ' { "Chkpgu'f gn' Vtcur qtvg"Cwqo qvt"*UO CVC+'gp'mu'Anko qu'c° qu"*Vco c { q.'4243+0'Nwgi q.'qvtq'ctv⁷ewwqu' cpcrk c'rc'r tqf wev^oklf cf "f g'Vq { qvc'Cti gpvkc'f wtcpvg'rc'r tlo gtc'f²ecf c'f gn'uki m'uquvplkpf q" s wg'gzkug'wpc'f hgt gpekc'eqp'rc'f g'mu'r c^ofuju'egpvtcgu'r gtq"s wg'rc'o luo c'gu'ecf c'xg| 'o gpqt" *O cksq.'4239+0'Nwgi q.'gzkugp'qvtqu'o^a u'gur ge^ohequ'uqdtg'gn'r rcp'f g'pgi qekqu'f g'rc'f kxkuk»p'f g' cwqrgxcf qtgu'f g'Vq { qvc'Cti gpvkc"*P qxgkq. "423; +.gn'ugt xlekq" f g'*car-sharing* *Dcn cpq." 423; +. rc'tgur qpucdkkf cf "uqekn'go r tguetk"*Tqf cu'I qp|^a ng| . "4242+ { "rc'f kxkuk»p'hkpcpekgtc" *Ctpcw f q.'4234+0'

Rqt'qvtq'rcf q.'cpvgeg f gpvgu'f g'lo r qtvcpek'r ctc'guc'vguku'm'tgcnk cp'Hg { uugpv³; ; : + 'cn' gzco kpc't" gn'r tqeguq" f g'kpucrcel»p" f g'Vq { qvc" gp" Cti gpvkc."Tco c" *4226+" cn' cpcrk ct" gzj cwv^olc gpvg'mu'o gecpluo qu'f g'uggeek»p."eqqt f kpekc»p" { "f gucttqm'f g'r tqxggf qtgu'f g' Vq { qvc'Cti gpvkc" { "Twdkq'gv'cr0"*4244+'cn'guwf kct'gn'f gucttqm'f g'wpc'r tqxggf qtc'f g'VCUC." Kpf wutku'I wfk' { "uw'gur gekcn'x^opewq'eqp'rc'vgt o kpcn'lcr qpuc0Cf go^a u.'gn'vcdclq'f g'Ct| c" { " Nqr gl " *422: +. "uk' dlgp" pq" guv^a " gphqecf q" gp" gn' ecua' f g' Vq { qvc." vkgpg" wp" i tcp" plxgn' f g' f guci tgi cek»p." r qt" m'ewcn'tgcnk c" cr qtvgu" kpvgtgucpvgu'r ctc" gzco kpc't" rc'vtc { gevqtk'f g'rc" go r tgue'mu'r tlo gtqu'c° qu'f gn'uki m0"

C"r ctvt'f g'm' g'zr wguvq."ug'r rcpvgc'gn'qdlgkxq"i gpgtcn'f g'guc'vguku's wg'eqpukvg"gp" cpcrk ct'rcu'ectcevt^ol^olcu' { 'mqu'hcevtgu's wg'g'zr rkecp'rc'qti cplk'cek»p" { 'rc'i guk»p'f g'rc'ecf gpc"

⁷Gri^octv⁷ewwqu'f g'P qxkkn'gv'cr0"*4224+'vco dl^op'ug'egpvtc'gp'gn'cur gevq'rdqtcn'f g'Vq { qvc'Cti gpvkc'r gtq'cdctec'qvtqu' vgo cu'eqo q"rc"guv^olc'f g'rc"go r tgue'gp'gn'o qo gpvq'f g'uw'kpucrcel»p" { "gn'cp^a ruku'f g'uw'x^opewq'eqp'mu' r tqxggf qtgu'eqo r ctef q'eqp'rc'hko c'Xqmuy ci gp'Cti gpvkc"r ctvt'f g'rc'etgcel»p'f g'wp'p^olfeg'f g'gzco gp'f g' vco cu'r tqf wev^olcu0"

f g'xcmqt'f g'rc' hklcn'cti gpvpc'f g'Vq{ qvc'O qvqt'Eqtr qtcvqp' *VO E+'{ 'uw'bo glqt'f gugo r g° q'gp' eqo r ctcek»p'eqp'grtguq'f g'rcu'vgo kpcrgu'cwqo qvlegu'tcf kecf cu'gp'grt c'f'u'gpvt'g'4224'{'423; 0' Ncu'j kr »vguku'kplekrgu's wg'i w'f'cp'grt'cdclq'uqukgpp'g's wg.'gp'r tko gt'hw'ct.'rc'vte{ gevtkc' f g'Vq{ qvc' Cti gpvpc' guv' »xkpwrc'f'c' »rc' »estrategia empresarial' i mdcn'f g'Vq{ qvc' O qvqt' Eqtr qtcvqp'c'kplekqu'f g'uki nq.'s wg'ug'ectcevgtk' cdc'r qt'vpc'o c{ qt'g'zr cpuk»p'gp'rtu'o gtecf qu' go gti gpvgu'{'rc'd'Àus wgf'c'r qt'kpuvrc'tug'eqo q'wpc'o ctec'oi mdcn'0' Cf go °u.'guc'gustcvgi kc' guvdc' kphwpekecf'c' r qt' tcui qu' f gr' go r tguclcf q' lcr qp²u' kpvtpcekppcrk' cf q.' gr' ewcn' ug' ectcevgtk' c'r qt'rc'r rcp'k'kecek»p'gp'gr'rti q'r r' q'{'rc' qu'eqqr gtcvku'qu'eqp'uwu'r tqxggf qtgu' mcegru'0'Guc'hqto c'f'g'xkpwrc'ek»p'lcr qp'guc.'{'f'g'Vq{ qvc'gp'r ctvkwrc't.'r gto kkgtp'wp'o qf gr' f g'pgi qekqu'uwv'gp'vdr'eqo gtekm gpv'eqp'wp'cnu'f gucltqmq'f g'r tqxggf qtgu'mcegru'gp'gr' r c'f'u'0''

Gp'ugi wpf q'hw'ct.'ug'r rcpvc's wg'rc'gustcvgi kc'r kqpgtc'f g'Vq{ qvc'gp'gr'0' gtequw'f g'v'p'gt' r r'vchqto cu'r tqf wex'cu'gzenvuk'cu'r etc'Dtcukn'{'Cti gpvpc.'rg'eqphk'»'cn'ugi wpf q'wp'tqn'f g' r tqf wvqt'f g'eco kqpgvcu'r keni'w'u'o gf kpcu'{'xgj 'f'w'qu'w'k'ct'kqu'f gr qt'vku'qu'»Sport Utility Vehicles.'UWXu'r etc'Co ²tlec'Ncvkpc'0'Guq.'c'uw'xgl.'rg'r gto k'k'»cwo gpvt'rc'r tqf week»p'f g' wp'dk'gp'f go cpf'cf q'r qt'gr'ugevqt'r tko ct'k'gp'rc'tgi k»p'»r keni'w'J knw+.'s wg'ug'gpeqvt'cdc'gp' r r'p'q'c'ueg'pu'c'kplekqu'f g'uki nq.'{'f'g'xgj 'f'w'qu'f g'r cuclgt'qu'r etc'ugevqt'gu'uqekrgu'f g'cnu' kpi tguqu' »UWX'UY 6+.'ew{c'f go cpf'c'wxq'wpc'o gpqt'eqtt'g'rc'ek»p'eqp'rc'cnc'xqr'v'k'cf' geqp»o kec'f'g'Cti gpvpc'{'rtu'r c'f'ugu'f g'rc'tgi k»p'0''

2 - Marco teórico

Gr'rt'gug'p'g'uw'f'k'cf'qr'vct' »wp'o cteq'cpc'f'f'k'eq's wg'eqo d'k'p'f'qu'cd'q'tf'cl'gu'v'g'»t'k'equ'»gr' gphqs wg'f'g' »cadenas globales de valor' »EI X+'{'rc'r g'ur'ge'v'xc'f'g'rc' »estrategia empresarial f'g' rc' »uqekmqi 'f' »geqp»o kec'0' Gr'r tko gt'q'f g'²uqu'f gh'k'p'g'c' »rc'u'EI X' »eqo q'rc' »secuencia de actividades que las firmas y los trabajadores realizan desde el diseño de un producto hasta su uso final' » »I gt'ghk'{'Hgt'pcpf'gl' /Uctm'4233<6-8'{' »qht'geg'wpc'f'guet'k'ek»p'guk'k'cf'c'f'g'guc'u'

⁸ »Nqu'cwqt'gu'I gt'ghk'{' »Mqt'g'p'ky'lel' »3; ; 6+.'t'g'v'qo'cpf'q' »rtu' »cr'qt'v'gu'f'g'rc' »v'g'q't'f' »gr' »uk'v'go'c/o'w'p'f'q' »VUO+ »J'qr'n'k'pu'{' »Y'c'm'g't'ug'k'p.' »3; ; 8+.'g'r'd'q't'c't'q'p' »gr' »eq'p'egr'v'q'f'g' »cadena global de commodity' »EI E+'s'wg' »n'v'gi'q' »o'qf' »k'k'ect'q'p' »gp' »cadena global de valor' »EI X+' »I gt'ghk'g'v'c'ri'0'4227=J' »wo'r'j't'g'l' »{' »Uej'o'k'j'.'4224+0'Guqu'eco' »dk'qu' »gp'rc' »eq'p'egr'w'c'ri'k' »k' »r' »r' »k'ect'q'p' »s' »w'g'd't'g'u' »eq'p' »gr' »o' »c'teq' »v'g' »t'k'eq'f' »gr' »uk'v'go'c/o'w'p'f'q.' »r' »t'k'p'ek' »cm' »gp'v'g' »gp' »v'q't'p'q'c' »rc' »ew'g'u'k»p'f' »gr' »desarrollo. »Nqu'cwqt'gu'f'g'rc' »VUO' »u'qu'v'k'p'p' »s' »wg' »gr' »g'p'h'q's' »wg'f'g' »EI X' »r' »q'ugg' »w'p'c' »ò'k'w'k' »p'f' »gu'c't't'q'n'k'w'c'ò'{'c' »s' »wg'r' »rc'p'v'g'c'p' »s' »wg'rc' »k'p'ug't'el' »p'f'g' »go' »r' »t'g'uc'u'{' »r' »c'f' »u'g'u' »gp' »rc'u' »EI X' »k'o' »r' »k'ec' »w'p'c'o' »gl'q't'c'r' »c'tc'²' »u'qu.' »o' »k'p'v'c'u' »s' »wg'rc' »VUO' »r' »q'ugg' »w'p'c' »x'k'k' »p'o' » »u' »g'u'v' »k'ec' »gp'rc' »ew'c'ri'rc' »o'c{qt' »r' »c't'v'g'f' »gr' »x'c'm'q't'f'g' »g'uc'u' »ec'f' »g'p'c'u' »gu' »v'c'p'uh'g't'k'q'c' »h'q'u'r' »c'f' »u'g'u' »eg'p't'c'rg'u.' »uki' »w'k'p'f'q' »rc' »x'k'k' »p'f'g'rc' »V'g'q't'f'f'g'rc' »F' »gr' »g'p'f' »g'p'ek' »{' »rc' »cadena imperial'f'g' »Ng'p'k' »3; ; 39+ »C'tt'k'i' »j' »k'3; ; 2= »D'ck.'4227= »Y'c'm'g't'ug'k'p.' »3; ; : »0' »R'ct'c' »eq'p'w'n'c't' »u'q'd't'g' »h'q'u' »è'co' »dk'qu' »gp' »h'q'u' »f' »k'g't' »g'p'v'g'u' »eq'p'egr' »v'q'u' »f'g' »ec'f' »g'p'c'u' »f'g' »x'c'm'q't' »x'g't' »U'w't'i' »g'q'p' »4232+ »q' »D'ck' »4227+0'

tgf gu'c'r ct vkt f g'f qu'eqpegr vqu'emxg<gobnanza">{"upgrading" I gtghk'gv'cr0'4227="Rqt v'gv'cr0" 4236+0"

Nc'pqekp'f g'upgrading'ug'cr q{ c'gp'wpc'eqpegr ekp'bottom-up. "cnhqeck ctug'gp'e»o q" rcu'hto cu'uidqtf kpcf cu'r wgf gp*q'pq+'k "gucncpf q'gp'rc'ecf gpc0Gnr tqr »ukq'f gr'eqpegr vq'f g' upgrading"gu'gzco kpcf "mqu'r tqeguqu"{"rcu'hqto cu'gp's wg'rcu'go r tgucu's wg'pq"i qdkgtpcp"rc' ecf gpc"*{"r qt"m" wcpvq" gu'p"uidqtf kpcf cu'uidgp" gucncpgu" gp"rc" gucnc" kpvtpcekqpcn'f g' cevxxkf cf gu'f g'xcmqt"ci tgi cf q."o qxl² pf qug'f guf g'cevxxkf cf gu'f g'dclq"xcmqt"cevxxkf cf gu'f g' cnq'xcmqt'r ctc'cwo gpvct'hqu'dgpgheku'f g'r ct vkekr ct'gp'EI X"Dck"{"I gtghk'4225+0Gri'gphqs wg' f g'rcu'EI X'gs wkr ctc'upgrading"desarrollo económico *O krdgti {"Y kpmgt."4235+."

Rqt"uw'r ctvg."rc" f g' gobnanza"ko r nkec" wpc"xkukp"top-down."cn'cpcrk ct"e»o q"rcu' go r tgucu'nf gtgu'f g'rc'ecf gpc'eqvtqrcp"{"vqo cp'rcu'f gekukqpgu'rki cf cu'c'rc"qti cplk cekp'f gr' r tqeguq'r tqf wevxxq" I gtghk'gv'cr0'4223."4227+0Nqu'r tko gtqu'kpvqqu'f g'ukugo cvk cekp"{" erukhecekp'f g'rcu'hqto cu'f g'i qdgtpcpl c"hwgtqp'tgcrk cf qu'r qt" I gtghk'*3; ; 6+."s wkep"r qt" gpvqpegu'kf gpvke»"f qu'vr qu'r tkekr cngu'f g'ecf gpcu'rcu'f kki kf cu'r qt"gr'eqo r tcf qt"*buyer-driven+"rcu'f kki kf cu'r qt"gnr tqf wevt *producer-driven+0Nwgi q."f lej q'eqpegr vq'hwg'vr kkecf q" gp"ekpeq" f kxgtucu"ecygi qt'cu'c+f g"o gtecf q="d+"o qf wrc="e+" tgrcekqpcn="f+" ecwxxc" {"g+" lgt^a ts wlec."s wg'lwti gp'f g'rc'eqo dkpcekp'gpvt'g'gu'xctkcdngu'c+rc'eqo r nglkf cf "f g'nkpvgteco dkq" f g'kphqto cekp"gpvt'g'r tqxggf qt"{"eqo r tcf qt."d+rc'eqf kkecdkcf cf "f g'rcu'kphqto cekp"{"e+rc" gzkwgpek"*q'pq+f g'ecr cekf cf gu'gp'hqu'r tqxggf qtgu" I gtghk'gv'cr0'4227+0"

Gp'ewcpvq"rc'ecf gpc'f g'xcmqt'cwqo qvkt "guc'rkgtcwtc"j c'ecvnci cf q"rcu'f kkvqqu' gur cekqu'pcekqpcrgu'r tqf wevt gu'f g'xgj 'ewqu'gp'vtgu'i tcpf gu'i twr qu'centro."semi-periferia"{" periferia integrada f gr gpf kppf q" f g'uwu'ecr cekf cf gu."hwpekqpgu"{"r tqr kgf cf "f g'rcu'go r tgucu" *O qtf wg"{"Uy gpgg{."4242="Rcxnpgm"423: "Uwiti gqp"{"Hqtkf c."4222+0Guq'r gto kw'gpvqpf gt" gnlni ct's wg'vkgp'Gti gpvkc'gp'rc'EI X'cwqo qvkt 0"

F g' guv" o qf q."mqu' cr qt vgu" o ^a u" tgrxcpvqu" f g' guv" gphqs wg" r ctc"rc" kpxguki cekp" r tqr wguv'ug'dcucp'gp'rc'f guetkr ekp'vqcnf g'rc'ecf gpc'f g'xcmqt'cwqo qvkt . "vplkpf q'gp'ewgpc" f guf g'gn'f kug^o q"j cuvc'gn'wuq'kpcn'f gn'r tqf wevq."s wg'gp'guv'ecuq'uq'mqu'xgj 'ewqu'r tqf wekf qu" r qt"Vq{ qvc'Gti gpvkc0Gn'ugi wpf q'grgo gpvq'f g'ko r qt vpekc"gu'gn'tqn'f g'rcu'hto cu'nf gtgu's wg" o qf gcp'guc'ecf gpcu."s wg'gp'guv'ecuq'iq'glteg'Vq{ qvc'Gti gpvkc'eqp'iqu'r tqxggf qtgu'qecrgu" {"gz wcp lgtqu."{"eqp'rc'tgf "f g'eqpegukqpcrkqu"{"enkgpvu'qecrgu"{"hqt^a pgqu0"

Ukp" go dcti q." guv" o cteq" vgtleq"hwg" wkrk cf q" o c{qto gpv" c" plxgrgu" f g'ugevqtgu" geqp»o lequ" {"pq" f g'hto cu'kpf kxkf wcrnu0Rqt" guv" o qvxxq."cn' wpcu'cwqtgu"eqo gpl ctqp" c" r rpvgt"rc'ko r qt vpekc" f g'rcu'f gekukqpgu'f g'cevqtgu"gur ge'hequ."tgo ctecpf q"rc'pgegukf cf "f g' npxct"guv'cp^a rku'cn'plxgn'f g'rc'go r tguc"Qrxgkc'gv'cr0'423; "Rqpv"{"Uwiti gqp."4236="Ucnu"

{\ {ndgt dgti .423; #0Gp'r ct vewrct. "Rcxnfp gni"423: <4+"uquvkgpg"s wg" "existe una gran escasez de análisis en profundidad a nivel de empresa de los vínculos de IED en las periferias integradas". "Cu" "Ucm" {\ {ndgt dgti "4237+"kpeqr qtctqp" c" f lej q" cdqtf clg" gn'eqpegr vq" f g" estrategia corporativa f gur rgi cf q" r qt" nqu" guwf kqu" f g" r" cf o kpkvtcek»p" f g" go r t gucu" *management studies+0Nc"o luo c" gu'f ghkpk c'r qt" f lej q" eco r q" f g" guwf kqu" eqo q" gn'r vt»p" f g" f gekukppgu" gp" wpc" eqo r c° "c" s wg" f gvto kpc" {" t g x g r c" u w u" q d l g v k x q u" q" o g v c u. " r t q f w e g" r c u" r t k p e k r c r u' r q n' k e c u" {" r n p g u' r c t c" n j t c t m u. " {" f g h k p g' r c" i c o c" f g' p g i q e k q u' s w g' r c" g o r t g u c' x c" c" r g t u g i w k t. " g n' v k r q' f g' q t i c p k c e k » p" j w o c p c" {" g e q p » o k e c' s w g' g u' q' k p v g p v c' u g t. " {" r c' p c w t c r g l c' f g" r c" e q p v t k d w e k » p" g e q p » o k e c' q' p q' g e q p » o k e c' s w g' k p v g p v c' d t k p f c t" c" u w u' r t q r k g v t k q u. " g o r r g c f q u. " e n l g p v g u" {" e q o w p k f c f g u' " C p f t g y u. " 3; : 9-0"

Guc" r g e w t c" f g" r c u" e s t r a t e g i a s e m p r e s a r i a l e s" j c" u k f q" e t k k e c f c" r q t" g u v c t" d c u c f c" g p" r c" n i k e c" f g" r c" g e q p q o " c" p g q e r f u l e c" f g" c e v t g u" t c e k q p c r g u" o c z k o k f c f q t g u" *I w k n? p. " 4225= J c o k n q p" {" D k i c t v. " 3; : : + {" p q' x l p e w r c t u g' c" q v t c u' f k o g p u k q p g u' f g' c p a r k u k u. " v c r g u' e q o q' g n' r q f g t. " r c' t g r e k » p' e q p' g n' G u c f q" {" q v t q u' c e v t g u' g e q p » o k e q u. " {" c' s w g' g u' s' e g p v t c f c' g p' w p c' b o k t c f c' k p v g t p c" f g' r c" n i k e c" q t i c p k c e k q p c n' *I c i i g t q. " 4234= P c x c t t q. " 4242+0R q t" n j" v c p v q. " f g u f g' r c" u q e k q n j i " c" g e q p » o k e c' u g' j c p' r t q r w g u v q' q v t c u' x c t k c d r g u' r c t c' v g p g t' g p' e w g p v c' g p' g n' g u w f k q' f g' r c u' e s t r a t e g i a s e m p r e s a r i a l e s e q o q' g n' t q n' f g n' G u c f q. " r c u' f k u k p v c u" j g t t c o k g p v c u' f g g u v c d k k c e k » p' f g n' g p v q t p q" s w g' w k r k c p' r c u' h k t o c u. " g n' r q f g t' f g' b g t e c f q" {" r c u' f k p a o k e c u' k p v g t p c u' f g' r c u' g o r t g u c u' g p' r c" v q o c" f g' f g e k u k p p g u" *H k i u v g k p. " 3; : 9= H k i u v g k p" {" O e C f c o . " 4233= I c i i g t q. " 4234+0"

F g" g u v g" o q f q. " r c" u q e k q n j i " c" g e q p » o k e c" u g" c r g l c" f g n' c d q t f c l g" g e q p q o k e k v c" f g" r c u" g o r t g u c u. " g p' g n' e w c n' u g' r c u' g p v k p f g' e q o q' c i g p v g u' o c z k o k f c f q t g u' f g' k p h q t o c e k » p' e q o r r g v c" {" t c e k q p c r k f c f" r g t h g e v c" {" r t q r q p g' p w g x c u' x c t k c d r g u' r c t c' g n' c p a r k u k u' f g' r c u' h k t o c u' 0 R c t c" H k i u v g k p" {" H i g g r c p f " * 3; ; 7 < 62 + " g n' o g l q t' c d q t f c l g" r c t c' g u v g' q d l g v q' f g' g u w f k q' u g' t g c r k c' f g u f g' g n' 2 p h c u k u" g p" e » o q" r c" j k u v t k c" {" r c u' t g r e k q p g u" u q e k c r g u" k p e k f g p" g p" r c u' t g r e k q p g u" g e q p » o k e c u" g" k p u k w e k q p c r g u" 0 C' u w' x g l . " H k i u v g k p " * 3; ; 2 + " u q u v k g p g' s w g' i n u' c e v t g u' s w g' e q p v t q m p' q t i c p k c e k q p g u" f g d g p" k p v g t r t g v t" u w u" e c o r q u" q t i c p k c e k q p c r g u" {" n w g i q" m g x c t" c" e c d q" r c u' r q n' k e c u" f g" r c" q t i c p k c e k » p. " d c u c f c u" g p" u w u" r g e w t c u" f g n' e c o r q 0 G u c' r q n' k e c" g u v c t a" f g r i k o k c f c' r q t" r c" n i k e c" k p v g t p c' f g' r c" q t i c p k c e k » p. " n j' s w g' g u v q u' c e v t g u' e q p q e g p. " e » o q' g u v q u' c e v t g u' r g t e k d g p' g n' o w p f q" {" n j' s w g' f g h k p c p' e q o q' w p c' c e k w f " q t i c p k c e k q p c n' c r t q r k c f c" * H k i u v g k p. " 3; ; 2. " 4223+0"

N c u' h k t o c u. " e q o q' q v t c u' q t i c p k c e k q p g u' u q e k c r g u. " u q p" g z r t g u k q p g u' f g' w p" q t f g p' u q e k c n' g" k o r n e c p' w p' c d c p l e q' f g' r q u k d r g u' c e e k q p g u' n g i " k o c u" * H k i u v g k p" {" H i g g r c p f . " 3; ; 7 + 0 U k' d l g p' g z k u v g p" t c e k q p c r k f c f g u' g e q p » o k e c u. " g u c u' p q' u q p' k f 2 p v k e c u. " {" o g p q u' w p c' h w g t | c' p c w t c n' k p f k h g t g p e k f c. " u l p q" s w g' x c t " c p" u w u c p v k x c o g p v g' e q p" r c" j k u v t k c. " e w n w t c" g" k p u k w e k q p g u" f g" e c f c" u q e k g f c f" * D k i c t v. " 3; ; 9 < 42+0 N c u' q t i c p k c e k q p g u" g e q p » o k e c u" g u v p" k p u g t v c u" g p" n q u' r c v t q p g u" f g"

gpvqpf ko kpvq "f g" uqekgf cf gu"o a u"co r rlcu"gp "f qpf g"ug"gpewgpcp" {"f gucttqmpc" *Hki uvglp." 3; ; 2=I wkn? p." 3; ; 6+0' Rqt" m" vcpvq." f kgt gpvu" vr qu" f g" o gtecf q" {"hko cu" go gti gp" eqo q" tguwncf q" f g"rcu"tc { gevqt kcu"j ku»t kcu" f g" f kwpvcu" uqekgf cf gu" *O qti cp. "4223<: +0'

Cj qtc" dkgp."rcu"Go r tgucu"O wnpcekqpcrgu"uqp"wp"vr q" f g" qti cpk celap" r ct vewct "s wg." r qt "f ghpklep." vkgp"rc"ectcegt"vlec" f g"qr gtct"gp" f kwpvu"r c"gu" {"guq"i gpgtc"wp"pkgn'o a u" f g"cp" ruku"s wg"rcu"go r tgucu"pcekqpcrgu"O'F g"guvg"o qf q."rcu" hkrngu" f g"rcu"GO u"ug"gpewgpcp" cwtcxgucf cu"pq"u»m"r qt"rcu"eqo r rglk cf gu" f g"wp"qti cpk celap"pcekqpcn"ulpq"s wg."cf go a u."r qt" gn'tqn"s wg"lwi cp"cn"kvgtkqt" f g"wp"eqtr qtcekp"i mdcn" *I j quj cn" {"Dctvww." 3; ; 2=Rtcj crxf" {" F qj ." 3; ; 9+0' Rqt" m" vcpvq." ug"xgp" kpxqmwetcf cu"gp"wp" f qdrng"lwi q<"mecn"gp"rc"kvgtceekp"eqp" qvcu"go r tgucu."i qdkgtpqu" {"endgpvu" f g"wp"r c"u." {"o wpf kn"cn'ewo r rkt"wp"r cr gnf gvgt o kpcf q"gp" rc" gutwewtc"o wnpcekqpcn" f g"wp"eqtr qtcekp" {"hqt o cpf q" r ct v" f g"wp" gutcvgi k"qr gtcvxc" i mdcn"}

Guc"vpu"gpvtg"rcu" gutcvgi kcu" f g" *incrustación* " *embeddedness" + "mecn" {"i mdcn"gu" eqpukwvxc" r ct c'eqo r tgpf gt" c'rcu"GO u" {"lwu"lwdukf kctku" *O qti cp. "4223+0D" uleco gpvg. tghnglc" rc"uko wncpgkf cf "f g"wp"geqpqo "c"i mdcn"rcu"»tf gpgu"r q"vlequ" g"kvwkwkqpcrgu" hci o gpvcf qu" c"pkgn"pcekqpcn" {"rcu"t mcekqpcgu" uqekrgu" {"r tqf vevxcu"eqpegpvcf cu"mecn" {"tgi kqpcm gpvg" *J gkf gptglej ." 4234+0' Gu"r qt" guvcu"tc| qpgu"s wg" guvcu" qti cpk celqpgu"j cp"ukf q" f ghpkf cu"eqo q" *espacios sociales trasnacionales* f gdf q" c"rc"kvgtf gr gpf gpek"gpvtg"gn"gur cekq"vcupcekqpcn" {" rcu"pcekqpcrgu" *O qti cp. "4233<639+. Guvcu"gpvtgetw co kpvqu"pq"uqmq" gu" p"kvgi tcf qu"r qt" pqto cu" {" r tqegf ko kpvqu" hqt o cngu." ulpq" vco dkp" r qt" tgf gu" kvgtr gtuqpcrgu" gpvtg" cnqu" f kgevxqu"s wg" vkgp" s wg"j cegt" hgpvg" c"rcu" f gucl"qu" f g"gpvtqpcu"pcekqpcrgu"j gvgtqi 2 pgqu."cn" vgo r q" s wg" ug" tgp" {" eqqr gtcp" gp" pwo gtqucu"tgwkpqpgu." gxgpvu" uqekrgu" {" r tqf gevqu" vcpcekqpcrgu." f gucttqmpf q"cu" t mcekqpcgu"kvgt pcekqpcrgu" {"o qf gnu" c"ugi vkt'}

F g"guvg"o qf q."rc" r tguvg" kpxguki celap" r tqr qpg"eqvkwct"rc" f kgeekp" r tqr wguv" r qt" Ucn" {" \ { mgt dgti " *4237+"cn"cpck ct"wp"ecf gpc" f g"xcmt" c"r ct v" f g"wp" hko c" kpf kxkf wcn" cvgpf kpf q"rc" hqt o c" f g" r tqf weekp" f g"rc"ecf gpc" {"rc" *gobernanza* " f g"rc" go r tguc" rff gt'Ukp" go dcti q." gm" ug" mxtc" c" ecdq" cf qr vcpf q" et" vleco gpvg" gn" gzc o gp" f g"rcu" *estrategias empresariales* O' Guv" r tqr wguv" f guf g"rc" uqekqmi "c" geqp»o lec" r qugg" cpvgef gpvu" gp" rcu" guwf kqu" f g"rcu"ecf gpcu"i mdcn" f g" r tqf weekp" f g"rcu"gevt" cwqo qvt" *Rctf k" 423; +. "f g"rcu" go r tgucu"cwqo qvlegu"lcr qpqucu" {"f g"Vq { qv"gp" r ct vewct" *J glo ." 4238. "4239. "4242+" {"f gn" guwf kq" f g"ecuq" f g"p kuucp"gp" Dtcukl" *Y cm tcvj {" Ucn" Rgtgk" f qu"Ucpvu." 4242+0Cu" c" vtcx²u" f g"guvg" gphqs wg"v»tkeq"ug"dwuecp"pwxcu" xctkcdngu" f g"cp" ruku"s wg"pq" gu" p" r tguvgu"gp"rcu" guwf kqu" f gn" *management* " {"ugt" p" f g"ko r qt vpek" r ct c"gpvgt"rc" gzege kqpcrk cf "f g"Vq { qv" {" uw'ecf gpc" f g"xcmt"gp"gn'o gtecf q"cti gpvqo"

3 - Metodología

Nc" gutcvgi kc" f g" kpxguki cek»p" ug" eqphki wtc" eqo q" wp" õguwf kq" f g" ecuqö" f gdlf q" c" r" r tqr wguv" f g" cp^a ruku" f g" r" go r tguv" Vq { qvc" Cti gpvkpc0Gn'guwf kq" f g" ecuq" gu" wpc" kpxguki cek»p" go r ¶lec" s wg" guwf kc" wp" hgp»o gpq" eqpvgo r qt^a pgq" f gpvt" f g" uw" eqpvz" vq" f g" r" xkf c" tgnl" ¶l kp." 422; +0I gpgtcm gpvg" ug" cf qr v" guv" o gvqf qmji ¶c" ewepf q" rnu" r tgi wpcu" f g" kpxguki cek»p" ug" dcucp" gp" gn' õe»o qö" { " gp" gn' õr qt" s w² ö." gu" f gekl." uqp" f g" vkr q" õgZR nqcvqtkcü" cr rlecpf q" wp" eqplwpvq" f g" r tqeguqu" r tgxkco gpvg" gur gekhkecf qu" { " cewf kgpf q" c" kphqto cek»p" f qewo gpvni" { " gpvtgxkrcu0Gu'ertq" s wg" rnu" guwf kqu" f g" ecuq" pq" tgr t gupvcp" c" wpc" o wguvc" f g" wpc" r qdrckek»p" q" f g" wp" wpxgtuq" eqpetgvq." r qt" rj" s wg" pq" r wgf gp" ugt" i gpgtcrk cdrgu" guvc ¶jvkeco gpvg." ukpq" c" r tqr qulekqpgu" vgtlecu." { c" s wg" gn' qdlgvkxq" f gn' kpxguki cf qt" gu" co r rket" { " i gpgtcrk ct" vgt¶cu" ¶i gpgtcrk cek»p" cpcr¶lec+" { " pq" gpwo gtct ¶tgewepcku" ¶i gpgtcrk cek»p" guvc ¶jvkec+" ¶l kp." 3; ; : +0'

Gp" r ct vkwrt." gung" guwf kq" f g" ecuq" ug" f gucttqmc" kpvgi tcpf q" o gvqf qmji ¶cu" ewckvkvx" cu" { " ewcpkvkvx" cu" gp" gn' tgrxco kgpvq" { " cp^a ruku" f g" f cvqu0Gp" r tko gt" hwi ct." ug" tgerk c" wpc" dtgxg" t gug^o c" j ku»tlec" f g" r" kpf wvkc" cwqo qvtk" gp" Cti gpvkpc." f guetkdkp" q" { " cpcr¶k cpf q" rnu" ectcevt¶jvkecu" gutwewtcrgu" f g" r" tco c" c" r ct vkt" f g" r" tgxkuk»p" f g" r" rkvgtcwtc" gur gekr¶k cf c." rnu" r tpekr crgu" f kur qulekqpgu" kpvkwekqpcrgu" gp" gn' ugevq" { " gn' gzco gp" f g" f kvkpcu" ugtkgu" guvc ¶jvkecu" eqo r tgpf kf cu" gp" CF GHC." CHCE." R F GE." EQO VTCF G." QGF G." T gxkuc" O gtecf q" { " r" ddkr¶qi tch¶c" gur gekr¶k cf c0Nwgi q." ug" wvkr¶k cp" f lej cu" dcugu" f g" f cvqu" { " qvtcu." eqo q" CECTC." Uqhtcf g" { " Cf wpc." r ctc" cpcr¶k ct" eqo r ctcvkvco gpvg" gn' f gugo r g^o q" f g" rnu" r tpekr crgu" xctkcdrgu" ugevqtkrgu" gpvt" g" rnu" vgt o kpcrgu" cwqo qvtlegu" tcf kecf cu" gp" Cti gpvkpc" { " gur gekhkect" r" vtc { gevqtk" r ct vkwrt" f g" Vq { qvc" gp" gn' r c¶u0Ncu" xctkcdrgu" s wg" ug" cpcr¶k cp" uqp" 3+r tqf week»p" vqvn" { " r qt" vkr q" f g" xgi ¶ewuq." 4+" gxqmwel»p" f gn' go r rñq." 5+" r ct vkekr cek»p" gp" rnu" xgpvcu" f g" rnu" 422" go r tgucu" o^a u" i tcpf gu" f gn' r c¶u." 6+" gxqmwel»p" f g" rnu" gZR qt vcekqpgu." 7+" plxgn' f g" eqpegpvt cek»p lf kxgtukhkecek»p" f g" f guvkqu" f g" rnu" gZR qt vcekqpgu." 8+" ucif q" eqo gtelcn" { " 9+" eqpvkpf q" ko r qt vcf q" f g" rnu" xgi ¶ewuq" r ctc" gn' r gt¶qf q" 4224/423; 0"

C" eqpvkpcel»p." ug" tgerk c" wpc" tgeqput week»p" j ku»tlec" f g" r" vtc { gevqtk" f g" Vq { qvc" gp" lcr »p" kf gpvkhkecpf q" rnu" ectcevt¶jvkecu" r ct vkwrt gu" f g" uw" gutcvgi kc" eqtr qtcvkvco0Nwgi q." ug" cpcr¶k cp" rnu" gvr cu" f g" r" go r tguv" o wvkvcekqpcn' j cekp" q" 2 phuku" gp" rnu" f² ecf cu" f g" 3; ; 2" { "

⁹"Gung" kpf kecf qt" ug" eqput wka" c" r ct vkt" f gn' ¶pf leg" f g" J gthpf cj n' g" J kuej o cp" ¶J +*J kuej o cp." 3; 86+" gp" dcug" c" rnu" gZR qt vcekqpgu" tgerk cf cu" c" ecf c" r c¶u" f g" f guvkqu" 0' : "Nc" guvko cek»p" f g" eqpvkpf q" ko r qt vcf q" ug" tgerk c" c" r ct vkt" f g" rnu" ko r qt vcekqpgu" f g" r ct vgtu" { " r kgl" cu" f g" ecf c" vgt o kpcn' ugi Àp" rnu" erukhkecek»p" f g" r qulekqpgu" ctcpegrtkcu" j gej c" r qt" I^a ttk" gv'cn" 4236+" uqdtg" gn' xcmq" gp" r guqu" f g" ecf c" o qf gñu" r tqf vekf q" r qt" ecf c" vgt o kpcn' gp" lwrk" f g" ecf c" c" q" ugi Àp" rnu" i w¶c" qhkecnf g" r tgekqu" f g" CECTC" ¶eqpuwncf c" c" r ct vkt" f g" y gd0tej kxg0ti +clwvuf q" r qt" gn' r tqo gf kq" cpwcnf gn' vkr q" f g" èco dlq" f gn' »rct" guvc qwpkfp gpug" f gn' DETC" uwo cf q" c" rnu" gZR qt vcekqpgu" f g" cwqr ct vgtu" f g" ecf c" vgt o kpcn' cwqo qvtk" cti gpvkpc0'

r tlpokr kqu'f g'4222. "gp'rcu'ewcrgu'f gekf g'tcf lectug'gp'Cti gpvpc" { 'r tqo qxgt "guv'hkrci0Cu'ug' r tgvpf g'gpvpf gt'rc'gutcvgi k'f g'Vq{ qvc'O qvt "Eqtr qtcvqp'gp'guv'hcug" { 'gn'wi ct's wq'qewr c' gn'O gtequw' { "Cti gpvpc'gp'uw'gutwewtc'o wvpcckqpcn0Guv'gzco gp'ug'ngxct^a "c'ecdq'c'r ctvt' f g'rc'tgxlk»p'dkrlqi t^a hlec'f g'rc'rkgtcwtc" gur gekrk cf c" { "f qewo gpvqu" go r tguclkrig. "eqo q' wco dk2 p. 'gn'cp^a rkuku'guv'f ¶vkeq'f g'dcugu'f g'f cvqu'f g'rc'go r tguv'gutwewtc'ceekqpc'f g'VO E" { 'r tqf week»p. "xgpvcu" { "ectcevt¶vkecu'f g'uwu'hkrcrgu+. "QEC" *r tqf week»p'f g'rcu'vgo kpcrgu'c" plxgn'i mdcn' { "Hqtwp'g'I mdcn'722" *i cpcpeku'f g'rcu'vgo kpcrgu'c'plxgn'i mdcn'0"

Nwgi q. "ug" tgeqputw'f g'rc' *incrustación nacional* "f g'Vq{ qvc"Cti gpvpc0Rctc" gm. "ug" cpcrk ct^a "rc'j kvqtk'f g'rc'go r tguv'gp'gn'rc'¶u. "uw'gutwewtc" qti cpk cvxc" { "rcu'ectcevt¶vkecu'f g' uw'ecf gpc'f g'xcmq0Rqt "wp'rc'f q. "ug" cpcrk cp"uwu'r tq{ gevqu'f g'lpvgtuk»p. "r rcpgu'f g'pgi qekqu. " cr q{ qu'f gn'Guv'f q. 'tgrck»p'eqp'gn'vpc'kcvq. " { 'rc'gxqvwk»p'f g'rc'r tqf week»p' { 'rcu'gzr qtckqpgu' f g'rc'eqo r c^o ¶c0Cu'ug'gzco kpc'gn'vr q'f g'kpuvte»p'gp'mu'f kvkvqu'o gtecf qu'cwqo qvtegu'f g' Co² tlec'Ncvpc. "f vgo kpcpf q'rc" gur gekrk cf "f g'uw'ugi o gpvq. "rc"o gpt'kphwpekc's wq'vkgp'g" rc'xqrvk'cf "geq»o kcf'f g'rc'tgi k»p'gp'rc'f go c'f g'uwu'xg ¶vqu" { "rc'gxqvwk»p'f g'rcu' xgpvcu" gp"mu'r tlpokr crgu'o gtecf qu'f g'rc'tgi k»p'0Rqt "qvt q'rc'f q. "ug" kf gpv'klec"rc'hqto c'f g' *gobernanza* "f g'Vq{ qvc"gp'rc'ecf gpc'f g'xcmq. "f guetk'k'gp'f q" { "emv'k'k'c'p'f q'c'uwu'r tqxggf qtgu. " ectcevtk' c'p'f q'gn'vr q'f g'tgrck»p'guv'cdgek'c'eqp'² uvqu" { "tgeqputw'f gp'f q'gn'vr q'f g'cwqr ctvqu' ko r qv'cf cu" { "uwu' qt¶v' gpgu'0 C" uw' xg. "ug" cpcrk cp" gp" r tqhw'p'f k'cf "mu'r tlpokr crgu" qpeg" r tqxggf qtgu'cwqr ctvqu'f g'rc'vgo kpcn'k'f ci c'p'f q'gp'mu'r tqeguqu'f g'*upgrading* 's wq'² uvqu' j c{ cp'ngx'cf q'c'ecdq0"

Gm'ug'tgcrk' c'c'r ctvt'f gn'cp^a rkuku'f g³+f cvqu'ugewp'f ct'ku'r tqxgp'k'p'vqu'f g'uwu'dc'p'egu' go r tguclku.³² "f qewo gpvqu" go r tguclkrig. "pvk'k'cu" f g'r g'k'f lequ'f g'rc'c'p'eg' p'ck'qpcn' { "gn' Dqrgv'p" Qh'k'rcn' f g'rc' "Tgr Àdr'ec" Cti gpvpc" *DQTC=" 4+" gp'v'gx'k'rcu' ugo k'gutwewt'cf cu" c' glgew'k'qu'f g'Vq{ qvc" { 'r tqxggf qtgu'f g'rc'vgo kpcn'gp'rcu'ewcrgu'ug'cdq'f cp'mu'vki v'k'p'vqu'gl'gu'< c+'tgrck»p'vgo kpcn'r tqxggf qt. "d+"ectcevt¶vkecu'f g'rc'gutwewtc" qti cpk cvxc" f g'Vq{ qvc. "e+" r ctv'ew'k'f cf gu'f g'rc'vgo kpcn'gp'rc'k'p'w'k'c'cwqo qv'k' "cti gpvpc. "f '+'tgrck»p'eqp'rc'w'p'f cf " qti cpk cvxc" f gn'O gtequw' { "eqp'rc'ecuc"o cvk' "gp'Lcr »p. "g+'eqo r gv'p'ek'k'p'v'c/go r tguv'eqp' h'k'rcrgu'f g'uko k'rc'gur gekrk'ck»p'r tqf w'k'c. "v'rgu'eqo q'Vck'p'f k' { "Uw'^a h'lec. "h+'k'p'hw'p'ek' f gn'Guv'f q'gp'gn'f gugo r g^o q'f g'rc'eqo r c^o ¶c=" { 'i '+'r tqeguqu'f g'g'uec'rc'o k'p'v'f g'rcu'cwqr ctvqu=" 5+'x'k'k'cu" c'rcu'f' dt'k'cu'f g'Vq{ qvc" { "f g'uwu'r tqxggf qtgu=" { "6+"cp^a rkuku'guv'f ¶vkeq'f g'dcugu'

¹ "Nc'ugr'geek»p'f g'mu'r tqxggf qtgu'ug'j ct^a "gp'hw'p'ek»p'f g'rc'r qu'k'k'f cf "f g'rc'tgcrk'ck»p'f g'rc'gp'v'gx'k'rc. "dw'ec'p'f q' rc'tgr t'g'p'v'ek»p'f g'mu'v'gu'i t'c'p'f gu'i tw'qu'f g'cwqr ctvqu'ugi Àp" uw'q'ki gp'<lcr q'p'gugu. "o wvpcckqpcrgu'p'q' lcr q'p'gugu" { "m'ecrgu'0"
³² "Ceeg'f k'f qu'c'r ctvt'f g'rc'k'p'ur geek»p'I gp'g'c'f g'v'w'k'ek" *K L:0

eqo r tgp f kf cu"gp"CF GHC."CECTC."Uqhmcf g" { "Cf wpcp"*ectcevt¶¶uecu" { "gxqmwep" f g"rcu" gZR qtvekpqgu."ko r qtvekpqgu" { "eqvvpkf q" mēcn'f g"xgj ¶ewqu'r tqf wekf qu+."CF GHC."CECTC." CP HC XGC."Hgpdcxcg" { "Dpeq"O wpf kcn'ēqtg mēcep" f g"rc"r tqf weekp" { "xgpvcu" f g"xgj ¶ewqu" { "xctkcekqpgu" f gn'RKD" f g"Cti gpvpc."Dtcukn" { "Co 2 tlec" f gn'Uwt+" { "CP HC XGC" { "Hgpdcxcg" *r tqf weekp" { "xgpvcu" eqo r ctf cu"gp"Dtcukn"0"

4 - Contribución de la tesis

Ncu"eqpvtkdvekpqgu" f g"rc"vguku"ug" f kxf gp"gp" f kxkpvqu"pkxgrgu0'Gp"uw" f ko gpukp"o a u" vgtlec" { "i gpgtcrn'ug" gpo ctec"gp"gn'f gdcvgr" t gugpvg"gp"rcu"ekgpeku"uqekrgu"uqdtg"rc"ceekp" geqp»o lec" f g"rcu"go r tgucu0'Gp"r ctvevwt."rc"lpxgunki cekp"cdqpc^a "rc"kf gc" f g"s wg"rcu"htō cu" uqp"cevqtgu"uqekrgu"s wg"guv^o p"lphwkw"qu"r qt"o Ànkrgu"ncevqtgu."crgl^a pf qug" f g"rc"lpgvtr tgvcekp" f g"rc"geqpqo ¶c"pgqerñ ulec"/tgvo cf c"gp"qu"guwf kqu" f gn'*management*"g'*international business*/" s wg" rcu" gpvvpf gp" eqo q" ci gpvcu" wpkctkqu" o czko k cf qtgu" f g" kphqto cekp" eqo r rēvc" { " tcekqpcrk cf " r gthgevc0'Rqt" gn'eqpvtctkq."gp" guv" vuku"ug" gZco kpc^a "c"rc" hkrēn' f g" wpc" GO " lpgvtr tgv^o pf qrc"eqo q" wpc"qti cpk cekp"eqo r rēlc's wg"guv^o f qdrgo gpv'*incrustada*"c'r ctvk' f g"uw" tgf "lpgvtpcekqpcn" { "mēcn'0F g"guv"o qf q."uk'dlgp"ug"tgvo ct^a "rc"tgekpvgr" tqr wguv'tgcrk cf c'r qt" cwqtgu" f g"rcu"EI X's wg"uwi kgtg"gn'cp^a rkuku" f g"guvcu"ecf gpcu" c'pkxgn' f g"go r tguc."guv"ug"mgxct^a " c"ecdq"eqp"wp"ghqs wg" f kxkpvq" f g"rc"guvcvgi kc"go r tguctkcr0"

Gp"ugi wpf q"mī ct."rc"lpxgunki cekp"r tgvvpf g"cr qtvt"pwgxc"gxkf gpek"gp"rc" f kuewukp" uqdtg"qu"ghgevu" f g"rc"KGF " f g"GO u"gp"r c¶gu"gp" f gucttqmj."f cpf q"uwvvpvq" c"rc"xlukp"s wg" uqukpgp"s wg"pq"ug"r wgf g"guvcdrēgt" wpc'tgi rc"i gpgtcrn'uqdtg" f lej qu"o qxko kgpvcu" { c"s wg"guvqu" ko r cevu" f gr gpf gp" f g"pwo gtqucu"xctkcdrgu0'Gp"m'eqpegtkēpv" c'rc"KGF "gp"EI X"cwqo qvtēgu" ug"uquvvpf t^a "rc"ko r qtvepek" f g"qu"cp^a rkuku" c'pkxgn' f g"htō c."gpvvpf kēpf q" s wg"rcu"o kuo cu"pq"uqp" j qo qi 2 pgcu0"

Gp" wpc" f ko gpukp"o a u"gur ge¶lec."rc"vguku'dwec"eqpvtkdvkt'c'qu"guvcuqu"guwf kqu" f g"guv" o wnpcekqpcn'gp"r c¶gu" f g"Co 2 tlec"Ncvpc0' Cf go a u."gp"gn'ecuq"cti gpvvpq"pq"cdwpcp"qu" vcdclqu"s wg"cpckēgp"rcu"guvcvgi kcu" f g"rcu" hkrēn'qu"mēcn'gp"gn'r c¶ju.³³ ukpq" s wg"rc"o c { qt¶c" f g" 2 uqu"uwgrp"guwf kct"cn'ugevqt"cwqo qvqt"gp"uw"vcrk cf 0F g"guv"o qf q."rc"lpxgunki cekp"dwec" cr qtvt" f lej c" gur gekkēkf cf " f gn' cp^a rkuku" f gn' ugevqt." gpvvpf kēpf q" s wg" gzlvvp" guvcvgi kcu" f kgtgpekcf cu" gpvtg"rcu"o wnpcekqpcrgu" cwqo qvtēgu0' Culo kuo q."ug" tgcrc' ct^a p"pqxgf qucu" o gf lekqpgu" uqdtg" rcu" gZR qtvekpqgu." ko r qtvekpqgu" { " eqvvpkf q" mēcn' f g" qu" xgj ¶ewqu"

³³Cri wpcu"gzegr ekqpgu"gp"guv"ugpvkf q"uqp"ct| c" { 'Nqr gl '422: +q"Uej xct| gt*3; ; 7+0

r tqf wekf qu'r qt 'rcu'vgo kpcrgu's wg'pq'ug'tgi kmtcp'gp'tcdclqu'r t gxlqu0Cf go a u.'rc'vguku'cr qtvc" kphqto cek»p"qtki kpcn'f g"Vq{ qvc"Cti gpvkc" c"t cx² u'f gr'cp^a rkuku'f g'f c'vqu'f g"uwu'dcncpegu."f gn' tgrgxcokgpvq" f g" o gf kqu" i t^a hkequ" { " f gn' DQTC." { " f g" gpvtxkxucu" gp" r tqhwpf kf cf " eqp" uwu" r tkpekrcngu'glgewkxqu."r tqxggf qtgu'cwqr ctvku" { "ff' gtgu'ukpf kecrgu'f gn'UO CVC0"

C"uw'xgl. 'ug'eqpukf gtc's wg'gug'vr q'f g'guwf kq'cf s wkgg'gur gekn'tgrgxcpekc"gp'gn'ecuq" f g"Vq{ qvc"Cti gpvkc." { c's wg'r wgf g'dtkpf ct"cn' wpcu'tgur wgu"cu" c"nu'pwf qu'r tqdrgo a vkequ" f g" guc"tco c"kp'f wutkcn'gp'gn'r c'ju."vrgu"eqo q"uw'f² hkek'eqo gtekn" f gr'gp'f gpek"eqo gtekn'eqp" Dtcukn" gucuc"eqo r ngo gpvctk'f cf " r tqf wekxc" gp" gn'O gtequw." dclq" eqpvpk'f q" nqecn'f g" nu" xgj 'f'wru"q'rc'hqto c'f g'xk'pewrck»p"gpv'g'vgo kpcrgu' { " r tqxggf qtgu'nqecrgu0F g'gug'o qf q."guc" vgu'k'r tgv'p'f g"kf gp'v'lect"nu'hcevqtgu"gz'v'cr q'ndrgu'f gn'ecuq"Vq{ qvc."s wg'r qf t'f'p"o glqtct"rc" vtc{ gev'qtk'f gn'tgu'q'f g'rc'kp'f wutk"cwqo qv'k' "gp"Cti gpvkc" *{ "xkukdkk' ct'rcu'iko kcek'p'gu's wg" tgr' t'gug'p'v'p'nu'hcevqtgu'pq"gz'v'cr q'ndrgu'gp" f lej q" r tqeguq+."cu"eqo q" gudq' ct" gn'tqn'f g"rc" r q'f'lec'r Àdrlec"gp" f lej q" f gucttqm'0'

Nc"kp'f wutk"cwqo qv'k' "i nqdcn'gu^a "cvtcxguc'p'f q"wp"i tcp"eco dkq"v'gepq/r tqf wekxq" c" r ct'vt" f g"rc"o c { qt"eqp'ge'v'k'f cf."cwq'p'qo 'f'c."eqo r ct'v'ek»p" { "gr'ge'v'k'k'ek»p" f g"nu" xgj 'f'wru" *EUCG."r qt'uwu'uki rcu'gp'kpi r'z u+"gp'wp"eqp'v'z'v'q'f g't^a r kf qu'cx'c'p'egu'v'ge'p'q'n'i kequ" { "ci w'f c'et'kuku" erko a v'ec'0' Gp" gug" o cteq." gn'ugev'qt" cwqo qv'qt" cti gp'v'kp'q" / { " r tkpekrcm' gp'v'g" gn'gpv'tco cf q" cwqr ct'v'ku"nqecn"ug"xgt^a "gph'gp'v'cf q" c"o Ànk'rgu'f gu'c'f'qu0Rqt"m"v'cp'v'q."f gu'f g'gn^a o dkq" f g"rc" r q'f'lec'r Àdrlec" { "rc"r r'nc'pk'k'ek»p"gu"ko r t'guel'p'f kdng'gp'v'p'f gt"rcu'f k'v'p'v'cu'gut'c'v'gi kcu'f g"rcu" vgo kpcrgu'o w'v'p'ck'p'crgu's wg'f qo kpc'p'rc"ecf gpc"cwqo qv'k' "r ctc'dw'ect"rcu"o glqtgu'hqto cu" f g'ct'v'ek'w'ck»p"eqp'gmu'0"

"

5 - Presentación de los capítulos

" Gn'Ecr 'f'wru" 3" v'k'p'g" gn'qdl'g'v'x'q" f g"kp'v'q'f wekt" gn'cdq'tf clg" v'g>t'leq."rcu"j gttco kgp'v'cu" eqp'egr w'crgu" { "nu'r tkpekrcngu'cp'v'ge'gf gp'v'gu'f g'rc'k'p'x'g'v'ki cek»p0Cu" { "gp'r tko gtc'k'p'w'c'pek" *1.1+." ug'g'z'r q'p'gp'nu'cp'v'ge'gf gp'v'gu'f g'nu'gu'w'f kqu'u'q'ek'crgu'f g'rc'ge'q'p'qo 'f'c" { "f gn'f gucttqm'ge'q'p»o leq." eco r qu'f g'gu'w'f kq'gp'nu'ew'crgu'ug'k'p'ug't'v'c"gu'c"v'guku0Nw'gi q."ug'r t'gug'p'v'c"wp'q'f g'nu'cdq'tf clgu" v'g>t'leq/c'p'c'n'f'lequ"eqp"nu'ew'crgu'ug"t'cd'cl'ct^a "gp"rc"k'p'x'g'v'ki cek»p."gn'g'p'h'q's wg'f g"rcu"Ecf g'p'cu" I nqdcrgu'f g'X'c'm't" *1.2+0'Gp"r ct'v'ew'r'ct."ug"ug^o c'rc't^a "s wg'ug"cf q'r v'ct^a "gug"o cteq'r ctc'gn'c'p^a rkuku" f g'w'p'c'ecf g'p'c'f g'x'c'm't'gp'r ct'v'ew'r'ct."rc'rk'f g't'c'f c'r qt"Vq{ qvc"Cti gpv'kc0Gn'gu'w'f kq'f g'guc'h'k'k'cn' f g"rc"GO "Vq{ qvc"O qv'qt"Eqtr q't'c'v'k'p"ug"ng'x'ct^a "c"ecdq" c"r ct'vt" f gn'g'p'h'q's wg'f g"estrategias empresariales" f g'rc'u'q'ek'q'm'i 'f'c"ge'q'p»o lec."f gucttqm'f q'gp'gn'uki v'k'p'v'g'cr ct'v'cf q" *1.3+0"

Rquvgtkqto gpyv. 'ug'tgeqputw{ gp'mqu'r tlpkr crgu'cpvgeg gpvgu'gp'gn'guwf kq'f gn'ko r cevq' f g'rc'kpxgtuk>p'Gzvtcplgtc'F ktgevc'gp'r c'fugu'r gtlk? tlequ'*1.4+:"{ 'rcu'r ct vewrctkf cf gu'f g'guyg'vkr q' f g'kpxgtuk>p'gp'rc'ecf gpc'cwqo qvtk 0'Rqt'Ànko q.'ug'tgrgxc'p'mqu'vcdclqu'r tgeg'gpvgu'uqdtg'rc' gur gekhlek cf " f g' rcu' hkrgru" f g' vgtō kpcrgu" cwqo qvtlegu" f g' GO " lcr qpgucu" gp" gn' o wpf q." f kxkpi wk² pf qrcu'f g'rcu'f g'GGWW' { 'Gwtqr c'r tlpkr cmō gpyv'*1.5+0F g'guyg'o qf q.'mq'r tguv'v'f q' gp'guyg'ecr 'fww'ugp'v'c' a'rcu'dcugu'v>tleg/cpc'f'f'ecur'etc'gn'gzco gp'f g'wpc'ecf gpc'f g'xcnqt'c' r ctvkt'f g'wpc'hkto c'kpf kxkf wcn'cvgpf kpf q'rc'hqto c'f g'r tqf week>p'f g'rc'ecf gpc' { 'rc'i qdgt'pcp| c' f g'rc'go r tgu'c'f'f'gt. " { 'cf qr v'pf q'gn'gzco gp'f g'rcu'gust'v'gi kcu'go r tgu'ctk'rgu'f g'rc'uqek'q'qi 'f'c' geq>>o lec0'

" Gp'gn'Ecr 'fww'4'ug'tgcrk' c'wpc'dt'g'x'g't'gug' c'j kx>tlec'uqdtg'gn'f gu'ctt'q'm'f g'rc'kpf wv'k'c' cwqo qvtk' 'gp'Cti gp'v'pc'k'f gp'v'k'ec'pf q'uw'r tlpkr crgu'r tqdrgo a' v'ecu'c'm'q'rc'ti q'f g'rc'o kuo c0Ug' eqo kgp| c'guc'tgeqput'week>p'f g'f'g'mu'k'p'lek'qu'f g'rc'hcdt'lecek>p'f g'x'gi 'f'w'w'qu'gp'gn'r c'f'u'gp' 3; 42.'r cuc'pf q'r qt'uw'f kx'p'vcu'g'vcr cu'w'v'eqo kgp| q' { 'gzr cpuk>p'*3; 42/3; 97+*2.1.1+'gn'k'p'f g'rc'g'vcr c'r qt'uw'v'k'w'ek>p'f g'rc'kō r qt'v'ek'q'p'gu' { 'gn'guc'peco kgp'v'q'f gn'uge'v't'*3; 98/3; ; +*2.1.2+ { "rc'tgeq'p'hi wtcek>p'f g'rc'k'p'f wv'k'c'c'r ctvkt'f g'rcu'tghqto cu'gust'w'v'w'crgu' { "rc'hqto cek>p'f gn' o gtecf q'tgi kqpcn'*3; ; 2/4223+*2.1.3+0Ug'c'j qpf c'gp'rc'Ànko c'f g'guc'u'g'vcr cu' { c's w'g'cm'f'ug' f gur r'gi cp'eco dk'qu'gust'w'v'w'crgu'gp'gn'uge'v't's w'g'x'pc'c'o c'tect'uw'f gu'ctt'q'm'gp'gn'r gt'f'q'f q' uki w'k'p'v'g' { 'ug'k'p'v'c'rc'Vq { q'v'gp'Cti gp'v'pc'0"

" Nwgi q.'ug'c'p'crk' c'gn'tgeq'tt'k'f q'f gn'uge'v't'c'rc'uc'rk' c'f g'rc'rc'et'kuku'f g'rc'eq'p'x'gt'v'k'k'k' cf "c' r ctvkt' f g' uw' f gugo r g'ō q' gp' v'tō k'p'qu' f g' r tqf week>p.' xgp'v'c.' go r r'gq.' g'zr qt'v'ek'q'p'gu.' kō r qt'v'ek'q'p'gu' { 'uc'f qu'eqo gte'k'rgu.'f k'ht'g'p'ek'p'f q'rc'g'vcr c'f g'rc'r que'q'p'x'gt'v'k'k'k' cf "*2.2.1+ { "gn'f qd'k'g'p'q'f g'Eco dk'go qu'*2.2.2+0Gp'dcug'c'g'v'qu't'g'w'v'nc'f qu'ug't'guc'nc'rc'r g'tuk'v'g'pek'f g'rc'u' r tqdrgo cu'j kx>t'lequ'f gn'uge'v't'gp'gn'uki mq'ZZK0"

Gp' gn' uki w'k'p'v'g' cr ct'v'f q' ug' c'p'crk' c' gn' f gugo r g'ō q' f g' rcu' f kx'p'vcu' vgtō kpcrgu' cwqo qvtlegu'f w'c'p'v'g'gn'r gt'f'q'f q'dclq'gu'wf kq'c'v'cx² u'f g'uw'v'p'k'x'g'm'f g'r tqf week>p.'h'c'w'v'c'ek>p.' r qu'ek>p'gp'rc'e'Àr w'c'go r tgu'ct'k'c'ti gp'v'pc.'x'q'v'wō gp' { 'f k'x'gt'uk'h'lecek>p'f g'rcu'g'zr qt'v'ek'q'p'gu.' uc'f qu'eqo gte'k'rgu' { 'eq'v'g'p'k'f q'm'ec'nf g'mu'x'gi 'f'w'w'qu'*2.3+0C'r ctvkt'f g'guyg'gzco gp'ug'f g'v'cec' gn'lecu'f g'Vq { q'v'c'r qt'uw'v'g'w'v'nc'f qu'uw'r g't'k'q't'gu'gp'rc'o c { qt'r ct'v'g'f g'mu'c'ur g'v'qu'c'p'crk' cf qu'cn' eqo r ct'ct'ug'eq'p'gn't'g'v'q'f g'rcu'v'g'tō kpcrgu'cwqo qvtlegu'0Gm'ō c'tec'rc'g'z'egr ek'q'p'crk' cf 'f gn'lecu' f g'gu'wf kq' { 'rc'p'geg'uk'f cf 'f g'gp'v'g'p'f gt'mu'h'c'v'q't'gu's w'g'gzr r'ec'p'guyg'f gu'ctt'q'm'0"

Gn'Ecr 'fww'5'v'k'p'g'r qt'q'dl'g'v'x'q'tgeq'put'vkt'rc'incrustación internacional'f g'rc'h'k'rc'n' cti gp'v'pc'f g'VO E0Rctc'guq.'ug't'g'x'k'uc'e>>o q'guc'go r tgu'c'ug'k'p'ek>' { 'f gu'ctt'q'm>'v'cp'v'q'gp'uw'r c'f'u' f g'q'tki gp.'lcr >p.'eqo q'gp'gn't'g'v'q'f gn'ō w'pf q.'r tgu'v'p'f q'gur gek'cn'v'g'pek>p'c'rcu'ect'cev't'f'w'v'ecur' f g'uw'gust'v'gi k'c'go r tgu'ct'k'rc'n' i'q'd'cn' { 'cn'w'i ct's w'g'q'ew'r c'rc'h'k'rc'n'cti gp'v'pc'gp'uw'gust'w'v'w'c'

o wmpcekqpcr0'F g'gug'o qf q."ug'eqo kgp| c'nc'ugeek»p'cpcrk| cpf q"gn'qtli gp'f g'nc'go r tguac"gp" Lcr »p"gp'gn'o cteq'f gn'etgelo kgpvq'geqp»o leq'g'kpf wutkcn'f gn'r c¶µ*3.1+0'Nwgi q."ug'f gwcnc'p'f qu' eqo r qpgpvu'gugpekrgu'f g'nc'gutcvgi kc'go r tguactkn'f g'Vq{ qvc}*3.2+."hqu'ewcrgu'uqp'uw'ukungo c' f g'r tqf week»p"*Toyota Production System+ *3.2.1+ {"gn'o 2 vqf q"Vq{ qvc}*The Toyota Way+ *3.2.2+0'Guqu'grgo gpvqu'uqp'egpvcrgu'r ctc"gpvpgf gt'rcu'r ctvewctkf cf gu'f g'nc'hko c'f guf g'uw' qtli gp"{"f lgtqp'nwi ct"nc'r'rtqr ci cek»p'f g'uw'ukungo c'c'r ctvt'f gn'nc'o cf q"toyotismo, gn'ewcn' eqpf gpu»'i tcp'r ctvg'f g'hqu'eco dlqu's wg'ug'gucdcp'mgxc'p'q"cedq"gp'gn'ecr kcrkuo q'o wpf kn' gp"nc'f²ecf c'f g'3; 920' Cuko kuo q." gucu'ectcevgt¶µkcu"uqp"etwckrgu'r ctc"eqo r tgp'f gt'nc' gutcvgi kc'f g'Vq{ qvc'c'ti gpvkpc'f wcpvg'rcu'Ànko cu'f²ecf cu'rtkpek'cm gpvg'uw'r rcpkhecek»p" c' ncti q'r nc| q'{"uw'tgncck»p"eqp'r tqxggf qtgu'hqecrgu'0'

" Gp'gn'uki wkpvg'cr ctvcf q"ug'tgeqpustw'f g'nc'gvc'c'f g'etgelo kgpvq'cn'kpwtkqt'f g'"Lcr »p" nwg' q'f g'nc' KKI wgttc" O wpf kn'nc' gzc'cpuk»p'f gn'I twr q"Vq{ qvc" {"gn'kpetgo gpvq'f g'uw' gzc'qtcekqpgu" c'f kwpvqu" o gtecf qu'f gn'o wpf q" *3.3+0' Nwgi q." ug' uki wg" eqp"nc' hcug'f g' kpwtpcekqpcrk| cek»p'f g'nc'hko c'c'r ctvt'f g'nc'kpuvckek»p'f g'hkrcrgu'gp'f lgt gpvqu'r c¶µgu*3.4+0' Gp'guc'gvc'c'f g'gzc'cpuk»p'gp'o gtecf qu'go gti gpvqu'gu'ewcp'f q"Vq{ qvc'ug'kpuvckek»p'c'ti gpvkpc'0' C"tc¶µ'f g'gmq."ug'tgcrk| c'wpc'ectcevgtk| cek»p'f gn'tqn'f g'ecf c'uwduk'kctk" c'r ctvt'f gn'c'o q'f g' tcf kecek»p."gn'ect^a evgt'lw'¶µ leq."gn'kr q'f g'dkcp'r tqf wekf q."rcu'tc| qpgu'f g'nc'kpuvckek»p'{"gn'pkxgn' f g'r tqf week»p"gpvtg'422; {"423; 0'Ugi wkf q" c'guxq."ug'f guetkdg'nc'gvc'c'f g'eqpuqrf cek»p'f g' Vq{ qvc'eqo q'wpc'hko c'o wmpcekqpcn*3.5+c'r ctvt'f gn'cp^a nkuku'f g'nc'r tqf week»p'gp'rcu'f kwpvcu' tgi kppgu'f gn'o wpf q'{"nc'tgeqpustweek»p'f g'nc'tgf'f g'ceekqpkvcu'r tkpek'crgu'f g'nc'hko c'nc'wgi q' f g'uw'kpenwuk»p'gp'rcu'dqncu'f g'P wxc'¶µ qtni'{"Nqpf tgu'0'

" Rquvgtkqto gpvg." ug" cpcrk| c" gn' r tq{ gevq" Kppqxcck»p" Kpwtpcekqpcn' f g' Xgj ¶ewrcu' O wnc' tqr »ukq**KO X+nc'p| cf q'r qt'nc'go r tguac" c'pkxgn'i mqdcn'gp'4224*3.6+."gp'gn'ewcn'nc'hkrcn' cti gpvkpc'wkgp'wp'tqn'r tgr qpf gtc'pvg'0'Rqt'Ànko q."ug'cpcrk| c'gn'f gugo r g'o q'f g'nc'go r tguac"nc'wgi q' f g'nc'etkuku'f g'422: /422; *3.7+."eqo r ct^a pf qnc'eqp'gn'tguvq'f g'nc'hko cu'ugi Àp'uwu'kpi tguqu'{" r tqf week»p'i mqdcrgu'0'cf go^a u."ug'gzco kpc's w² 'tqn'waxlgtqp'rcu'f kwpvcu'tgi kppgu'f gn'o wpf q'cn' kpwtkqt'f g'nc'qti c'pk| cek»p'gp'ewcpvq'c'xgpvcu'{" r tqf week»p'nc'wgi q'f g'nc'etkuku'i mqdcn'0' "

Gn' Ecr ¶wrcu' 6" wkgp" eqo q" qdlgkxq" f gucttqmrct" e»o q" ug" eqphki wt»" nc' *incrustación nacional* f g'nc'hkrcn'f g'Vq{ qvc" gp" Cti gpvkpc'r ctc" gpvpgf gt" e»o q" ug" eqphqto »"nc' gzkquc" gutcvgi kc'f g'guc'go r tguac"gp'rcu'Ànko cu'f²ecf cu'0'F g'gug'o qf q."gp'guc'ugeek»p'ug'f gucttqmc." gp'r tko gt'nwi ct."nc'gutcvgi kc'f g'VO E'f g'tcf kecek»p'gp'Co² tlec'f gn'Uw'¶4.1+."f guvce^a pf qug'hqu' tqrgu's wg'Dtcukn'{"Cti gpvkpc'wkgp"gp'nc'tgi k»p'{"e»o q"guq'lo r cev»gp'gn'f gugo r g'o q'f g'nc'hkrcn'mqecr0'Nwgi q."ug'tgxkuc'gn'r tqeguq'f g'kpuvckek»p'f g'Vq{ qvc"gp" Cti gpvkpc'{"hqu'r tko gtqu' c'o qu'f g'r tqf week»p'gp'gn'r c¶µ*4.2+0'Gp'gn'uki wkpvg'cr ctvcf q"ug'f gucttqmc" e»o q'nc'hkrcn'mqecr0'

ug'kpugt»"gp'gn'r tq{ gevq"KO X."gn'ewcn'o ctec'wp'ucnq'ewcrkc'xq"gp'rc'r tqf week»p'f g'r kem'wr u'
gp'gn'r c'f'u"*4.3+{"e»o q'gn'o kuo q'hwg'glgewwcf q'gp'iqu'c° qu'uki wkepvgu.'ko r wucpf q'hwt vgo gpvg'
rc'r tqf week»p{"rcu'gzt vtcekppgu'f g'uwu'xgj 'f'wru"*4.4+0"

Ukp" go dcti q." c" r guct" c" guvg" ko r wuuq" kplekcn" rc" go r tguc" gpvt»" gp" wpc" hcug" f g"
guvpeco kgpvq'gpvtg'iqu'c° qu'4228{"4232's wg'hqi tc'ugt's wgdtef c'c'r ctvk'f g'pwgxcu'ecr celf cf gu"
i gtgpekrgu'iqecrgu."s wg'ug'f gvcnct'p"gp'f lej cu'r' a i kpcu"*4.5+0'Nqu't guwncf qu'f g"gu'g'vcdclq"
r wf kgtqp'xgtug'gp'iqu'Ànko qu'c° qu'f gn'r gt'f'q'q'guwfw kcf q."uwr gtcpf q't² eqtf u'f g'r tqf week»p{"
gzt vtcekppgu'c"r guct'f g"rc'hwt vge'eqvtceek»p'f gn'o gtecf q'cwqo qvqt'cti gp'v'p'q'gp'iqu'c° qu'
423: {"423; "*4.6+0'

Rqt'Ànko q."gp'gn'Ecr 'f'wru'7'ug'ngxc'c'ecdq'gn'cp' a nkuku'f g'rc'xk'pewrcek»p'f g'guvc'v'gto kpcn'
cwqo qv'k' {"uwu'r tqxggf qtgu'0Gp'r tko gt'nwi ct.'ug'gzt r'lect' a "ew' ngu'uqp'rcu'r tkpek' c'rgu'r ct'v'g'{"
r kgl' cu'ko r qtvcf cu'{"r tqf wekf cu'gp'gn'r c'f'u'{"e»o q'gu'v'j c'xctkcf q'gp'iqu'f qu'r tko gtqu'f gegpkqu"
f gn'uki nq"*5.1+0'Nwgi q."ug'gzt r'lect'gn'ukuvgo c'f g'f gucttqm'f g'r tqxggf qtgu'f g"VCUC"*5.2+0'C"
eqpv'p'wcek»p."ug'tgcrk' c"wp'cp' a nkuku'ci tgi cf q'uqdtg'iqu'r tqxggf qtgu'f g'cwqr ct'v'g'f g"Vq{ qvc"
tcf kcf qu'gp'Cti gp'v'pc."ercuk'le' a pf qm'qu'gp'v'gu'i t'cpf gu'i twr qu'c+O wnk'p'cek'p'crgu'lcr qpgucu."
d+O wnk'p'cek'p'crgu'p'q'lcr qpgucu'{"e+Nqecrgu"*5.3+0'Nwgi q."ug'tgcrk' c"wp'gzco gp'lpf k'k'f wcn'f g"
iqu'r tkpek' c'rgu'qpeg'r tqxggf qtgu'f g"Vq{ qvc"tcf kcf qu'gp"Cti gp'v'pc'0'Guvcu'go r tgucu'uqp'c'
F gpuq.'Vq{ qvc'Dquj qmw.'[c| cnk'F cpc.'O gvcnuc.'K'p'f wut'kcu'I w'k'k'Guvgdcp'Eqt'f gtq.'Xgpcv'no ."
Rq'ko gvcn"ETCO HUC" {"O ki qt" *5.4+0'Rqt' Ànko q."ug'j ct' a "wp' cp' a nkuku'i gpgtcn'uqdtg" rc"
gobranza" f g"VCUC" {"iqu'r tqeguqu'f g'upgrading" f g'uwu'r tqxggf qtgu'gp'dcug'c"nq'gzt wguvq"
gp'gn'ecr 'f'wru"*5.5+0'

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"
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CAPÍTULO 1

Estudios sobre empresas en la cadena de valor automotriz: perspectivas teóricas y analíticas

Introducción del capítulo

" Gnr t gugpvgecr ¶wru'vkpg'gn'qdlgkxq'f g'kvtqf wekt'gn'cdqtf clg'vg>tkeq.'ru'j gttco kpvcu" eqpegr wcrnu'f' 'qu'r t kpek crgu'cpvgegf gpvuf g'rc'kpxguki cekp0Cu¶'gp'r tko gtc'kpuwpeck'*1.1+" ug'gZR qp'gp'qu'cpvgegf gpvuf g'qu'guwf kqu'uqekrgu'f g'rc'geq'p'qo ¶'f' f'gnf gucttqm'geq'p'o keq." eco r qu'f g'guwf kq'gp'qu'ewcrnu'ug'kpu'gt'v'guc'vguku0Nwgi q.'ug'r t gugpv'wpq'f g'qu'cdqtf clgu' vg>tkeq/cpcn¶kequ'eqp'qu'ewcrnu'ug'v'cdclct' "gp'rc'kpxguki cekp."gn'gphqs wg'f g'ru'Ec'f gpcu' I mqdcrnu'f g'Xcmr'¶EI X+'*1.2+0'Gp'r ct vewrct.'ug'ug'o crct' s wg'ug'cf qr vct' s "gug'o cteq'r ctc'gn' cp' ruku'f g'wpc'ecf gpc'f g'xcmr'gp'r ct vewrct.'rc'rkf g'ctf c'r qt'Vq{ qv' Cti gp'kpc0Gn'guwf kq'f g' guc' hkrn'f g'rc'GO "Vq{ qv' O qvt' Eqtr qtcv'kq'ug' m'g'xct' s c'ecdq'c'r ct v' f'gn' gphqs wg'f g' *estrategias empresariales*'f g'rc'uqekrmi ¶'geq'p'o kec."f gucttqm'f q'gp'gn'uki vkpg'v'cr ct v'f q' *1.3+0"

Rquv'gt'kqto gp'v'g.'ug't'geq'p'ut'w'f gp'qu'r t kpek crgu'cpvgegf gpvuf gp'gn'guwf kq'f gn'ko r cev'q' f g'rc'kpxgtuk'p'Gz'v'cpl'g'c'F k'g'ev'gp'r c'¶gu'r g'k'f' tkequ'*1.4+."{ 'ru'r ct vewrct'k'f' cf' gu'f g'gug'v'k' q' f g'kpxgtuk'p'gp'rc'ecf gpc'cwqo qvt'k' 0Rqt'Anko q.'ug't'gr'x'cp'qu'guwf kqu'r t'gegf gpvuf uqdt'g'rc' gur'gek'k'cf' f'g'rc'u' hkr'rgu'f g'v'gto kpcrgu'cwqo qvt'kequ'f g'GO "lcr'q'p'guc'u'gp'gn'o w'p'f'q." f'k'k'p'i'w'k'p'f'q'ru'f g'rc'u'f g'GGWW'f'Gwt'qr'c'r t kpek crm'gp'v'g'*1.5+0'F'g'gug'o'q'f'q.'m'r' t'gug'p'v'f'q' gp'gug'ecr ¶wru'ug'p'v'ct' s'rc'u'dc'ugu'vg>tkeq/cpcn¶kecu'r ctc'gn'gz'co gp'f'g'wpc'ecf gpc'f'g'xcmr'c' r'ct'v' f'g'wpc'h'k'to'c'k'p'f'k'k'f'w'cn'c'v'g'p'f'k'p'f'q'rc'h'q'to'c'f'g'r'tq'f'weel'p'f'g'rc'ecf gpc'f'rc'i'q'd'g't'p'c'p' c' f'g'rc'go r t'guc'¶¶'gt.'{ 'cf'qr'v'p'f'q'gn'gz'co gp'f'g'rc'u'g'ut'cv'gi'kcu'go r t'guct'k'rgu'f'g'rc'uqekrmi ¶' geq'p'o kec0'

1.1 – Los estudios sociales de la economía y el desarrollo económico

Gp'qu'cwq'gt'gu'en' ulequ'f g'rc'u'Ek'g'pekcu'Uqek'rgu'ug'gpew'p'v'cp'cpv'gegf gpvuf g'wp' r tqh'w'p'f'q'k'p'v'g't'2'ur'qt'rc'u'ew'guk'q'p'gu'geq'p'o kec0'Guc'r t'g'q'ew'cek'p.'gp'r'ct'v'g.'ug'k'p'uet'k'd'¶'gp' wpc'eqpegr ek'p'k'p'v'gi' t'cf'c'f'g'rc'ek'g'pek'uqek'n's'wg'ug'f'gucttqm'r'ct'v'ew'rct'o'gp'v'g'gp'rc'v'cf'kek'p' crgo cpc0'4' Guc' xkuk'p' gpeq'p'v' s' pwo'gt'qu'qu'f'g'v'ce'v'q'gu'cn'k'p'v'g't'k'q't'f'g'rc'u' Uqekrmi ¶'c."

³⁴Nq'ew'cn'r'q'f'go'qu'g'p'eq'p'v'ct.'r' t kpek crm'gp'v'g.'gp'Y'gd'gt.'Ulo'o'gn'f'Uej'wo'r'g'v'g't'0C'uw'x'g'l'.ug'r'w'g'f'gp'j'c'm'ct'ek'g't'v'qu' r'w'p'v'qu'gp'eqo'Ap'eqp'qu'v'cdcl'qu's'wg'ug'g'v'cd'cp'r'tq'f'w'ek'p'f'q'gp'H'ic'pek.'f'q'p'f'g'F'w'n'j'g'lo'¶'F'w'n'j'g'lo'. '3; : 7+

eqpukf gtcpf q's wg'rc'Geappo ꞑ'c'ug'qewr cdc'f g'rcu'ceekppgu'logicas'o kgpvtcu's wg'rc'Uqekmqi ꞑ'c' fgdꞑ'c'qewr ctug'f g'mu'eqo r qt wco kgpvqu'j wo cpqu no lógicos."mq's wg' guvdrgeg"wp'c'tcf kecn' htqpvgtc' gr kungo qn>i kec' gpvgt' mu' f qu' eco r qu' *Rctgvq." 3; 67-0' Gp' gug' o kuo q' qtf gp' ug' eqo r tgpfg' rc' f kxkuk>p's wg' ug' r tqf wq' gp' Guvcf qu' Wpkl qu' gpvgt' guvcu' f kuekr rkpcu."rc' ewcn' vgtō kꞑctꞑ'c'r qt' kꞑukwewkꞑpcrk' ctug'c'r ct wkt' f' grntqnf gur ngi cf q'r qt' f' kxgtuqu'cecf² o lequ.'gpvtg'mu' s wg'ug'f guwcec'gnlꞑqt vgtō gtlꞑcpq'Vcraeqw'Rctuqpu.'hki wtc'egpvctnf g'rc'Uqekmqi ꞑ'c'f grluki mq'ZZ³⁵ *R² tgl.'422; +0

F g'gug'o qf q.'ewcpf q'rcu'vgtꞑ'ꞑ'cu'f g'Rctuqpu'eqo kgp| cp'c'gpvtct'gp'f gecf gpek'f gpvgt' f gr'no wꞑf q'cecf² o leq'c'hꞑcrgu'f g'rcu'c' q'u'92'ug'r tqf weg'gr'ōt gꞑceko kgpvq' 'f g'rc'Uqekmqi ꞑ'c' Geapp>o kec' *UG+0'Cu'ꞑ'gp'rc'f² ecf c'f g'3; : 2'wꞑ'i twr q'f g'kꞑxgukl cf qtgu'f g'Guvcf qu'Wpkl qu' kꞑlek>'wꞑ'o qxko kgpvq'r ctc'f g'ꞑꞑk'rc'Uqekmqi ꞑ'c'Geapp>o kec'eqo q'wꞑ'c'tco c'gur ge'ꞑ'kec'f g'rc' Uqekmqi ꞑ'c'Rq| cu.'4226+0'Gur ge'ꞑ'keco gꞑvg.'c'r ct wkt' f' gr'vz vq'f g'I tꝼpꝼxgwg't*3; : 7+'Acción económica y estructura social: el problema de la incrustación' "ug'eqo kgp| c'c'kꝼukwewkꝼpcrk' ct' wꝼc'eqttkꝼpv'g>tkec.'f gꝼqo kꝼcf c'P wꝼxc'Uqekmqi ꝼc'Geapp>o kec' *P UG+0'F kꝼj q'cwꝼt'r rꝼpꝼvc.' tꝼvqo cꝼf q'c'Mctnl'Rqꝼrc'p' { k'3; 66+.'wꝼc'f g'rcu'vꝼuku'o^a u'ekcf cu' { 'f kꝼewkꝼf cu'f gꝼvtq'f gr'eco r q'< rc'geappo ꝼc'guv' *incrustada* gꝼ'rc'uqekgf cf.'hq'ewcn'lwꝼr qꝼg's wg'gu'kꝼgꝼekꝼf kꝼng'f g'rcu't gꝼekꝼppgu' uqekrgu'gp'rcu'ewcrgu'guv' ^a kꝼo gꝼuc'0"

Rctc'guxqu'hwꝼf cf qtgu'f g'rc'P UG.'rc'ekꝼpek'geapp>o kec'glꝼteꝼꝼ'gp'Guvcf qu'Wpkl qu'wꝼ' o qꝼqr qꝼkq'udt g'gug'eco r q'f g'kꝼxgukl cek>p.'r qt'mq's wg'gr'r tko gt'r cuq'eqpukuk>'gp'tgꝼrk' ct' wꝼc' hwꝼt v'g' et'ꝼ'kec' f g' mu' r quwꝼcf qu' gꝼꝼpek'rgu' f g' rc' geappo ꝼc' pꝼqꝼeꝼf uꝼec' tꝼgur geꝼv' cꝼn' eqo r qt wco kgpvq'geapp>o leq'f g'rcu'kꝼf kꝼkꝼf wꝼu.' { 'gꝼvꝼdrgeg't'cu'ꝼ'ꝼ'ꝼ'ꝼ' kꝼgu'f g'rc'f kꝼekꝼr rkꝼc'0'Guvcu' kꝼxgukl cf qtgu'cti wo gꝼvꝼtqꝼ's wg'gtc'et wꝼekꝼn'cdtk'gr'f gꝼdc'v'cecf² o leq'ceꝼgꝼec'f g'rc'geappo ꝼc' r ctc'kꝼꝼenkt'wꝼc'f' gꝼwꝼkꝼc'r gꝼur ge'vꝼc'uqekꝼn's wg'w괁k괁tc'eqo q'egꝼvtq'rc'k괁v괁tceek>p'f g'r g괁u괁pcu' t괁c괁rgu.'gp'xgl' f gr'eq괁l괁v괁q'f g'uw괁 w괁v괁qu'h괁to c괁rgu'f g괁cttq괁m괁f qu'r qt'mu'geappo k괁vcu'eqo q' hw괁f co g괁vq'f g'uw괁f k괁ek괁r rk괁c' *Rq| cu.'4226+0"

Guvcu' r quw괁cf qu' ug' qtk괁v괁p.' r t괁pek괁 cm g괁vg.' j cek' ek괁t괁cu' ^a t괁cu' v괁o ^a w괁cu' hw괁f co g괁v괁rgu'gp'rcu's wg'ug'f g괁cttq괁m'rc'UG0'Nc'f tko g괁c'f g'g괁cu't g괁k괁g'c'rc'*teoría de la acción*0' Gp'rc'geappo 괁c'*mainstream* rc'k괁f g괁c'f g'rc'tce괁k괁pcrk' cf 'k괁f k괁k괁 w괁n'guv' ^a eqo r t괁g괁f k괁c'f g괁vtq'f g'

eq괁v괁w괁dc'hw괁t v괁o g괁vg' gr'no q괁qr q괁kq'k괁v괁rgew괁n's wg'v괁p'괁'괁'mu'geappo k괁vcu'udt g'rcu'ew괁v괁k괁ppgu'geapp>o kecu' *R괁t g괁.'422; +0'F w괁nj g괁o "eqpukf g괁cdc's wg'rc'q괁dc'f g'rcu'geappo k괁vcu'e괁f u괁equ'v괁p'괁'gr'f g괁g괁v괁'k괁u괁r g괁c괁d괁g'f g'uw' qtk괁v괁cel>p' k괁f k괁k괁 w괁rk괁c.' { c' s wg' k괁v괁p괁ct' f g괁f w괁k' ng' gu'r ctc' ew괁rs w괁gt' u괁g괁vt' f g' mu' h괁p>o g괁qu' uqekrgu.' g괁z v괁c' {² p괁f q괁rcu'f g'rcu'r quw괁cf qu'udt g'rc'p괁w괁c괁rg' c'j wo c괁c'g괁c'w괁'c괁du괁n괁w괁'g괁t괁t.' { c's wg'gr'j qo dtg'gu'w괁'c괁p괁o c괁n' uqek괁n' { 'gu'rc'uqekgf cf 'rc's wg'et g괁'w괁p괁w괁c괁rg' c' *D괁g괁 g괁k괁.'4229+0'³⁵Eqo q'ug'q괁du괁g괁c'gp'uw'rk괁d괁q'udt g' "La estructura de la acción social". "Rctuqpu"*3; 59+r' t괁qr q괁괁'c괁'c괁' q' ct'rc' uw괁 t괁go ce괁'괁'f g'rc'Geappo 괁c'udt g'gr'eco r q'f gr'ōx괁m괁t'ō' k괁v괁cu's wg'rc'uw괁 t괁go ce괁'괁'f g'rc'Uqekmqi 괁c't괁g괁k괁 괁c'udt g' cs w괁gr'f g'rcu'ōx괁m괁t괁gu'ō' *R괁t g괁.'422; +0

mq" s wg" f gpqo kpcp" *individualismo metodológico*, "pvo co gpvg tgrckqpcf q" c" r" tcf lek»p" wkrkctkuc0Gri'o kuo q"ug"f gur tgpf g"f g"r"pqek»p"f g"*homo-economicus*."cvtkdvkf c" c" rqu"cwqrgu" eni ulequ" f g" rru"ekgpeku"geqp»o lecu" *Tlectf q. "3: 39=Uo kj . '3998+ 's wg"eqpukf gtc"cnlgt" j wo cpq" eqo q"wp"ci gpvg"tcekqpcn" { "gi q"pvc."gpvgpf kqpf q" s wg"uki wg"wp"eqo r qt wco kqpvq" b czko k cf qt" f g" dgpghlekqu" o cvgtkrgu" kpf kxf wrgu." ukp" ugpvo kqpvqu" pk' xcmqtgu" o qtcrgu0⁶" Cn' gko kpc" rru" tgrckqpgu" uqekrgu" f gni" cp" ruku." ug" eqpenw\ g" s wg" r" eqo r gvgpek" f gvgto kpc" rru" v to kqqu" f g" kpvgtco dkq" f g" o cpgtc" wni" s wg" pq" r wgf gp" ugt" o cplr wrcf qu" r qt" rru" kpf kxf wqu0⁷" Rctc" rru" uqek»mi qu"geqp»o lequ." gp" eco dkq." rru" r tghgtgpeku" { " rru" ceekqpgu" f g" rru" kpf kxf wqu" pq" guv⁸ p" pgeguclko gpvg" cnkpgcf qu" { ." gp" ghgevg. " o wej qu" f g" rru" eqo r qt wco kqpvqu" pq" uqp" pk' kpvgtgucf qu." pk'qr qt wplwcu0Gp" guvg" ugpvkf q. " ugi Ap' Dqwf kgw" *4224+." guvc" ceek»p" pq" gu" tcekqpcn" ukpq" s wg" gu" *razonable*." gu" f gek. " s wg" f gr gpf g" f g" uw" eqpvz vq" uqekr0F g" gmq" ug" f gur tgpf g" s wg" rru" i wuqu" pq" uqp" hlkqu" pk' wplxgtucrgu." ukpq" s wg" f gr gpf gp" f gni" eqpvz vq" j kuw" tleq" { " uqekr0⁸" Eqo q" eqpvtr ct vkf c" cnl kpf kxf wruo q" b gvf qn»i leq. " I tcpqxgwt" *3; : 7+." uqukpgp<""

"

Nqu"cevqtgu"pq"ug"eqo r qt wcp"q"vqo cp" f gekkqpgu"eqo q" vqo qu"chwgtc" f g" wp" eqpvz vq" uqekn" pk" vco r qeq" cf j lgtgp" eqo q" guercxu" c" wp" i wkp" guetkq" r ctc" gmq" r qt" rru" kpvgtugeek»p" eqpetgv" f g" rru" ecvgi qt" pu" uqekrgu" s wg" qewr cp0Gp" hwi ct" f g" gmq. " uuu" guhwgt| qu" r qt" rru" tct" vpc" ceek»p" kpvpekpccn" guv⁹ p" kpetwrcf cu" *embedded+ gp" rru" ukngo cu" eqpetgvqu" f g" tgrckqpgu" uqekrgu" gzkuvgpvu" *I tcpqxgwt. "3; : 7<6: 9+0"

"

Rqt" qvtq" rcf q. " r" tcf lek»p" eni ulec" { " pgeen¹ ulec" f g" r" Geqpqo "c" uqukpgp" s wg" rru" cevqtgu" f kur qpgp" f g" kphqto cek»p" r gthgevc" { " s wg" r" o kuo c" gu" rkdgt" *Mpi j v. "3; 43+0Ukp" go dcti q. " r ctc" rru" UG" rru" kpf kxf wqu" pq" uqp" ecr cegu" f g" r" tngxg" vqf qu" rru" tguwrcf qu" f g" uuu" ceekqpgu. " eqo q" vco r qeq" f kur qpgp" f g" kphqto cek»p" r gthgevc" cpvgu" f g" cewct" *I tcpqxgwt. "3; : 7+0Ugi Ap' Dgengt v" *4225+." rru" ceek»p" geqp»o lec" ug" ukvAc" gp" eqpvz vqu" f g" kpegt vkf wo dtg. " uk' dlgp" rru" cevqtgu" r tqewt cp" o czko k cf ct" uw" dgpghlekq. " cpvg" rru" kpecr cekf cf " f g" kf gp" wlect" rru" tgrck»p" »r vo c" o gf kqu" hkpgu" ug" cr q{ cp" gp" f kur qukxqu" uqekrgu" eqo q" rru" twkpc" { " rru" tgxkuk»p" eqpuwcpvg" f g" rru" qdlgvkxqu. " gp" hwpek»p" f g" rru" kpvtr t gceek»p" s wg" j cegp" f gni" eqpvz vq0"

³⁶C" uw" xgl . " guvg" cdqtf clg" hwg" cf qr wcf q" r qt" rru" Geqpqo "c" r ctc" cpcrk ct" qvtqu" hgp»o gpqu" uqekrgu0Rqt" glgo r rru. " Dgengt" *3; ; 5+ f gur rki c" rru" vgt" "c" f g" rru" ceek»p" tcekqpcn" r gtu" kpeqr qtcpf q" qvtcu" xctkdrgu" eqo q" cekwvf gu. " r tghgtgpeku. " e^a rewqu. " chkt o cpf q" s wg" rru" ceek»p" tcekqpcn" gu" rru" o glqt" dcug" r ctc" guwvf kct" ekgpeku" uqekrgu0

³⁷Guv" xkuk»p" s wg" uwr qpg" c" rru" tgrckqpgu" uqekrgu" wp" lo r gf ko gpvq" r ctc" gni" f guctt qmq" f g" rru" o gtecf qu" j c" ukf q" hwgt vgo gpvg" ewgukqpcf c" f guf g" rru" r tqr k" Geqpqo "c" 0Gri" gphjs wg" kpukswekqpcrkuc. " r qt" glgo r rru. " dwue» uwr gtct" guqu" rrp kgu" c" txc² u" f gni" eqpegr vq" f g" rru" *costos de transacción* ew' c" tgf week»p" ugt" "c" gni" qdlgvkxq" f g" rru" kpukswekqpgu" f gni" ecr kcrkuo q" *P qt vj . "3; ; 2+0"

³⁸C" uw" xgl . " I tcpqxgwt" *3; : 7+ pq" eqpukf gtc" s wg" j c{ c" s wg" f guectvt" gni" eqpegr vq" f g" ceek»p" tcekqpcn" r gtu. " ugi Ap' ² uvg. " pq" gu" gzenwukxco gpvg" geqp»o lec0Ug" r wgf gp" dwuct" o czko k cf ct" f kwpvqu" ecr kcrkuo *uqekdkkf cf . " guvc wru. " cr tqdcel»p" { " r qf gt+0"

C "gmq"ug"uwo c"s wg"gn'tqn'f gn'Guvf q"wo dlē p"ug"gpewgpvc"o w{ "f kmkf q"gp"rc"vgt"fc" geqp»o kec."o kgpvcu"s wg."r qt"gn'eqvtctkq."r ctc"rc"UG."gn'Guvf q"ewo r ng"wp"tqn'egpvcn'gp"rc" hqto cek»p{" f gucttqm'f g'hqu'b gtecf qu0F g'guc'hqto c.'rc'UG'tcdclc'rc'tgr t gugpcek»p'f kp^a o kec" f g" rc" geqpqo "fc" {" gn' ugui q" j kw»tleq0' Gu" f gekl." tgr quc" uqdtg" wpc" tgr t gugpcek»p" hwpf co gpvcw gpvg'f kp^a o kec."f qpf g"rc"gz kugpek" f g'kpukwekqpgu"geqp»o kecu"gur ge"kecu"pq" cr ctgeg"eqo q"cri q"fcf q."ukpq"s wg"o^a u"dlgp"uqp"gn't guwncf q" f g'wp'hgp»o gpq'r tqdrgo cvk cf q" f guf g'wpc'r gtur gevxc"j kw»tlek"Rgtg|. "422; +0"

Cuko kuo q."co dcu'f kuekr nkcpcrc'k cp'mu'mercados f g'hqto c'f khtgpvg0Rctc'rc"vgt"fc" geqp»o kec" *mainstream*, mu" o kuo qu" gu^a p" hqto cf qu" r qt" r tqf wvqtgu" {" equwo kf qtgu" cvqo k cf qu's wg'eqphk wcp'wpc'eqo r gvpek'r gthgevc0Gp'eco dlq."rc'UG'r t guc"gur gekn'kpvgt²u" c'rc'f kwtkdwek»p'f g'r qf gt'f gpvt'f gn' b gtecf q."{ c'ugc'r qt'gn'rcf q'f g'rc'ōqht wō."eqo q'r qt'gn'f g" rc'ōf go cpf cō0Nc'uqekmqi "fc"geqp»o kec'dwue»"kt"o^a u'cm' f g'rc'kpet wucek»p'kpukwekqpcn'{" mu" cewgtf qu'uqekngu's wg'eqpmgxcp'rc"gz kugpek" f gn' b gtecf q."{ "ug'r tqr wuq'cdtk'rc'eclc'pgi tc'f gn' kpvgtco dlq."rc'eqo r gvpek"{" rc'r tqf week»p"Hi uvgk"{" F cwtg."4234+0"

Dclq"guv"r gtur gevxc" f g"cp^a rkuku."ug"ghcwk c"rc"ko r tgekuk»p" f g"rc"t gceke»p"gpvt g"rcu" ceekqpgu" f g"rcu" go r t gucu" {" uwu" t guwncf qu." gp" mu" v² to kpqu" r tqr wguqu" r qt" mu" o qf grqu" geqp»o kequ."f qpf g"rc"o kuo c"ug"r t gugpvc"eqo q"cwqo^a vlec" g"kpucpv^a pgc0'Gn'x'pewu" gpvt g" ceek»p" {" t guwncf q"wo dlē p"gu"ewgukqpcf q"gp" gn'ugpvk'f q" f g"s wg"mu" *managers*"pq"r wgf gp" kf gpwlect'f g'b cpgtc'eqphkdr'rcu't gceekqpgu's wg'r tqf wegp"mu't guwncf qu's wg'qdugt xcp."ukgpf q" kpecr cegu'f g'i gpgtct'rcu't gur wguu'cr tqr kcf cu"“*la complejidad de los eventos en las grandes empresas hace que la asignación de las causas a los mismos sea extremadamente problemática*” Hi uvgk"{" F cwdgt."3; ; <. 5+0"

Lxwco gpvg.'rc'r qukdktf cf'f g'kpi tguet'gp'wp^a tgc's wg'ug'r t gugpvcde'j qukr'c'rc'Uqekmqi "fc" {" qvtcu'elgpeku'uqekngu" {" f kur wctrg"wp"nwi ct"gp"rc"kpvt r t gceke»p" {" cp^a rkuku'f g"qdlgqu" {" r tqeguqu'geqp»o kequ'uki pkle»"wp'i tcp'cxcepg'gp'rc'equuqkf cek»p'f g'rc'uwdf kuekr nkcpc0Cf go^a u." nwi q" f g" rc" h"fc" f kucpek" s wg"o cpwxkgtq" Geqpqo "fc" {" Uqekmqi "fc" gpvt g" gn' r gt'qf q" f g" gpvt gi wttcu" {" mu" c^o qu"ugvpc."rc" P UG"tgcxk»"gn'f k^a mji q" f kuekr nkcpc."gp"r ct vewrt."eqp"rc" geqpqo "fc" *heterodoxa*"Ecuvgmpk"{" Utcwu."4234+0"

Uk"go dci q."c'r guct'f gn' b gpekqpcf q'f kxqtela'gpvt g'guv'f kuekr nkcpc'f wcpvg'i tcp'r ctvg" f gn'Uki m'Z.Z.'gp'Co² tlec'Nc'kpc'r tqur gt»"wpc'r tqn'kec'gucwgn'f g'ekpvkuc'uqekngu'f gf kecf qu"

³⁹Crit'gur gevq."ugi Àp'Ecuvgmpk"{" Utcwu"4234<,+""*lo original y provocador de la propuesta de la SE no radica en sus enfoques teóricos metodológicos, ni sus perspectivas epistemológicas o los grandes problemas sociales que presenta –que ya los clásicos de la Sociología y la Economía habían planteado oportunamente–, sino su intromisión en un campo del saber que en los setenta y ochenta estaba hegemonizado por la economía ortodoxa.*”

c"guwf lct "mqu"vgo cu"geq»o lequ"xkpewrf qu"cn*desarrollo*³: "gp"mqu'r c"lgu'f g"r"tgi k»p0Ug"tvc" f gn'Gut wewtcrkuo q"Ncvkqco gtlecpq"s wg"pceg"r ctvkt "f g"mqu'r tqr wguwu'tgcrk cf cu'r qt "TcÀr' Rtgdkuej "f guf g"gn'uwti ko kgpvq" f g"r"Eqo kuk»p"Geq»o kec"r ctc"Co ²tlec"Ncvkpc" { "gn'Ectkdg" *EGRCN+"gp"3; 6: 0: "Gp"guwg"pqxgf quq"eqtr wu"v»tleq"ug"gpewgpvtcp"mqu'enf ulequ"eqpegr vqu" gut wewtcrkuwu" f g"centro-periferia."heterogeneidad productiva" f g"mqu'r c"lgu'r gtkt²tlequ"q"r" vgu'f gn'deterioro secular"de los términos de intercambio"*Dkneuj qy un{ . '422; =Ugttcpk'4234-0' C"uw'xgl . "f lej c"guewgr"ukt xk" f g"kpur ktcel»p"r ctc"qwtc"eqttkpv" f g"tgngxcpekc"gp"r"2 r qec. "r" Vgqt" f g"r" F gr gpf gpekc. "r"ewcn'guwf k» c"mqu'r c"lgu'f g"Co ²tlec"Ncvkpc"eqpek² pf qmqu"eqo q" gut wewtcu" f gr gpf kpvu"r qt "guvct"kpugtvcu"gp"tgrecqpgu" f g" f qo kpekc»p/ uwdqt f kpekc»p"gp"gn' ukngo c"ecr kcrkuc"kpvt pcekqpcn" Ectf quq. '3; 92-0²"

F lej c"vctf klc»p"ug"o cpwxq"gp"r"EGRCN"j cuvc"r" f²ecf c" f g"3; : 2. "ewcpf q. "cpvg" gn' cxcpeg" f g" mqu" r qm"lecu" pgqrkdgtcrqu" gp" r" tgi k»p" { "mqu" etkuku" geq»o lecu" tgewttgpvqu. " r" kpurkwek»p"eqo gp| »"c"tgcrk ct"o ^a u'guwf kqu"uqdtg"guvcdkcf cf "o cetqgeq»o kec."uwdtc { cpf q"r" vctuegpf gpekc" f gn'qt f gp" hkuccu'Cu" | "ug"tgxku»" r" kpvt xgpekc»p" f gn'Guvf q"gp"r"geq»o " f { "ug" f ghgp f k»"wpc"o c { qt "cr gt wtc"eqo gtekn"gpvt g"qvtqu"eco dkqu"gp"uwu"ghqs wgu"*Dkneuj qy un{ . " 422; +0³"

Gp"guwg"eqpvz vq. "gp"mqu" f²ecf cu" f g"3; : 2" { "3; ; 2. "wp"pwgxq"eco r q" f g"guwf kq" f g"r" geq»o " f { "uwti g" c" r ctvkt " f g"mqu" s wg"ug" f gpqo k»" r" P wgx" Uqekqmi " f { "gn'F gucttqm" *P UF + "Ugttcpk" 4234-0 C wqtgu" eqo q" Co uf gp. " Gxcpu. " Uej pgkf gt. " Ukrx" { " E j kddgt. " gpvt g" qvtqu. " tgewr gtc p" r" h w e" | g t c" | p g c" f g" k p x g u k i c e k » p " c d k g t v " g p " m q u " v g o r t c p q u " : 8 2 " r q t " m q u " u e k » m i q u " { " geq»o kuc u" f gn' f gucttqm" r" v k p q c o g t l e c p q u . " i g p g t c p f q " w p " p w g x q " g u r c e k q " f g " g p e w g p v t q " r c t c "

³: "Guv"v to kq"r tgugv" f kxgtuqu"crepegu" { "uki pklecf qu"ugi Àp"r"eqttkpv"v»tlec" { "gn'r gt"qf q"j k»vtleq" f gn's wg" ug"tvcg0'Gp"guwg"tcdclq"ug"eqpukf gtc"r" f ghkpekc»p"o ^a u"co r rke" f g"desarrollo económico."vqo cf c"r qt "Ecuvgrpk" *4229+. "gu'f gek. "cs wgr" s wg"mqu" f ghkpg"eqo q"gn'r tqeguq"r qt "gn'ewcn'ug"i gpgtc"gn'et geko kgpvq"uquvpkf q" f g"mqu"hwgt| cu" r tqf wvkc u. "co r rkpq" q"r"ecr cefk cf "vgepqr»i kec" { "r tqf wvkc"kpucrf c"gp"wpc"geq»o " f { "pcekqpcn"gp"uw'eqplwpvq" { . "r qt "vcpvq. "o glqtcpf q"mqu"pkxgru" f g"xkf c" f g"r" r qdrck»p0

³: "Guv"eqttkpv"uwti g"eqo q"wp"eqtr wu"v»tleq" gp"Co ²tlec"Ncvkpc. "tghqto wrcpf q"o wej qu" f g"mqu"r quwrcf qu" f g"r" geq»o " f { "gn' f gucttqm" qtki kpcf c" c" hkpgu" f g"mqu"ø20Lwpvq" c" Rtgdkuej . "uwti gp"vqf qu"mqu"r tko gtu"cwqtgu" f g"r" EGRCN<Hwv f q. "O gf kpc"Gej excttk. "P q { qm"Xc| s wgl . "Cj wo cf c. "Rkpvq" { "Uwngn" *Dkneuj qy un{ . '422; +0"

⁴²"Gp"guv"guewgr" f g"r" gpuc" kpvq"ug"j emdcp" f qu"xtkpvvqu. "o ctecf co gpv" f kgt gpvqu"gpvt g"u" | "s wg"r wgf gp"ugt" f kxf kf cu"gpvt g"o ctzkuc" *F qu"Ucpvqu. "I twpgt" Hicpm"Uco k"Co k»p" { "tghqto kuc" *Ectf quq. "Hcrgwq. "Uwngn"Rc| . " Hwv f q-0

⁴³"Culo kuo q. "c"r ctvkt " f gn'kpi tguq" f g" Hclp| { ndgt "gp"r"EGRCN"gp"3; : 5. "ug"tgcrk c" wpc"tgxkuk»p" f gn'gut wewtcrkuo q" { "ug" f c" kplekq" c" mqu" s wg"ug"eqpgeq"eqo q"r" gvr c" f gn'pqqgut wewtcrkuo q" *Dkneuj qy un{ . '422; +0'Gp"grc. "mqu"cp" ruku" v»tlequ"ghcwk ctqp"gn'r tqi tguq"v epleq"dcucf q"gp"gn'eqpkeo kpvq"gp"dcug" c"guwf kqu"pgquj wo r gvgtkcpqu"uqdtg"r" t g x q n w e k » p " f g " r u " v g e p q m i " f u " f g " r " k p h q t o c e k » p . " r " d k q v e p q m i " f { " r " e t g c e k » p " f g " U k n g o c u " P c e k q p c r g u " f g " k p p q x c e k » p " *U P K 0 C " u w ' x g l . " u g " r g t f k » " r " e g p v t c r k f c f " f g " r " o c p w h e w t c . " i c p c p f q " k o r q t v c p e k " r u " e c r c e k f c f g u " f g " e q p q e k o k g p v q " g p " w p c " b c { q t " f k x g t u k h e c e k » p " t q f w e v k c o F k e j q " p w g x q " g p h q s w g " h u " r g t o k k » c " g u q u " c w q t g u " b c p v g p t " w p " f k m i q " e q p " m q u " i q d l g t p q u " s w g " g u v c d p " n g x c p f q " c " e c d q " t g h q t o c u " g u t w e w t c r g u " k p u r k t c f c u " g p " g n " o E q p u g p u q " f g " Y c u j k p i v q p o " *Dkneuj qy un{ . '422; +0"

r gpuct "gn'tqrf g'iqu'cevqt gu. 'rcu't g'rekqpgu'ulekngu" { "iqu'o qf grnu'f g'lpvgtxgpek»p" guvcvri'gp'rc" g'zr rkecek»p'f g'n'uwdf gucttqmj" *Ecuvgmcpk { "Utcwuu. '4234+0⁴

Gp'r tko gt'hw ct. 'guqu'cwqt gu'r rcpvgtqp'eco dkt'rc'hqto c'f g'tc| qpco kpvq'f g'n'guwf kq" f g'n'f gucttqmj"geqp»o leq0Gp'r crcdtcu'f g'Crkeg'Co uf gp" *4234+."

Cr tgp'f g' c" f gucttqmctug" tgs wkg'tg" wp" eco dlq" f g' eqphkt" gp" vgt'cu' f g'f vevkcu" r wcu" c" eqphkt" gp" g'zr g'lkpcku'lpf vevkcu'f g'rc'xkf c't g'cn0Uk'rcu'geqpqo 'cu'go gti g'p'v'xcp'c'ugi wk'et'gekgpf q.'uk'hqu'r c'f'gu" o gpqu'f gucttqm'f qu'xcp'c'cwo gpvt'uw'r tqf week»p. 'pgegukcp'wpc'o g'p'v'tgdgrf g.'wp'cm c'f'g'ugf lek»p" { "wpc'tg'xq'wlek»p'gp'gn'tc| qpco kpvq'udtg'gn'f gucttqmj"geqp»o leq0⁵"

Cf go ^a u. "f lej qu" vgt'lequ'f glctqp" f g' rcf q. "vcpq" rc" eqpegr ek»p" *fordista-keynesiana*" r tqr k' f g'rcu' geqpqo 'cu' kpf wutk'rk cf cu' f g' o gtecf q" f g'n'egpvtq. "eqo q" rc" o cvtk" *centro-periferia*" f g'n'gut wewt'cuo q'rc'w'p'co g'lkcpq" { "r wukgtqp" gur gekn'cvgpek»p" gp'rcu'gur ge'p'lecu" hqto cu's wg'cf s wkg'tg"rc"t'g'rek»p" gpvt'g'Guvcf q" { "go r t'guctkqu'r ctc" gpv'p'f g't'qu'ugpf gtqu'f g'n' *u'd'f gucttqmj"geqp»o leq" *Ugttcpk'4234+0Uw'b c { qt'r t'gqewr cek»p" guw'xq'gp'c'p'rk ct'f k'k'p'vcu" g'zr g'lkpcku'f g'f gucttqmj"geqp»o leq" gpvt'g'r c'f'gu'f g'lpf wutk'rk cek»p" vct'f'c'f'g'rc" r g't'k'g'tc. " r ctc" g'p'epvtct" r ct'w'w'ct'kf cf gu' s wg" r gto k'k'g'tcp" g'zr r'lect" r qt" s w² " r c'f'gu" eqp" öuko k'rt'guö" ect'cev't'p'lecu" g'ut wewt'c'rgu'f gur ngi ctqp" r t'q'egu'qu'f g'f gucttqmj"vcp'f k'f'p' k'rgu" { "eqp't'guw'ncf qu" vcp'f k'g't'gp'v'g⁶"

Rqt "Änko q. 'qvtqu'guwf kqu'f g'rc'P'UG'c'hk'p'rgu'f g'uki nq'r cucf q'ug'g'pecti ctqp'f g't'gucnct" rc"ko r q't'v'pek'f g'rc"qti c'p'k' cek»p'ulekcn'gp" r t'q'egu'qu'f g'f gucttqmj"geqp»o leq0'Guvcu'cwqt gu' f guvecp"rc"t'g'ng'x'c'pek'f g'n'gz'co gp" f g'rcu'ect'cev't'p'lecu" r ct'w'w'ct'gu'f g'ecf c'o gtecf q" r ctc" gpv'p'f g't'qu'r t'q'egu'qu'f g'²z'kq"geqp»o leq. "et'k'k'ec'p'f q'rc"kf gc'f g'o gtecf qu'w'p'k'g'tuc'rgu'f g'rc" geqpqo 'c' pgqen'ulec" *Dki i ctv." 4223<' 33+0' Gp" r ct'w'w'ct. " guvcu' v'cdclqu" j cp" t'g'cn'k' cf q" eqp't'k'w'ek'q'p'g'u'gp"e»o q'rcu'ect'cev't'p'lecu" r ct'w'w'ct'gu'f g'cni w'p'cu'ulek'g'f cf gu'j cp"o q'f g'cf q" u'w'u'qti c'p'k' cek'q'p'g'u. 'gpvt'g'rcu's wg'ug'f guvecp'uwu'go r t'guc'u'r t'k'x'cf cu. { "e»o q'²u'cu'j cp'lp'h'm'k'f q" gp"uwu'vc { gev't'k'cu"geqp»o lecu" *Dgco kuj " { "Dki i ctv."4228="Dki i ctv" { "I wkn'p."3; ; ; ."3; ; ; =" I wkn'p."4225="J co k'k'p" { "Dki i ctv."3; ; : +0C'uw'x'g|. "guvcu'cwqt gu'j cp'et'k'k'ec'f q'c'qvt'cu'v'g'qt'cu"

⁴⁴G'n'lp'leq'f g'guvc'eq't'l'p'v'g'vgt'lec'r w'g'f g'uk'w'ct'ug'gp'gn'r t'g'ew'ut'ct'v'p'w'q'f g'Co uf gp"*3; 9; +u'dtg'gn'f gucttqmj" geqp»o leq'f g'V'c'k' cp's w'g'hw'gi q'lp'ur k't"cn'v'cdclq'f g'L'q'j puqp"*3; : 4+u'dtg'gn'lecu'lc'r qp²u'c'v'cx²u'f g'uw'Estado desarrollista0'

⁴⁵R'ctc'r t'q'hw'p'f k' ct'cegtec'f g'n't'geq't'k'f q'f g'n'r g'p'uc'o k'p'v'q'f g'Co uf gp"eq'puw'nc't'G'x'cpu"*4243+0'

⁴⁶Cu'f'guvcu'cwqt gu'r wukgtqp'gur gekn'cvgpek»p'gp'rcu'r ct'w'w'ct'gu'hqto cu's wg'cf s wkg'tg'rc'*acción económica*"eqo q' t'guw'nc'f q'f g'rcu't'g'rek'q'p'g'u'gpvt'g'Guvcf q'ecr k'cn'gpvt'g'ngi t'ct'c'w'q'p'qo 'c'g'guvcvri'*versus* uwewo dkt'c'rc'r g'p'v'g'cel»p" f g'iqu'lp'v'gt'gugu'go r t'guctkqu'gp'gn'hw'pek'q'p'co k'p'v'q'f g'rc'dw'q'et'cek'guvcvri'*Ugttcpk'4234+0R'ctc'g'm'q'. t'g'ew'gt'cp'rcu' p'q'ek'q'p'g'g'qo ct'z'k'cu'f g'rc'*autonomía relativa*"f g'n'Guvcf q" { "rcu'y g'd'g't'k'p'cu't'gur gev'q'c'rc"ko r q't'v'pek'f g'rcu' *capacidades burocráticas estatales*0'Gu'f gek't. "ug'f glc'f g'r gpuct'cn'Guvcf q"eqo q'gur glq'f g'rc'g'k'g'f q'o k'p'c'p'v'g. " t'g'v'qo c'p'f q'gn'ef'uleq'f g'd'cv'g'o ct'z'k'cu'f g'rcu'c'o qu'-82/02'gpvt'g'O k'k'k'c'p'f { "R'q'w'rc'p'v' cu0"

f gnlf gucttqm "geqp»o leq"j gvgtqf qz cu'cnluquvpgt 's wg'guc'u'ug'dcucp"gp'cni Àp"òhcevt "et ¶leqö⁴⁷"
{."r qt"gn'eqpvtctkq."r rcpvgcp" s wg"uqp" wpc"o wnk rdkf cf "f g" hcevt gu"nqu" s wg" kpvgt xkgp gp" { "nqu"
r tqeguqu" geqp»o lequ" o "a u" gzkququ" f gr gpf gp" f gn' o qf q" gp" s wg" 2 uqu" ug" ct vkwrcp" gp" r"
r ct vkwrc k f cf "f g" wpc" uqekgf cf " { "wp" o qo gpvq" j kw»tleq" f cf q" *Dki i ctv" { "I wkn? p." 3; ; ; <946+0

F g" guv" o qf q. "gp" r" r tguvpg" kpxguki cek»p" ug" tgvqo c" gn' cdqtf clg" f g" r u" Ekpkecu"
Uqekrgu" uqdtg' r tqdrgo cu' eqpukf gtc f qu" ògeqp»o lequ" {."r qt" n" vcpvq. "ektewpuetkr vqu' cn' eco r q"
f kæk r kpt "f g" r" Geqpqo ¶c0Gur ge ¶heco gpvg. "ug" cpcrk ct" e»o q" r u" go r tgucu. "nglqu" f g" ugt "wpc"
òeclc" pgi tcö. "uqp" qti cpk cekqpgu" uqekrgu" eqo r nglcu" chgevf cu" r qt" f kwkvqu" hcevt gu" Gp"
r ct vkwrc. "guv" gphqs wg" r gto kw" gpvpgf gt" f g" hqto c" o "a u" ecdcn" r" ceek»p" geqp»o kec" f g" r u"
Go r tgucu" O wnkpcckqpcrgu" gp" r c ¶ugu" r gk? tlequ" tgegr vqt gu. "eqo q" vco dk? p. "uwu" ko r cevu" gp" uw"
f gucttqm" geqp»o leq" Cu ¶. "gp" nqu" r t»zko qu" ecr ¶wru" ug" o quxtct" e»o q" r u" vgt o kpcrgu"
cwqo qvlegu" f g" Cti gp vkpc. "nglqu" f g" ugt "cevq gu" wphqto gu. "wxkgtqp" f kxgtuqu" f gugo r g° qu"
f wcpvg" r u" r tko gtcu" f 2 ecf cu" f gn' uki n. "f guce" pf qug" gn' ecu" f g" Vq { qv. " { "e»o q" guq" r wgf g"
gzr rlectug" c" r ct vkt "f gn' cp" ruku" gp" r tqhwf k f cf "f g" guv" qti cpk cek»p" o wnkpcckqpcn" { "uw" hkn"
cti gp vkpc" O

"

1.2 – El surgimiento de las Cadenas Globales de Valor y su marco teórico

Gp' r u' f 2 ecf cu' f g' 3; 92" { "3; : 2" ug' f kgtqp" gp' gn' b wpf q' wpc' ugtkg' f g' eco dkqu' s wg' wxkgtqp"
ko r cevu" gp" r" qti cpk cek»p" o cpw hcewtgtc" i nqdcn' Ugi Àp" Rgt gl " *4232+." guv" qn" f g"
vcpuhqto cekqpgu" gu" r ct vg' f g" r" s wkw" t g x q n w e k » p " v g e p q n » i k e c . " d c u c f c " g p " r " k p h q t o " a w e c . " r u "
vgrgeqo wplecekqpgu" { " r u " h q t o c u ' f g ' r t q f w e e k » p " h g z k d r g 0 8 " G m " k o r n e » " g n ' f g u c t t q m " f g " r u "
Vgepqm ¶cu" f g" kphqto cek»p" { "Eqo wplecek»p" *VUEu+." r u " e w c n g u " h e k k c t q p " g p q t o g o g p v g " r "
eqqt f k p c e k » p " c " f k u c p e k " f g " r u " f k h g t g p v g u " g v c u " f g " r " r t q f w e e k » p . " r g t o k k ? p f q r g u " c " r u "
go r tgucu" cewct "f g" hqto c" o wnkqecrk cf c0Qvtq" eco dkq" f g" ko r qt vcpck" gp" guv" 2 r qec "hwg" r"
hwgtvg' tgf week»p" f g" hqu' eququ" f g" vcpur qtvg. "gp" r ctvg. "r tqf wevq" f gn' cwi g' f g" r " containerización
*Rqt w" gv' cn" 4236+0 Rqt" qvtq" rcf q. "wpc" ugtkg" f g" hcevt gu" r qn ¶lequ" vco dk? p" chgevtqp" c" r"

⁴⁷" Gpvtg" gnu. "ug" r wgf gp" f guvct<" vgt ¶ " f g" r" o qf gtpk cek»p" *eco dkq" i tcf veni" gp" r" etgeck»p" f g" xcmqt+ "
gut wewtcrkuo q" ¶pf wutckrk cek»p+ "uqek»nqi qu' f gnlf gucttqm lpgqkpwkewekqpcnkuc" *Guvf q' cw»pqo q" { "ghlekpgv+ "
Vgqt ¶ " f g' r" F gr gpf gpek IVgqt ¶ " f gn' Ungo c/O wpf q" ¶ t g x q n w e k » p " r q n ¶ k e c " { " u q e k n 0 U k d k e p " h u ' c w q t g u ' p q ' h q ' t c v p . "
c" guv" vgt ¶cu" r qf t ¶pp" uwo ctug" nqu" vgt lequ" f g" r u" E I X " ¶pugtek»p" gp" r u" ecf gpcu+ { " gn'
pgqgut wewtcrkuo q lpgqj wo r gvtkcpqu" ¶ppqxcek»p lecr celf cf gu' vgepqn»i lecu+0

⁴⁸" Ectm v " Rgt gl " *4232+ " r g t k f k c " r " j k n q t k " e c r k c r k u c " g p " e l p e q " t g x q n w e k q p g u " v g e p q n » i k e c u " u w e g u k c u " f g u f g " 3992 "
{ " r c t c f k i o c u " v g e p q / g e q p » o l e q u " s w g " r u " e c t e v g t k c p < r " s w p v c " f g " g u c u " u g " f c " g p " 3; 93 " { " g u " f g h k p k c " e q o q " r " g t c "
f g " r " k p h q t o " a w e c . " r u " v g r g e q o w p l e c e k q p g u " { " r u " h q t o c u ' f g ' r t q f w e e k » p " h g z k d r g 0 G n l p l e k q " f g " g u v " A n k o c " g u v " f c f q "
r q t " r " c r c t k e k » p " f g n b l e t q r t q e g u c f q t " k p v r i g p " E c r k h q t p k . " G G W W O C " r c t v t " f g n l 4 2 3 2 " g z k u g " w p c " f k u e w i k » p " u k r " c e w c n l "
ò k p v g t p g v " k p f w u t k r i b " q " r " ò k p f w u t k " 6 0 ö " c e c d c " t g x q n w e k p e p f q " r u " h q t o c u " u q e k r g u " { " f g " r t q f w e e k » p . " g p " g u g " e c u q . "
e q t t g u r q p f g t ¶ " e q p " w p c " u g z v c " t g x q n w e k » p " g p " g n ' g u w f k q " f g " R g t g l " * 4 2 3 2 + 0

qti cpk celap f g'ir' r tqf weekap' b' wpf kcn'gp' gucu' f² ecf cu0Gpvt g' gmq. 'ug' gpe wgpvt cp' r' ec' f' c' f' gn' dms wg' uqxl² vek. 'gn' i ktq' f' g' Ej kpc' j' cek' w' p' ecr kcn'uo q' f' g' Guvcf q' { "r' rkdgtckl celap' f' g' r' geqpqo f' c' kpf k. 'i' gpgtcpf q' w' p' cwo gpv' f' g' r' ecr cek' cf' r' tqf wekxc' f' gn' r' p' gvc' { "gn' kpetgo gpv' f' gn' eqo gtek' l' p' w' t' p' c' ek' q' p' c' n' r' k' p' x' g' t' u' k' p' g' z' v' t' p' l' g' t' c' { "r' u' w' d' e' q' p' v' t' c' v' e' k' p' l' p' w' t' p' c' e' k' q' p' c' n' *Rqt v' c' gv' cr' 0' 4236+0"

Gucu' o qf hkecekppgu' ko r rlectqp' ko r qtvcpgu' eco dkqu' gp' r' qti cpk celap' f' g' r' u' GO u. { "c' s' wg' v' p' f' l' g' t' q' p' c' v' t' c' p' u' h' g' t' k' c' r' i' w' p' c' u' c' e' v' x' k' f' c' f' g' u' o' i' g' p' g' t' c' r' o' g' p' v' g' . r' u' o' g' p' q' u' t' g' p' w' d' r' g' u' { "u' q' h' u' k' e' c' f' c' u' o' f' g' n' r' t' q' e' g' u' q' r' t' q' f' w' e' k' x' q' j' c' e' k' c' q' v' t' c' u' g' o' r' t' g' u' c' u' *outsourcing+ { "q' v' t' q' u' r' c' f' l' u' g' u' *offshore+ " o c { q' t' o' g' p' v' g' f' g' r' r' g' t' k' h' g' t' k' . " t' g' v' g' p' k' p' f' q' r' c' t' c' u' f' i' n' u' u' g' i' o' g' p' v' q' u' s' w' g' o' a' u' x' c' r' i' t' c' i' t' g' i' c' p' *c' e' v' x' k' f' c' f' g' u' core+ { "v' t' e' k' t' k' c' p' f' q' i' n' u' r' t' q' e' g' u' q' u' r' t' q' f' w' e' k' x' q' u' i' g' p² t' l' e' q' u' q' f' g' d' c' l' q' x' c' r' i' t' . ' e' g' p' v' t' c' f' q' u' g' p' g' n' i' x' q' n' w' o' g' p' { "g' p' r' e' q' o' r' g' v' k' x' k' f' c' f' / r' t' g' e' k' q' *Rqt v' c' gv' cr' 0' 4239+0' Nc' g' u' v' t' c' v' i' k' c' g' u' s' f' c' f' r' q' t' s' w' g' d' t' c' t' g' n' r' t' q' e' g' u' q' r' t' q' f' w' e' k' x' q' g' p' x' c' t' k' u' u' g' i' o' g' p' v' q' u' f' k' u' e' t' g' v' q' u' { "e' q' p' h' q' t' o' c' u' g' u' r' g' e' h' k' e' c' u' f' g' q' t' i' c' p' k' c' e' l' a' p' 0' G' u' v' i' g' p' g' t' w' p' c' l' p' v' g' t' f' g' r' g' p' f' g' p' e' k' b' c' { q' t' g' p' r' e' u' t' g' f' g' u' e' q' o' g' t' e' k' r' g' u' l' p' w' t' p' c' e' k' q' p' c' r' g' u' f' c' f' q' s' w' g' w' p' c' r' c' t' v' g' k' o' r' q' t' v' c' p' v' g' f' g' n' i' x' c' r' i' t' f' g' r' u' g' z' r' q' t' w' e' k' q' p' p' u' e' q' o' g' p' l' » c' e' q' p' v' g' p' g' t' x' c' r' i' t' k' o' r' q' t' v' c' f' q' g' p' o' a' u' f' g' w' p' q' t' k' i' g' p' { "g' t' c' r' q' u' k' d' r' g' s' w' g' e' k' t' e' w' g' p' r' q' t' o' a' u' f' g' w' p' f' g' u' v' k' p' q' j' c' u' x' h' g' i' c' t' c' r' i' n' u' e' q' p' u' w' o' k' f' q' t' g' u' h' k' p' c' r' g' u' f' g' h' q' t' o' c' v' c' n' s' w' g' n' r' t' q' e' g' u' q' f' g' c' i' t' g' i' c' e' k' p' f' g' x' c' r' i' t' e' q' o' g' p' l' » c' q' e' w' t' t' k' g' p' o' A' n' k' r' g' u' g' u' r' c' e' k' q' u' p' c' e' k' q' p' c' r' g' u' *I' g' t' g' h' k' gv' cr' 0' 4223=I' g' t' g' h' k' { "M' q' t' |' g' p' k' y' k' e' | . ' 3 ; ; 6 + 0"

Gp' dcug' c' guv' r' t' q' e' g' u' q' . " m' u' c' w' a' t' g' u' I' g' t' g' h' k' { "M' q' t' |' g' p' k' y' k' e' | " * 3 ; ; 6 + . " t' g' v' o' c' p' f' q' i' n' u' c' r' q' t' v' g' u' f' g' r' e' v' g' t' f' c' f' g' n' i' u' k' u' g' o' c' / o' w' p' f' q' * J' q' r' n' k' u' { "Y' c' m' g' t' u' v' g' k' p' . ' 3 ; ; 8 + . " g' r' d' q' t' c' t' q' p' g' n' i' e' q' p' e' g' r' v' q' f' g' cadena global de commodity" *EI E+ s' w' g' n' w' i' q' o' q' f' h' k' e' c' t' q' p' g' p' cadena global de valor" *EI X+ *I' g' t' g' h' k' gv' cr' 0' 4227=J' w' o' r' j' t' g' { "U' e' j' o' k' l' . ' 4224+ . 49' r' e' w' e' n' i' r' w' g' f' g' p' v' g' p' f' g' t' u' g' e' q' o' q' " la secuencia de actividades que las firmas y los trabajadores realizan desde el diseño de un producto hasta su uso final" *I' g' t' g' h' k' { "H' g' t' p' a' p' f' g' l' / U' c' t' m' 4233 < 6 + 0' C' u' w' x' g' l' . " r' h' q' t' o' c' e' l' a' p' f' g' g' u' c' u' e' c' f' g' p' c' u' r' g' e' q' p' h' i' w' t' » w' p' r' c' r' g' n' i' f' g' o' c' { q' t' v' t' c' u' e' g' p' f' g' p' e' k' c' r' u' i' t' c' p' f' g' u' GO u' g' p' r' q' t' i' c' p' k' c' e' l' a' p' g' e' q' p' » o' k' e' c' b' w' p' f' k' c' n' i' c' s' w' g' r' e' u' b' k' u' o' c' u' g' l' g' t' e' g' p' r' i' q' d' g' t' p' c' p' l' c' f' g' r' e' u' EI X. r' w' g' f' g' p' u' w' d' q' t' f' k' p' c' t' c' n' t' g' u' v' q' f' g' r' u' g' o' r' t' g' u' c' u' f' g' r' u' t' c' o' c' . " t' g' v' k' e' p' g' p' m' u' u' g' i' o' g' p' v' q' u' s' w' g' o' c' { q' t' x' c' r' i' t' c' i' t' g' i' c' p' . " v' k' p' g' p' o' c' { q' t' h' e' k' i' k' f' c' f' r' c' t' c' t' g' w' d' l' e' c' t' u' w' i' k' p' x' g' t' u' k' q' p' p' u' { " r' w' g' f' g' p' q' r' g' t' c' t' o' w' n' k' e' c' t' k' c' f' c' o' g' p' v' g' g' p' v' k' g' o' r' q' t' g' c' n' i' { "g' p' h' q' t' o' c' u' g' r' e' v' k' c' 0"

49" Guv' u' eco dkqu' gp' r' eqpegr wcrk celap' ko r rlectqp' s' wgdgtgu' eqp' gn' o' cteq' vgtlek' f' gn' ukugo c/o wpf q. r' tlpekr' cm' gpv' gp' v' t' p' q' c' r' e' w' g' u' k' p' f' g' n' i' d' e' s' a' r' r' o' l' l' o' . Nqu' c' w' a' t' g' u' f' g' r' e' VUO' u' q' u' v' k' p' p' s' w' g' n' i' g' p' h' q' s' w' g' f' g' EI X' r' q' u' g' g' w' p' c' o' k' n' u' k' p' f' g' u' c' t' t' q' n' k' u' c' o' { c' s' w' g' r' e' p' v' g' c' p' s' w' g' r' e' l' p' u' g' t' e' k' p' f' g' g' o' r' t' g' u' c' u' { r' c' f' l' u' g' u' g' p' r' e' u' EI X' k' o' r' r' e' c' w' p' c' o' g' l' q' t' c' r' c' t' e' 2' u' q' u' . b' o' l' e' p' v' t' c' u' s' w' g' r' e' VUO' r' q' u' g' g' w' p' c' x' k' u' k' p' b' o' a' u' g' u' v' v' e' c' g' p' r' e' w' e' n' i' r' e' b' o' c' { q' t' r' c' t' v' g' f' g' n' i' x' c' r' i' t' f' g' g' u' c' u' e' c' f' g' p' c' u' g' u' v' t' c' p' u' h' g' t' k' q' c' n' u' r' c' f' l' u' g' u' e' g' p' v' t' c' r' g' u' . u' k' i' w' k' p' f' q' r' e' x' k' u' k' p' f' g' r' e' V' g' t' f' c' f' g' r' e' F' g' r' g' p' f' g' p' e' k' c' { r' e' c' a' d' e' n' a' i' m' p' e' r' i' a' l' f' g' N' g' l' p' * 3 ; 39 + * C' t' t' k' i' j' k' 3 ; ; 2 = D' c' k' . 4227 = Y' c' m' g' t' u' v' g' k' p' . ' 3 ; ; : : + 0' R' c' t' c' e' q' p' u' w' a' c' t' u' q' d' t' g' r' u' e' c' o' d' k' u' g' p' i' n' u' f' h' g' t' g' p' v' g' u' e' q' p' e' g' r' v' q' u' f' g' e' c' f' g' p' c' u' f' g' x' c' r' i' t' x' g' t' U' w' i' t' g' q' p' * 4232 + q' D' c' k' * 4227 + 0'

F g'gug'o qf q. 'rc'rkgtcwtc'f g'EI X'qhtgeg'wpc'f guetkr ekp'gukrk cf c'f g'guc'u'tgf gu'f g' r tqf weekp'i r mdcn'c'r ctvk'f g'f qu'eqpegr vqu'erxg<gobermanza"{"upgrading"Uwti gqp."4232+0' Nc'pqekp'f g'gobermanza ko r rlec'wpc'xlukp'top-down."cn'cpcrk ct'e>o q'rcu'go r tgucu'fff gtgu' f g'rc'ecf gpc'eqpvtqncp"{'\qo cp'rcu'f gekukqpgu'rki cf cu'c'rc'qti cpk cekp'f gn'r tqeguq'r tqf wekxq" *gu'f gek. 'i qdktgpcp+0Nqu'r tko gtqu'vcdclqu'f g'ukugo cvk cekp"{'ercukhecekp'f g'rcu'hqto cu'f g' gobermanza"hwgtqp'tgcrk cf qu'r qt "I gtghk'*3; ; 6+."s wkgp'r qt "gpvqegu'kf gpvkk>"f qu'vr qu' r tlpekr crgu'f g'ecf gpcu'rcu'f kki kf cu'r qt "gn'eqo r tcf qt "*buyer-driven+" {"rcu'f kki kf cu'r qt "gn' r tqf wevt "*producer-driven+0'Nwgi q. "I gtghk"J wo r j tg{" {"Uwti gqp" *4227+" eqo r rglk ctqp" f lej q"eqpegr vq'etgcpf q'ekpeq'vr qu'kf gcrqu'f g'i qdgtgpcp| c'f g'rcu'EI X's wg'ug'eqo r ngo gpvcp" cn' r tko gt" f gucttqm" v>tleq.⁴ " vqo cpf q" eqo q" wpk cf " f g" cp^a rkuku" rqu" x'pewqu" gptg" rqu' gurcdqpgu."c+f g'o gtecf q=d+"o qf wrct=e+"tgrcekpcn=f +"ecwxc" {"g+"lgt^a ts wlec0'Guc'pwgxc" vr qmi 'c'witi k>"f gn'etweg'gptg'v'gu'xctkcdrgu'c+" rc" eqo r rglk cf " f gn' kpvgtco dkq" f g' kphqto cekp" gptg" r tqxggf qt" {"eqo r tcf qt."d+"rc"eqf kkecdkcf cf "f g'vni'kphqto cekp" {"e+"rc" gzkwgpek" *q" pq+" f g' ecr cekf cf gu" gp" rqu' r tqxggf qt gu'0' Gp" tguwo gp. "rcu' i qdgtgpcp| cu' f g' ño gtecf qö" {"rc'õlgt^a ts wlecö"uq"tcf lecn gpv"qr wguvcu'gp'gn'r tko gt"ecuq."rqu'x'pewqu" gptg" r tqxggf qt" {"eqo r tcf qt"uq"p'f g'o w{"dclc'f gpukf cf " {"gp'gn'Anko q"qr gtcp"cn'kpvgtkqt'f g'wpc" o kuo c"eqo r c° 'c0'

Rctc'gn'r tqr >ukq'f g'guc'vguku'rc'i qdgtgpcp| c'f g'rc'ecf gpc'gu'egpvtcn'r ctc'gpvqpf gt'rcu' ectcevt'fwlecu'gur ge'fhecu'f g'rc'go r tguc'fff gt '*Vq{ qvc."rc'vgo kpcn'cwqo qvkk +{"rcu'go r tgucu' uwdqtf kpcf cu'*r tqxggf qt gu'cwqr ct'wrcu+0'Gp'gug'ugpvkf q."rc'rkgtcwtc'f g'EI X'j c'ercukhecf q" c'rc'kpf wutk'cwqo qvkk "eqo q'wpc'ecf gpc'f kki kf c'r qt'gn'r tqf wevt "*producer-driven+, f gdlf q" c's wg'hqu'ce'v'xqu'gur ge'fhequ's wg'gu^a p'r qt'f gvt^a u'f g'gug'vr q'f g'i qdgtgpcp| c'uq'p'r tlpekr cno gpv" rcu'ecr cekf cf gu'r tqf wekxcu."rqu'cnqu'tgs wgtko kgpvqu'f g'ecr kcn" {"rc'kpxguki cekp" {"f gucttqm" *K F +0'Ncu'go r tgucu's wg'i qdktgpcp'rcu'producer-driven"uwngp'uwdeqvtcvt'cni wpcu'rcugu'f g' rc' r tqf weekp.'r gtq'tg'v'gpp'r ctc'uf'rc'K F " {"rc'bo cpwrcwtcekp"*eqo r rglc+f gridk'p'kpcn'*Rqt'vc" gv'cn0'4236+0'

Gp"ewcpvq"rc'rc'ugi wpc'ercukhecekp'f g'i qdgtgpcp| c."rqu'vr qu'f g'²uc'gp'rc'kpf wutk' cwqo qvkk "r wgf gp"xctkct'f gr gpf kpf q'f g'rc'tg'rc'ekp'vgo kpcn'r tqxggf qt0'Gp'i gpgtcn'gp'rcu'

⁴: "Rqt'wp'rcf q.'ug'f kq's wg'guc'vr qmi 'c'gtc'hwgtvgo gpv'gu^a vlec" {"f leq>o lec." {"s wg'gucdc'hwpc'co gpvc'c'gp'wpc' xkukp'ulo r rkuc'f g'rc'vgepqmi 'c' {"f g'rcu'dcttgc'f g'gpvc'c's wg'gp'o wej qu'ecuqu'pq'ug'clwuxcdcp'c'rc'tgcrk cf 0' Gm'gp"r ct'v'qewt'f'rc'qts wg'rcu'r tqr kcu'ecf gpcu'gucdcp"uqo gvk cu'c"eqpuvcp'v'u'r tqeguqu'f g'v'c'puh'qto cekp." eco dkq'vgepq>i leq" {"cr tgp'k clg0'C"r ct'vk'f g'gmq."ug'r tghk">"i gpgct'wpc'vr qmi 'c' *eqo r ngo gpvtk'o^a u's wg' uwr ngo gpvtk'+s wg'hwgug'o^a u'p'gwrcn'gp'v' to kpcu'ugev'q'lcrgu"*gu'f gek's wg.'r qt'glgo r rqi."cuwo lgt'c's wg'pq'v'q'c" ecf gpc'f g'rc'grgevt'p'ek'v'gpg'p'geuctkco gpv'gn'bo kuo q'r cvt>p'f g'i qdgtgpcp| c+.s wg'r tgucug'bo c {"qt'cv'pek'p'c'rq' x'pewqu'gptg'hqu'gurcdqpgu" {"s wg'hwgtc'ecr c| "f g'f ct'ewpvc'f g'rcu'eco dkqu'gp'gn'vgo r q'cn'kpvgtkqt'f g'wpc'bo kuo c' ecf gpc0'

ecf gpcu" f g" xcmq" cwqo qvkl " guvqu" j cp" ukf q" ecvnci cf qu" eqo q" tgrckqpcn" f g" o gtecf q" q" ecwvku0' F g" guvq" o qf q. "rcu" gur gekhecekqpgu" ug" r wgf gp" f gucttqmc" eqplwvco gpvg. "gp" wp" r tqeguq" f g" eq/f lug° q. "q" rqu" r tqxggf qtgu" r wgf gp" tgeklk " kputweekqpgu" eqo r rvcu" uqdtg" s w² " r tqf wekt0' Gp" gn' r tko gt" gphqs wg. "o" a u" tgrckqpcn" rqu" kpi gpkgtqu" f g" f lug° q" f g" ruc" r tkpek crgu" go r tgucu" { " r tqxggf qtgu" vcdclcp" gp" gutgej c" eqmcdqtcckp" r etc" f gucttqmc" r klj cu" s wg" hvpekqpc" p" gp" gn' eqpvz vq' f grif lug° q' i' gpgtcrif grlxgj " f wvq0' Gp" lgi wvf c' kpuvpek. 'hqu' kpi gpkgtqu" f g" ruc" go r tguc" hff gt" f gucttqmc" vqf cu" ruc" r klj cu" f g" xgj " f wvqu" kpvtpco gpvg" { " r wgi q" rdekcp" ruc" r klj c. " etgcpf q" wp" x" f wvqu" f g" o gtecf q" eif ukeq" eqp" rqu" r tqxggf qtgu" q. " ewcpf q" ug" tgs wkgtp" kpxgtukqpgu" gur ge" f hcku" f g" ruc" tgrckp" r qt" r ctvg" f g" rqu" r tqxggf qtgu. " s wg" c" o gpwf q" rj" uqp. " gpncegu" ecwvku0' Nqu" x" f wvqu" f g" o gtecf q" r gto kvgp" gn' eco dlq' f' eki' f g" r tqxggf qtgu. " o kpvrcu" s wg" hqu" gpncegu" tgrckqpcr" gu" { ' ecwvku' f' k hewncp' gn' eco dlq' f' g' r tqxggf qt " *Uwti gqp' gv' cr0' 422; < 42-0'

Rqt" qvtq" rcf q. " ruc" pkek" p" f g" *upgrading* ug" cr q { c" gp" wpc" eqpegr ekp" *bottom-up*. " cn' hqecrk ctug" gp" e»o q' ruc" hto cu' uwdqtf kpcf cu' r wgf gp" *q' pq+ k" guernpf q" gp" ruc" ecf gpc" *I gtghk" 4223=I gtghk' gv' cr0' 4223. "4227-0' Gn' *upgrading*" c" plxgn' f g" ruc" hto c" ug" tghktg" cn' r tqeguq" f g" cf s wvkekp" q" hqtvcrgeko kpvq" f g" ecr cekf cf gu' s wg" r gto kvgp" c" ruc" go r tgucu" j cegt" equcu" f g" o cpgtc" f hktgpvg" { lq" o glqt" { " j cegt" f kpvku" equcu" gp" eqo r ctcekp" eqp" gn' eqpvz vq" r t gxlq" *j qtwm" 423; +0' Gn' r tqr » ukq" f gn' eqpegr vq" f g" *upgrading*" gu" gzc" o kpc" ruc" r tqeguq" { " ruc" hto cu" gp" s wg" ruc" go r tgucu" s wg" pq" i' qdktpcp" ruc" ecf gpc" *{ " r qt" rj" vpvq" gu³ p" uwdqtf kpcf cu'+ uwdgp" guernqpgu" gp" ruc" guernc" kpvtpcekqpcn' f g" cevklf cf gu' f g" xcmq" ci tgi cf q. " o qxk² pf qug" f guf g" cevklf cf gu' f g" dclq' xcmq" c' cevklf cf gu' f g" cnq' xcmq" r etc" cwo gpvt' ruc" dggphkekqu" f g' r ctvek" ct" gp" EI X" *Dck" { " I gtghk" 4225-0' Ncu' ectcevt' f hcku" f g" ruc" x" f wvqu" gpvtg" ruc" uwdkf kctkcu" f g' ruc" go r tgucu" o wvkekp" c" ruc" { " ruc" r tqxggf qtgu" f g" ruc" r c" f ugu" f qpf g" ug" ruc" eqp" cp" uqp" wp" hcevt" lo r qt vpvq" r etc" gn' r qvpekcn' guernc" kpvq" kpf wvklcn' f g" ruc" hto cu" f qo ² wvkecu" { " ruc" vkr qu" f g" ghgevu" f gttco g" s wg" i' gpgtc" ruc" r t gupkek" f g" ruc" o wvkekp" c" ruc" gp" r c" f ugu" gp" f gucttqmq" *Rcxn' f pgm" 423: -0' Eqo q" ug° crcp" O krdgti " { " Y kpmgt" " *4235+ " gn' gphqs wg" f g" ruc" EI X" r tª evkeco gpvg" gs wkr etc" *upgrading*" c" *desarrollo económico*.

J wo r j tg { " { " Uej o kl " *4224+ j cp" f kpvku" wlf q" ewvtq" vkr qu" f g" *upgrade*. " c" ucdgt < " *de procesos, de producto, funcional g intersectorial* 0' Gn' r tko gtq. " *de procesos*. " gu" gn' oª u' f' eki' f g" eqpugi wkt" g" ko r rdec" r tqf wekt" oª u" g' hkekpvg" gpvg" *o c { qt" r tqf wevklf cf + " { c" ugc" wvklj cpf q" vgepqmji " f " uwr gktqt" *r qt" glgo r m. " pvwxcu" o cs wvpc" tku" q" o gf kcpvg" ruc" t ggti cplj cekp" f g" ruc" ukvgo cu' r tqf wevku. " f gpvtq" f g" ruc" go r tguc" q" o glqtcpf q" ruc" tgrckqpgu" eqp" qvtqu" gurcdqpgu" f g" ruc" ecf gpc0' Gn' lgi wvf q. " *de producto*. " ko r rdec" o c { qtgu' ecr cekf cf gu' s wg" gn' f g' r tqeguq" { ' eqpukvng" egpvrcm" gpvg" gp" j' cegt" hff gcu" f g' r tqf wevq" oª u' uqhkvkecf cu. " f g" o c { qt' ecrkf cf " { ' eqp" o c { qt' xcmq" "

wpkctkq* r qt' glgo r mq. 'r cuct' f g' hcdtlect' xkpqu' f g' o guc' c' xkpqu' hkpqu' 0' Gn' vtegtq. "funcional." gu' f g' mu' o' a' u' f' k' f' e' g' u' f' g' mi' tct' { "eqpmxgc" gn' f' gur' r' | co' kgpvq' j' cek' c' e' v' k' f' c' f' gu' s' w' g' t' g' s' w' k' t' c' p' o' c' { qt' gu' e' c' r' c' e' k' f' c' f' gu' } . 'r' qt' g' p' f' g' . 'v' p' i' c' p' o' c' { qt' gu' d' c' t' t' g' t' c' u' c' ' r' e' ' g' p' v' t' c' f' c' *' r' qt' g' l' g' o' r' m' q' . 'o' q' x' g' t' u' g' f' g' n' i' g' p' u' c' o' d' r' g' j' c' e' k' c' " g' n' i' f' k' u' g' o' q' + 0' G' n' i' A' n' k' o' q' . "intersectorial." s' w' g' " k' o' r' n' e' c' " r' e' " w' k' k' c' e' k' p' " f' g' " r' e' u' e' c' r' c' e' k' f' c' f' gu' c' f' s' w' k' k' f' c' u' g' p' " w' p' c' " e' c' f' g' p' c' " r' c' t' c' " g' n' i' v' t' c' u' m' f' q' j' c' e' k' c' " p' w' g' x' q' u' " u' g' e' v' t' g' u' " *' r' qt' g' l' g' o' r' m' q' . " w' k' k' c' t' " r' e' u' e' c' r' c' e' k' f' c' f' gu' q' d' v' p' k' f' c' u' r' c' t' c' " r' e' " h' c' d' t' l' e' c' e' k' p' " f' g' " v' g' n' x' k' u' q' t' g' u' r' c' t' c' " j' c' e' g' t' " o' q' p' k' q' t' g' u' { " f' g' u' r' r' | c' t' u' g' c' n' i' u' g' e' v' t' " f' g' " r' e' u' e' q' o' r' w' c' f' q' t' c' u' 0' G' u' v' u' e' q' p' e' g' r' v' u' u' g' t' a' p' " t' g' v' o' c' f' q' u' " g' p' " g' n' i' E' c' r' ¶ w' w' q' " 7' " c' n' i' c' p' c' r' k' c' t' " r' e' " v' t' c' { g' e' v' t' k' c' " f' g' " r' e' u' r' t' k' p' e' k' c' r' g' u' " g' o' r' t' g' u' c' u' r' t' q' x' g' g' f' q' t' c' u' f' g' " V' q' { q' v' c' " C' t' i' g' p' v' k' p' c' " g' p' " r' e' u' A' n' k' o' c' u' f' 2' e' c' f' c' u' f' g' u' e' k' t' c' p' f' q' " u' k' j' c' p' " m' i' t' c' f' q' r' t' q' e' g' u' q' u' f' g' " u' p' g' r' a' d' i' n' g' " { " f' g' s' w' 2' " v' k' r' q' 0' "

Cf go a u. " f g' p' v' t' q' " f' g' n' i' e' w' g' t' r' q' " f' g' " v' c' d' c' l' q' u' " f' g' " E' I' X' " u' g' " e' c' v' i' q' t' k' c' p' " c' " r' e' u' " p' c' e' k' q' p' g' u' r' t' q' f' w' e' v' t' c' u' " f' g' " x' g' j' ¶ e' w' w' q' u' " f' g' r' g' p' f' k' g' p' f' q' " f' g' " u' w' u' " e' c' r' c' e' k' f' c' f' g' u' . " h' w' p' e' k' q' p' g' u' " { " r' t' q' r' k' g' f' c' f' " f' g' " r' e' u' " g' o' r' t' g' u' c' u' " *' x' g' t' " H' k' i' w' t' c' " K' 3' + 0' " W' p' q' " f' g' " m' u' r' t' k' o' g' t' q' u' c' t' ¶ e' w' w' q' u' s' w' g' " t' g' r' c' r' k' » " g' u' v' u' e' m' u' k' h' e' c' e' k' q' p' g' u' " u' g' " d' c' u' » " g' p' " w' p' " u' k' u' g' o' c' " f' g' " e' m' u' k' h' e' c' e' k' p' " c' e' n' t' r' o' - p' e' r' i' f' e' r' i' a " *' U' w' t' i' g' q' p' " (" H' q' t' k' f' c' . " 4222 + 0' " V' t' c' d' c' l' q' u' " r' q' u' v' t' k' q' t' g' u' k' f' g' p' w' h' e' c' t' q' p' " x' c' t' k' u' p' c' e' k' q' p' g' u' r' t' q' f' w' e' v' t' c' u' " f' g' " x' g' j' ¶ e' w' w' q' u' s' w' g' " m' g' i' c' t' q' p' " c' " u' g' t' " e' q' p' q' e' k' f' c' u' " e' q' o' q' " r' e' " p' e' r' i' f' e' r' i' a i' n' t' e' g' r' a' d' a . " f' k' u' k' p' i' w' k' d' r' g' " r' q' t' " u' w' u' " e' q' u' v' u' " f' g' " r' t' q' f' w' e' e' k' p' " t' g' r' e' v' x' c' o' g' p' v' g' " d' c' l' q' u' " *' E' j' c' p' c' t' q' p' . " 4226 = " L' c' e' q' d' u' . " 4238 + 0' G' u' v' u' r' c' ¶ u' g' u' . " u' k' " d' l' g' p' " g' p' " m' u' " A' n' k' o' q' u' " c' o' q' u' r' q' u' g' g' p' " i' f' d' t' l' e' c' u' " { " v' g' e' p' q' m' i' ¶ e' u' " f' g' " x' c' p' i' w' c' t' f' k' c' . " f' g' r' g' p' f' g' p' " e' c' u' k' v' q' w' e' m' g' p' v' g' " f' g' " r' e' " k' o' r' q' t' v' c' e' k' p' " f' g' " e' c' r' k' c' n' " v' g' e' p' q' m' i' ¶ e' u' " { " j' c' d' k' k' f' c' f' g' u' q' r' g' t' c' v' x' c' u' f' g' u' f' g' " g' n' i' g' z' v' t' c' p' l' g' t' q' 0' "

Nwgi q. " R' e' x' i' f' p' g' n' i' " * 423: + " k' p' v' t' q' f' w' l' q' " r' e' " e' c' v' i' q' t' ¶ e' " f' g' " s' e' m' i' - p' e' r' i' f' e' r' i' a " c' w' q' o' q' t' k' k' . " s' w' g' " u' g' " c' r' n' e' c' " c' " m' u' r' c' ¶ u' g' u' r' t' q' f' w' e' v' t' g' u' " f' g' " x' g' j' ¶ e' w' w' q' u' " o' a' u' " t' l' e' q' u' s' w' g' . " c' " f' k' h' g' t' g' p' e' k' " f' g' " r' e' u' " p' c' e' k' q' p' g' u' " \$ e' g' p' v' t' c' r' g' u' \$. " e' c' t' g' e' g' p' " f' g' " w' p' " h' c' d' t' l' e' c' p' v' g' " f' g' " c' w' q' o' » x' k' u' g' u' e' q' p' " u' g' f' g' " g' p' " g' n' i' r' c' ¶ u' 0' " C' " u' w' x' g' l' . " O' q' t' f' w' g' " { " U' y' g' g' p' g' { " * 4242 + " r' t' q' l' h' w' p' f' k' c' t' q' p' " g' n' i' c' p' a' r' k' u' k' u' f' g' " r' e' " s' e' m' i' - p' e' r' i' f' e' r' i' a " c' " r' c' t' v' k' t' " f' g' n' i' e' c' u' q' " f' g' " E' c' p' c' f' a' 0' F' g' " v' q' f' q' u' " o' q' f' q' u' . " g' u' v' u' e' c' v' i' q' t' ¶ e' u' " p' q' " u' q' p' " g' u' a' v' e' c' u' " { " g' n' i' m' i' c' t' " f' g' " r' e' u' " p' c' e' k' q' p' g' u' " g' p' " r' e' " e' c' f' g' p' c' " r' w' g' f' g' " e' c' o' d' k' t' " c' " m' i' r' c' t' i' q' " f' g' n' i' v' g' o' r' q' 0' G' l' g' o' r' m' u' f' g' " g' u' v' u' o' " q' x' k' o' k' g' p' v' q' u' u' q' p' " g' n' i' e' c' u' q' " f' g' " G' u' r' c' o' c' " { " E' c' p' c' f' a' " r' c' u' c' p' f' q' " c' " u' g' t' " p' e' r' i' f' e' r' i' a i' n' t' e' g' r' a' d' a " c' " s' e' m' i' - p' e' r' i' f' e' r' i' a { I' t' c' p' " D' t' g' v' c' o' c' " { " U' w' g' e' k' " f' g' u' f' g' " g' n' i' c' e' n' t' r' o' c' " r' e' " s' e' m' i' - p' e' r' i' f' e' r' i' a .

Cf go a u. " u' g' " t' g' i' k' u' t' c' p' " f' q' u' " e' c' u' q' u' " j' ¶ i' t' k' f' q' u' . " E' j' k' p' c' " g' " k' p' f' k' c' 0' G' u' v' u' r' c' ¶ u' g' u' " f' g' o' w' g' u' t' c' p' " c' v' t' k' d' w' q' u' e' m' x' g' " v' c' p' v' q' " f' g' n' i' c' e' n' t' r' o' " e' q' o' q' " f' g' " r' e' " p' e' r' i' f' e' r' i' a i' n' t' e' g' r' a' d' a . " e' q' o' q' " t' g' u' v' u' c' f' q' " f' g' n' i' j' g' e' j' q' " f' g' " s' w' g' " u' w' x' g' p' v' c' l' c' " e' q' o' r' g' v' k' k' c' " u' g' " f' g' t' k' c' " f' g' " m' u' " d' c' l' q' u' " e' q' u' v' u' " f' g' " r' t' q' f' w' e' e' k' p' " *' g' u' " f' g' e' k' t' . " m' u' " d' c' l' q' u' " u' c' m' t' k' u' + " c' u' ¶ e' q' o' q' " v' c' o' d' i' k' p' " r' c' u' c' t' q' p' " c' " u' g' t' " r' e' " e' c' u' c' " o' c' v' t' k' " f' g' " f' k' u' k' p' v' u' " h' c' d' t' l' e' c' p' v' g' u' " f' g' " x' g' j' ¶ e' w' w' q' u' 0' G' n' i' j' g' e' j' q' " f' g' " s' w' g' " E' j' k' p' c' " g' " k' p' f' k' c' " f' g' o' w' g' u' t' g' p' " e' c' t' c' e' v' g' t' ¶ u' k' e' c' u' " v' c' p' v' q' " r' g' t' k' f' t' l' e' c' u' " e' q' o' q' " e' g' p' v' t' c' r' g' u' " g' u' "

4: " R' e' t' e' " g' m' q' " u' g' " d' c' u' c' " g' p' " m' u' " f' g' u' c' t' t' q' m' u' " v' g' » t' l' e' q' u' " f' g' " d' e' s' a' r' r' o' l' l' o' d' e' s' i' g' u' a' l " *' J' c' t' x' g' { . " 4237 + " { " f' g' " r' e' d' e' s' g' l' o' b' a' l' e' s' d' e' p' r' o' d' u' c' c' i' o' n' " *' E' q' g' v' v' c' r' i' 0' " 4226 = " J' g' p' f' g' t' u' q' p' " g' v' v' c' r' i' 0' " 4224 + 0' "

f go qutcvkxq" f g" rnu" ecr cekf cf gu" s wg" j cp" cewo wrcf q" gp" eqo r ctcekp" eqp" qtcu" pcekppgu" r tqf weqtcu" f g" xgj f e w n u " O q t f w g (" U y g g p g { . " 4 2 4 2 + 0

Figura I-1 – Diagrama de la cadena global de valor automotriz por países



Hvpgv<gndqtcekp" r tqr k" gp" dcug" c" O q t f w g (" U y g g p g { " 4 2 4 2 + 0 { " R c x n f p g n " 4 2 3 : + 0

Rqt" uw" r ctvg. " gp" rnu" r gt h g t k u " k p v i t c f c u " r t g f q o k p c p " r u " l f d t l e c u { " v e p q r i f c u " f g" h t q p v t c . " r g t q " n " r t q f w e e k p . " n " q t i c p k c e k p { " r u " h w p e k p p g u " g u t c v i l e c u " u g " e q p v t q r p " g z v t p c o g p v g " c " t c x 2 u " f g " n " r t q r k g f c f " g z v t c p l g t c " * U k o q p c | | k ' g v ' c r i 0 " 4 2 4 2 + 0 C f g o a u . " g u c u " t g i k p p g u " r w f g p " f k x k f k t u g " g p " f q u " o q f q u " f h g t g p v g u " f g " k p v i t c e k p " g p " w p " u k u v g o c " f g " r t q f w e e k p " c w q o q v k " t g i k p p c n " e q p " f k u k p c u " k o r n e c e k p p g u " r c t c " r u " r g t u r g e v k x c u " f g " f g u c t t q m q < 3 + " n " k p v i t c e k p " e q o q " r c " u " r g t k f t l e q " g p " w p " i t c p " u k u v g o c " f g " r t q f w e e k p " t g i k p p c n " { " 4 + " n " k p v i t c e k p " g p " r k g " f g " k i w c n f c f " g p " w p " u k u v g o c " f g " r t q f w e e k p " t g i k p p c n " o a u " g s w n d t c f q 0 ' G l g o r m u " f g " g u x q "

Ànko q "kpenw{ gp" c "Dtcuki" { "Cti gpvpc" gp" Co 2 tlec" f gn'Uwt. " { "Vckrcpf kc." O crukc. "Kp qpukc." Hkr kpcu{ "Xkypco "gp" gn'uwf guvg" cuk² vkeq' Nqu' glgo r mu' r ctc' r' tko gtc' ecvgi qt' c' uq' P' O² zleq' gp' gn'ecuq' f' g' Co 2 tlec' f' gn' P' qtv. 'cu' f' eqo q' hqu' r c' f' ugu' f' g' Gwtqr c' Egpv' cni' { 'Qt' kpv' cni' gp' gn' lukugo c' gwtqr gq' f' g' r tqf week' p' cwqo qv' k. "s wg" hwt' qp' r tgegf kf qu' r qt' Gur c' o c' { "Rqt wi cni' *Y wwg. " 4243 < 5 + 0² ""

F g' guv' hqto c. 'gn' eqtr wu' v' > tleq' f' g' hcu' EI X' j c' t' guw' ncf q' uwo co gpv' g' r tq' f' h' eq⁵³ " f' v' qti c' ko r q' t' v' p' v' gu' j gttco kpv' cu' r ctc' gn' cp' a' ruku' f' g' r' k' pf wut' k' c' cwqo qv' k' 0⁴ " Ukp' go d' cti q. " v' p' k' p' f' q' gp' e' w' gp' v' c' gn' q' d' l' g' v' k' q' f' g' guv' v' guku' gu' r g' v' k' p' gp' v' g' f' guv' c' e' c' t' s' wg' guv' o' c' teq' v' g' > tleq' h' w' g' w' k' k' c' f' q' o c' { qto gpv' c' p' k' x' g' u' f' g' uge' v' t' gu' ge' q' p' > o' k' e' q' u' { " p' q' f' g' h' k' o' cu' k' pf k' k' f' w' c' r' u' 0' R' q' t' guv' o' q' v' k' q' . cni w' p' qu' c' w' q' t' gu' eqo gp' | c' t' q' p' c' r' r' c' p' v' g' c' t' r' ko r q' t' v' p' e' k' c' f' g' c' p' c' r' k' c' t' r' u' f' g' e' k' u' k' p' p' u' f' g' c' e' v' t' gu' gur ge' f' h' e' q' u. " t' go c' t' e' c' p' f' q' r' c' p' g' e' g' u' k' f' c' f' f' g' m' x' c' t' guv' c' p' a' ruku' c' ni' p' k' x' g' n' f' g' r' go r t' g' u' c' * Q' r' k' x' g' k' t' c' g' v' c' r' i' 423; = R' q' p' v' g' { " U' w' ti g' q' p. " 4236 = U' c' n' q' { " \ { n' d' g' t' d' g' ti . " 423; + 0' G' p' r' c' t' v' e' w' r' c' t. " R' c' x' n' f' p' g' n' i' * 423: < 4 + u' q' u' k' p' p' g' s' w' g' " " *existe una gran escasez de análisis en profundidad a nivel de empresa de los vínculos de IED en las periferias integradas* " . "

C' t' c' f' f' g' g' m' q' . " U' c' n' q' { " \ { n' d' g' t' d' g' ti * 4237 + t' g' e' k' p' v' g' o' gpv' g' k' p' e' q' t' r' q' t' c' t' q' p' c' f' k' e' j' q' c' d' q' t' f' c' l' g' gn' e' q' p' e' g' r' v' q' f' g' " *estrategia corporativa* " f' g' u' r' n' g' i' c' f' q' r' q' t' " m' u' guw' f' k' u' f' g' r' c' f' o' k' p' k' u' t' c' e' k' p' f' g' go r t' g' u' c' u' * *management studies* + f' c' p' f' q' h' w' i' c' t' c' w' p' p' w' g' x' q' e' c' o' r' q' f' g' guw' f' k' u' f' g' EI X' g' p' h' e' c' f' q' u' gp' e' c' u' q' u' k' p' f' k' k' f' w' c' r' u' * Q' r' k' x' g' k' t' c' g' v' c' r' i' 423; = U' c' n' q' { " \ { n' d' g' t' d' g' ti . " 423; + 0' G' u' v' c' k' p' e' q' t' r' q' t' c' e' k' p' ko r n' e' c' s' w' g' . " u' k' d' k' p' i' n' u' e' q' p' e' g' r' v' q' u' f' g' " *gobernanza* { " *upgrading* r w' g' f' gp' u' g' t' x' k' r' c' t' c' o' c' t' e' c' t' r' c' p' q' t' o' c' f' g' w' p' u' g' e' v' t' f' c' f' q' . " gu' p' g' e' g' u' c' t' k' q' e' q' p' e' g' p' t' c' t' u' g' gp' r' c' gu' t' c' v' i' k' c' f' g' e' c' f' c' " eqo r t' c' f' q' t' { " x' g' p' f' g' f' q' t' f' g' r' c' e' c' f' g' p' c' r' c' t' c' " gur g' e' k' h' e' c' t' r' c' h' q' t' o' c' f' g' t' g' m' e' k' p' s' w' g' gu' q' u' o' c' p' v' k' p' p' o' p' q' q' d' u' v' c' p' v' g' . " gu' v' q' u' guw' f' k' u' u' g' d' c' u' c' p' gp' x' k' u' k' p' p' u' *mainstream* u' q' d' t' g' r' c' e' e' k' p' ge' q' p' > o' k' e' c' f' g' r' u' GO u' s' w' g' ko r n' e' c' r' g' p' u' c' t' r' u' e' q' o' q' c' i' g' p' v' u' t' c' e' k' p' c' n' g' u' { " o' c' z' k' o' k' c' f' q' t' g' u' . " i' g' p' g' t' c' f' q' t' g' u' f' g' g' z' v' t' p' c' r' k' f' c' f' gu' r' q' u' k' k' x' c' u' . " { " f' g' u' x' k' p' e' w' r' c' f' q' u' f' g' u' w' u' n' i' k' e' c' u' k' p' v' t' p' c' u' . " f' g' r' c' z' r' c' p' u' k' p' f' g' u' w' u' G' u' x' f' q' u' p' c' e' k' p' f' g' q' t' k' i' g' p' { " f' g' u' w' t' g' m' e' k' p' e' q' p' h' u' G' u' v' c' f' q' u' f' g' h' u' r' c' f' u' g' u' t' g' e' g' r' v' t' g' u' 0' F' g' g' u' v' g' o' q' f' q' . " r' r' t' g' u' g' p' v' g' v' g' u' k' u' t' g' e' q' p' p' e' g' h' u' c' r' q' t' v' u' t' g' c' r' k' c' f' q' u' r' q' t' g' n' i' o' c' t' e' q' v' g' > tleq' f' g' r' u' EI X' { " h' u' g' u' h' w' g' t' | q' u' f' g' h' u' c' w' q' t' g' u' "

⁵² C' ni w' p' qu' f' g' h' u' r' c' f' u' s' w' g' u' v' p' k' p' v' i' t' e' f' q' u' gp' h' u' i' k' u' g' o' cu' f' g' r' tqf week' p' t' g' i' k' p' c' n' g' u' . ' v' c' o' d' l' e' p' t' g' r' t' g' u' g' p' v' c' p' e' c' u' q' u' f' g' r' c' f' u' s' w' g' j' c' p' f' g' u' c' t' t' q' m' f' q' k' p' f' w' u' t' k' u' c' w' q' o' q' t' l' e' g' u' h' e' c' n' g' u' r' c' t' c' u' w' u' o' g' t' e' c' f' q' u' k' p' v' t' p' p' u' 0' N' q' u' i' f' b' k' g' u' p' q' g' u' v' p' e' r' i' t' q' u' 0' V' c' k' r' c' p' f' k' c' { " V' w' s' w' f' e' . " r' q' t' g' l' g' o' r' m' q' . " g' u' v' p' h' w' g' t' v' g' o' g' p' v' g' k' p' v' i' t' e' f' c' u' gp' r' r' t' q' f' week' p' t' g' i' k' p' c' n' i' { " o' w' p' f' k' e' n' r' g' t' q' v' c' o' d' l' e' p' v' k' p' p' ko r q' t' v' p' v' u' o' g' t' e' c' f' q' u' k' p' v' t' p' p' u' 0' Q' t' q' g' l' g' o' r' m' q' . " c' w' p' s' w' g' o' a' u' r' g' s' w' g' o' q' . " gu' U' w' i' a' h' t' e' c' . " s' w' g' v' k' e' p' g' w' p' ko r q' t' v' p' v' g' o' g' t' e' c' f' q' k' p' v' t' p' q' . " z' r' q' t' v' t' g' i' k' p' c' m' g' p' v' g' c' n' i' t' g' u' v' f' g' f' h' t' e' c' . " r' g' t' q' v' c' o' d' l' e' p' g' u' v' k' p' v' i' t' e' f' c' u' gp' gn' i' k' u' g' o' c' f' g' r' tqf week' p' g' w' t' q' r' g' q' c' t' c' x' 2' u' f' gn' V' N' E' W' G' / U' C' F' E' O' G' n' e' c' u' q' u' r' g' e' f' h' e' q' f' g' C' t' i' g' p' v' p' c' { " gn' O' g' t' e' q' u' w' { " e' > o' q' gu' c' u' v' p' f' g' p' e' k' u' j' c' p' e' c' o' d' k' e' f' q' c' h' i' n' t' i' q' f' g' n' i' k' i' m' r' c' u' c' f' q' u' g' c' p' c' r' k' c' t' a' p' gp' f' g' v' c' n' g' gp' gn' i' t' > z' k' o' q' e' c' r' f' w' u' q' 0' "

⁵³ R' e' t' c' v' p' c' t' g' e' q' p' u' t' week' p' f' g' h' u' f' h' e' g' t' p' v' u' i' t' w' r' q' u' f' g' c' w' q' t' g' u' { " q' t' i' c' p' k' u' o' q' u' k' p' v' t' p' c' e' k' p' c' n' g' u' s' w' g' j' c' p' c' f' q' r' v' e' f' q' * { " v' t' c' p' u' h' t' o' c' f' q' + g' u' v' g' j' g' t' t' c' o' g' p' v' c' n' i' v' g' > tleq' e' q' p' u' w' n' c' t' F' c' n' g' g' v' c' r' i' 4235 + H' g' t' p' a' p' f' g' l' 4237 + q' R' 2' t' g' l' K' i' a' o' g' l' 423; + 0' "

⁵⁴ C' u' w' x' g' l' . f' k' e' j' c' e' q' p' e' g' r' w' e' r' k' c' e' k' p' j' c' t' g' e' k' d' k' f' q' h' w' g' t' v' u' e' t' f' k' e' c' u' f' g' f' k' x' g' t' u' q' u' c' w' q' t' g' u' s' w' g' r' w' g' f' gp' e' q' p' u' w' n' c' t' u' g' gp' R' q' t' v' c' g' v' c' r' i' 4237 < 47/4: + 0' "

o gpekqpcf qu" r ctc" cpcrk ct" guqu" r tqeguqu" c" plxgn' f g" go r tguc0' Ukp" go dci q." gp" guvc" kpxgunki cekp" ug" eqo r rglk ct" "rc" eqpegr ekp" f g" GO u." uuu" gultcvgi kcu" go r tguclkrqu" { "uuu" ko r cevqu"gp"grf gucttqm"geqp»o leq"gp"r c"lugu'r gtlk? tlequ0'

1.3 – La estrategia empresarial de subsidiarias de Empresas Multinacionales

Nc" ceekp" go r tguclkn' hwg" cpcrk cf c" r qt" f kxkpcu" r gtur gevxcu" { " guewgru" f g" r gpuc" kpvq" c" hq" rti q" f g" r' j kxqt k0' Ukp" go dci q." r' vgt" c" geqp»o kec" pgqer' ulec" r tgu»' r qec" cvpkek" p" c" r' u" ewgukppgu" f g" i qdgt pcp| c" { " gultcvgi k" eqtr qtcvxc" { " go r tguclkn' 0' Guvc" guewgr" eqpegr wcrk »" c" r' go r tguc" eqo q" wpc" hwpek" p" f g" r tqf week" p" s wg" r qugg' kphqto cekp" r gthgevc" { " qr gtc" gp" o gtecf qu" f g" r tqf wvqu" eqo r gvkxqu. " r qt" hq" ewcn" hqu" go r tguclku" ug" xgt" c" p" qdrki cf qu" c" f gur rgi ct" uw' ecr kcnf g" o cpgtc" ghlekpv" g" c" egttct" uuu" pgi qekqu" *Hki uvkp" { " Hggrcpf . " 3; ; 7-0' Gp" guvcu" vgt" c" u" r tko cp" uwr wguqu" s wg" f gvgto kpcp" ceekppgu" wp" kqecu" { " f kgevcu" gp" hqu" go r tguclku" 0' Cuko kuo q." guqu" guwf kqu" eqpukf gtctqp" c" r' u" qti cpl kekppgu" go r tguclkrqu" eqo q" gpvqu" wpxgtucrgu" { " j qo qi 2 pgcu" *J co kxqp" { " Dki i ctv." 3; ; : 40' C" tc" f g" guvcu" eqpegr wcrk cekppgu. " guqu" vgt" tlequ" hwgtqp" et kkecf qu" f guf g" f kxkpcu" a pi wqu0' Rqt" glgo r mq. " wpc" f g" gmqu" tgo ctec" s wg" r tko c" wpc" gphqs wg" dgyvqe2 pvtleqö" { c" s wg" guv" ducuf q" gp" uwr qulekppgu" uqdtg" eqpf kekppgu" kpuwkewkpcrgu" { " uqekrgu" r tqr kcu" f g" r' u" uqekgf cf gu" cxcpl cf cu" f g" Qeekf gpvg" *Dki i ctv." 3; ; 9<3: 40'

Rqt" uw' r ctvg. " hqu" guwf kqu" f g" r' c" f o kpxkcek" p" ug" ducutqp" gp" guqu" uwr wguqu" pgqer' ulequ" r ctc" o qf grct" grf ceekpct" f g" r' u" go r tguc. " cwps wg" hwgi q" hwgtqp" uwo cpf q" eqpvtkdwkppgu" f guf g" qvtqu" eco r qu" f g" guwf kqu. " vrgu" eqo q" r' u" r uleqmi c" . " r' u" uqekqmi c" { " r' u" ekpcku" r qm" kcu" *F qddlp" { " Dcwo . " 4236-0' Wpc" f g" hqu" r tko gtqu" cr qt vgu" c" r' f ghlek" p" f g" *estrategia empresarial* " f g" hqu" guwf kqu" f g" r' c" f o kpxkcek" p" hwg" gudq| cf q" r qt" Cpf tgy u" *3; ; 9+ c" n' f ghktr" eqo q<

Gir' ct»p" f g" f gekkppgu" gp" wpc" eqo r c" c" s wg" f gvgto kpc" { " t gxr" uuu" qdlgvkqu" q" o gvc. " r tqf weg" r' u" r tlekr cgu" r qm" kcu" { " r' r' u" pgu" r ctc" hqi tct" guqu" qdlgvkqu" q" o gvc. " { " f ghkpg" r' i co c" f g" pgi qekqu" s wg" r' go r tguc" xc" c" r' gtugi wkt. " gr' vr q" f g" qti cpl kek" p" j wo cpc" { " geqp»o kec" s wg" gu" q" kpvpc" ugt. " { " r' u" pcwctrg| c" f g" r' u" eqpvtkdwk" p" geqp»o kec" q" pq" geqp»o kec" s wg" kpvpc" dtkpf ct" c" uuu" r tqr kvctkqu. " go r rgef qu. " erkpvgu" { " eqo wpc" cf gu" *Cpf tgy u. " 3; ; 9<74-0'

F g" guv" o qf q. " guqu" gphqs wgu" vepf gp" c" f ct" wpc" i tcp" r qf gt" c" hqu" hcevqtgu" f g" n' o gtecf q. " { " tgrvxc" co gpvr" qeq" r qf gt" c" hqu" hcevqtgu" j kx»tlequ. " r qm" kcu" { " uqekrgu" *F qddlp" { " Dcwo . " 4236+ Cuko kuo q. " hqu" cr qt vgu" f g" hqu" pgi qekqu" kpvtpcekppcrgu" *International Business. " ID+ ug" ducutqp" gp" guqu" uwr wguqu" r ctc" cpcrk ct" r' u" gultcvgi k" f g" r' u" GO u" eqo q" cevqtgu" geqp»o lequ" tcekppcrgu"

s wgr wgf gp'ecrwrc' hqu'equvqu' { 'dgpghlekqu' f' g' h' k' p' v' t' p' c' e' k' q' p' c' e' k' p' f' g' u' w' u' c' e' v' k' k' f' c' f' g' u' } { 'j' c' u' r' c' }
eqpuxwt' b' of grqu's wgr' t' gf' k' e' p' h' u' e' c' o' d' k' u' g' p' d' c' u' g' c' h' u' e' q' u' v' u' { 'r' u' e' q' p' f' k' e' k' p' p' g' u' f' g' b' g' t' e' c' f' q' }⁵⁵
*O qti cp. '4223<7+0''

Ukp'go dcti q. 'f' guf' g' q' t' c' u' e' k' p' e' k' u' u' e' k' c' r' u' u' g' j' c' p' e' t' k' e' c' f' q' g' u' v' u' g' p' h' q' s' w' g' u' r' q' t' f' k' u' k' p' v' c' u' t' c' | q' p' p' u' 0' G' p' r' t' k' o' g' t' n' m' i' c' t' . " u' g' u' u' k' v' g' p' g' s' w' g' g' p' g' u' v' c' n' g' e' w' t' c' u' g' g' p' e' w' g' p' t' c' p' c' w' u' g' p' v' u' e' w' g' u' k' p' p' g' u' x' k' p' e' w' r' c' f' c' u' c' n' r' q' f' g' t' . " r' c' t' g' r' e' k' e' p' e' q' p' g' n' G' u' x' c' f' q' { " q' v' t' u' c' e' v' q' t' g' u' g' e' q' p' » o' k' e' q' u' . { c' s' w' g' g' u' v' e' g' p' t' c' f' c' } g' p' w' p' c' o' k' t' c' f' c' k' p' v' t' p' c' f' g' r' c' n' i' k' e' c' q' t' i' c' p' k' k' e' k' p' c' n' i' * I' c' i' i' g' t' q' . " 4234+0' C' f' g' o' a' u' . " u' k' d' k' e' p' u' g' e' q' p' u' k' f' g' t' c' s' w' g' r' u' r' t' g' u' k' p' p' g' u' e' q' o' r' g' v' k' k' x' c' u' { " r' c' d' A' u' s' w' g' f' c' f' g' g' h' e' k' p' e' k' u' a' p' k' o' r' q' t' v' c' p' v' u' . " f' l' e' j' c' } e' q' o' r' g' v' p' e' k' q' e' w' t' g' f' g' p' v' t' q' f' g' w' p' e' q' p' v' z' v' q' j' k' u' » t' l' e' q' { " t' g' i' w' r' v' t' k' q' c' n' c' o' g' p' v' g' g' u' t' w' e' w' t' c' f' q' 0' N' c' u' r' t' g' u' k' p' p' g' u' e' q' o' r' g' v' k' k' x' c' u' r' w' g' f' g' p' n' g' x' c' t' c' r' u' u' g' o' r' t' g' u' c' u' c' c' n' g' t' c' t' u' w' u' g' u' t' c' v' g' i' k' u' r' g' t' q' r' u' u' p' w' g' x' c' u' g' u' t' c' v' g' i' k' u' s' w' g' g' r' i' k' i' g' p' g' u' v' p' o' q' n' f' g' c' f' c' u' r' q' t' r' c' r' q' i' k' e' c' r' A' d' r' e' c' . " r' c' k' o' k' c' e' k' e' p' . " r' c' r' q' u' k' e' p' g' p' r' c' t' g' f' . " g' n' r' q' f' g' t' { " r' c' e' u' w' e' r' k' f' c' f' j' k' u' » t' l' e' c' * F' q' d' d' l' p' { " D' c' w' o' . " 4236+0' Q' v' t' c' e' t' k' e' c' k' o' r' q' t' v' c' p' v' g' c' r' u' } g' u' w' f' k' u' f' g' r' c' f' o' k' p' k' u' t' c' e' k' e' p' { " f' g' r' u' p' g' i' q' e' k' u' k' p' v' t' p' c' e' k' p' c' r' u' g' u' s' w' g' g' z' c' o' k' p' c' p' r' u' u' e' c' o' d' k' u' } q' t' i' c' p' k' c' v' k' x' q' u' f' g' r' u' u' g' o' r' t' g' u' c' u' u' l' p' v' g' p' g' t' g' p' e' w' g' p' v' c' r' u' u' t' c' p' u' h' q' t' o' c' e' k' p' p' g' u' f' g' n' e' c' r' k' e' r' k' u' o' q' { " f' g' n' i' G' u' x' c' f' q' c' h' i' r' c' t' i' q' f' g' n' i' v' g' o' r' q' * I' w' k' n' p' . " 4225<736+0'

Gp' r' c' t' v' e' w' r' c' t' . " r' c' u' e' k' e' q' m' i' k' e' g' e' q' p' » o' k' e' c' u' g' c' n' g' l' c' f' g' n' i' c' d' q' t' f' c' l' g' g' e' q' p' q' o' k' e' k' u' v' c' f' g' r' u' u' g' o' r' t' g' u' c' u' . " g' p' g' n' e' w' c' n' u' g' r' u' u' g' p' v' k' g' p' f' g' e' q' o' q' c' i' g' p' v' u' u' w' p' k' e' t' k' u' o' c' z' k' o' k' c' f' q' t' g' u' f' g' k' p' h' q' t' o' c' e' k' e' p' e' q' o' r' n' g' w' { " t' c' e' k' p' c' r' k' f' c' f' r' g' t' h' e' v' c' { " r' t' q' r' q' p' g' p' w' g' x' c' u' x' c' t' k' e' d' r' u' r' c' t' c' g' n' i' c' p' a' r' i' k' u' f' g' r' u' u' h' k' t' o' c' u' 0' R' c' t' c' } H' i' k' i' u' v' k' p' { " H' i' g' g' n' c' p' f' * 3 ; ; 7 < 62 + g' n' i' o' g' l' q' t' g' p' h' q' s' w' g' r' c' t' c' g' u' v' g' q' d' l' g' v' q' f' g' g' u' w' f' k' u' u' g' t' g' c' r' k' c' f' g' u' f' g' g' n' i' } 2 p' h' c' u' k' i' g' p' e' » o' q' r' c' j' k' u' v' t' k' e' { " r' u' u' t' g' r' e' k' e' k' p' p' g' u' u' e' k' c' r' u' u' k' e' k' f' g' p' g' p' r' u' u' t' g' r' e' k' e' k' p' p' g' u' g' e' q' p' » o' k' e' c' u' g' } k' p' u' k' w' e' k' p' c' r' u' 0' N' c' u' h' k' t' o' c' u' . " e' q' o' q' q' v' t' c' u' q' t' i' c' p' k' k' e' k' p' p' g' u' u' e' k' c' r' u' u' u' a' p' g' z' r' t' g' u' k' p' p' g' u' f' g' w' p' q' t' f' g' p' u' e' k' e' n' g' k' o' r' r' e' c' p' w' p' c' d' c' p' l' e' q' f' g' r' q' u' k' d' r' u' g' c' e' e' k' p' p' g' u' r' g' i' k' o' c' u' * H' i' k' i' u' v' k' p' { " H' i' g' g' n' c' p' f' . " 3 ; ; 7 + 0' U' k' d' k' e' p' g' z' k' u' v' p' t' c' e' k' p' c' r' k' f' c' f' g' u' g' e' q' p' » o' k' e' c' u' . " g' u' c' u' p' q' u' a' p' k' f' 2 p' v' e' c' u' . " { " o' g' p' q' u' w' p' c' h' w' g' t' | c' p' c' w' t' c' n' i' k' p' f' k' h' g' t' g' p' e' k' f' c' . " u' l' p' q' s' w' g' x' c' t' k' e' p' u' w' u' c' p' v' k' x' c' o' g' p' v' g' e' q' p' r' c' j' k' u' v' t' k' e' . " e' w' r' w' t' c' g' k' p' u' k' w' e' k' p' p' g' u' f' g' e' c' f' c' } u' e' k' e' g' f' c' f' * D' i' i' c' t' v' . " 3 ; ; 9 < 42 + 0' N' c' u' q' t' i' c' p' k' k' e' k' p' p' g' u' g' e' q' p' » o' k' e' c' u' g' u' v' p' k' p' u' g' t' v' c' u' g' p' r' u' u' r' c' v' t' q' p' p' u' f' g' g' p' v' g' p' f' k' o' k' e' p' v' q' f' g' u' e' k' e' g' f' c' f' g' u' o' a' u' c' o' r' r' i' c' u' g' p' f' q' p' f' g' u' g' g' p' e' w' g' p' t' c' p' { " f' g' u' c' t' t' q' m' c' p' * H' i' k' i' u' v' k' p' . "

⁵⁵ Ncu'vgt' f' c' u' f' g' r' t' q' r' q' p' p' w' p' c' o' u' w' r' g' t' c' e' k' e' p' o' f' g' r' u' u' g' u' w' f' k' u' p' g' q' e' n' i' u' l' e' q' u' r' q' t' u' w' u' r' t' q' d' r' g' o' c' u' r' c' t' c' g' z' r' r' e' c' t' g' n' i' e' t' g' e' l' o' k' e' p' v' q' f' g' r' u' u' G' O' u' g' p' r' c' u' g' i' w' p' f' c' o' k' c' f' f' g' n' i' u' k' i' m' i' Z' K' Z' * E' c' u' u' q' p' . " 423 : < 588+0' G' n' i' g' u' w' f' k' u' p' g' q' e' n' i' u' l' e' q' o' k' e' t' q' g' e' q' p' » o' k' e' q' g' p' v' g' p' f' c' c' r' u' u' h' k' t' o' c' u' f' g' h' q' t' o' c' j' q' o' q' i' 2 p' g' c' e' q' o' q' w' p' c' h' w' p' e' k' e' p' f' g' r' t' q' f' w' e' e' k' e' p' * M' g' o' r' . " 3 ; 93+ : { " g' n' i' h' w' g' k' p' v' g' p' c' f' q' f' g' z' r' r' e' c' t' r' q' t' r' u' u' v' g' t' f' c' u' f' g' r' u' u' c' o' s' t' o' s' d' e' t' r' a' n' s' a' c' c' i' o' n' s' w' . " e' c' o' d' k' e' p' f' q' c' n' i' w' p' q' u' u' w' w' e' u' v' u' r' r' t' q' r' q' p' f' s' w' g' r' c' k' p' v' t' p' c' r' k' k' e' k' e' p' f' g' r' u' u' t' c' p' u' c' e' e' k' p' p' g' u' f' g' p' v' t' q' f' g' r' u' u' l' g' t' c' t' s' w' f' c' u' f' g' r' u' u' g' o' r' t' g' u' c' u' u' w' i' k' e' e' q' o' q' w' p' c' t' g' u' r' w' e' u' c' g' e' q' p' » o' k' e' c' t' e' k' p' c' r' i' n' i' t' c' e' c' u' q' f' g' q' v' t' c' u' h' q' t' o' c' u' f' g' g' t' i' c' p' k' c' t' r' u' u' t' c' p' u' c' e' e' k' p' p' g' u' c' t' c' x' 2 u' f' g' r' u' u' h' t' q' p' v' t' c' u' p' c' e' k' p' c' r' u' * E' q' c' u' g' . " 3 ; 82 = Y' k' r' i' c' o' u' q' p' . " 3 ; 9 ; + 0' G' n' i' v' c' d' c' l' q' f' g' D' w' e' m' g' { " E' c' u' u' q' p' * 3 ; 98 + g' u' e' q' u' k' f' g' t' c' f' q' e' q' o' q' g' n' i' g' z' v' q' e' r' x' g' s' w' g' x' k' p' e' w' r' c' g' n' i' g' p' h' q' s' w' g' f' g' n' i' e' q' u' q' f' g' t' c' p' u' c' e' e' k' e' p' { " r' c' v' g' t' f' c' f' g' r' c' k' p' v' t' p' c' r' k' k' e' k' e' p' e' q' p' g' n' i' g' u' w' f' k' u' f' g' h' u' p' g' i' q' e' k' u' k' p' v' t' p' c' e' k' p' c' r' u' 0' F' g' g' u' c' u' f' k' u' e' w' u' k' p' p' g' u' f' g' x' k' e' p' g' r' c' k' p' h' w' f' g' p' v' g' v' g' t' f' c' f' g' n' i' o' r' c' t' c' f' k' i' o' c' g' e' i' f' e' v' e' q' o' f' g' F' w' p' p' k' i' * 3 ; 99+ . " r' c' e' w' c' n' i' u' u' k' v' g' p' s' w' g' r' u' u' h' k' t' o' c' u' r' q' u' g' g' p' e' l' g' t' v' c' u' e' c' r' c' e' k' f' c' f' g' u' { " c' v' t' k' d' w' q' u' * o' w' n' e' r' s' h' i' p' a' s' s' e' t' s' + s' w' g' u' p' t' g' h' g' l' c' f' q' u' g' p' u' w' u' d' k' e' p' p' u' { " u' g' t' x' l' e' k' u' { " f' g' v' g' t' o' k' p' c' p' g' n' i' r' q' v' g' p' e' k' n' i' g' p' u' u' u' l' p' x' g' r' u' k' p' p' g' u' g' p' g' n' i' g' z' v' t' k' q' t' 0' }

3; ; 2=I wknf p."3; ; 6=0Rqt"m"vcpvq."f kgt gpvqu"vr qu"f g"o gtecf q"{"f kgt gpvqu"vr qu"f g"ht o cu" go gti gp"eqo q"t guwncf q" f g"ru"vc { gevqt kcu"j kuv»tlecu" f g" f kuvpvcu"uqekf cf gu" {"cn"lpvgtkqt" f g" gmcu"O qti cp."4223<: +0

C"uw'xgl . "Hki uvglp" *3; ; 2+'uquvkgpg's wg"mqu"cevqt gu's wg"eqpvt qncp"qti cpk cekqpgu" f gdgp" lpvgr tgvct"uwu"eco r qu"qti cpk cekqpcrgu" {"nwi q"mgxct" c"ecdq"ru"r qn"lecu" f g"rc"qti cpk cekp." dcuf cu"gp"uwu"ngewtcu" f gn'eco r q0Guv"r qn"lec" guvct" a f grko kcf c"r qt"rc"n»i lec"lpvgtpc" f g"rc" qti cpk cekp."m"s wg"guvqu"cevqt gu"eqp qegp."e»o q"guvqu"cevqt gu"r gtekdgp"gn'o wpf q" {"m"s wg" f ghkpcp"eqo q"wp"cevkwf" qti cpk cekqpcn'cr tqr kcf c" *Hki uvglp."3; ; 2."4223+0Cu" "ru"r t^a evlecu" qti cpk cekqpcrgu" tgr t gupvcp" guctvgi kcu" f g"eqpvt qn's wg"ukt xgp"r ctc"ngi kko ct"ru"guv wewtcu" f g" o cpf q" {"c"o gpwf q." go r ncp" gpvpgf ko kpvqu" ewwvctrgu" cn'j cegt m0' Vcrgu"r t^a evlecu" pq"ug" f guvct qncp"cn'ct. "ukpq" s wg"ug" hqto cp" c' r ct vt" f g" r cvt qpgu" f g" lpvgt ceekp" r tggz kuvpvcu"0Rqt"m" vcpvq."rc" go r t guc"lpf wut kn'gu"wp"cf cr veekp"o qf gtpc"eqo r nglc" f g" r cvt qpgu"r tggz kuvpvcu" f g" f qo kpek»p" c" ukwcekqpgu" geqp»o lecu" gp" ru" s wg" rc" i cpcpek." rc" ghkekpek" {"gn' eqpvt qn' i gpgtcm gpv' hqto cp"ru"eqpf lekqpgu"o kuo cu" f g"gz kuvpek" *J co knqp" {"Dki i ctv."3; ; : <76+0"

Cuko kuo q."Hki uvglp" *3; ; 8+'r tqr qpg"lpf ci ct"gp"guv"tgrcekp" c" r ct vt" f g"gpvpgf gt" s wg" j c {"f qu"vr qu" f g" guctvgi kcu"grdqctf cu"r qt"ru"go r t gucu"r qt"wp"rcf q."cs wmcu"geqp»o lecu." f guvpcf cu" c" eqqr gtct" eqp"uwu"eqo r gkf qtgu" guvdrgekpgf q" eqpvt qrgu" f g" r tgekqu." etgcpf q" dctt gtcu"r ctc"rc"gpvctf c" f g"vctcu"ht o cu."ko kcpf q"rc"r tqf weekp."q"ngxcpf q"cf grpvgr" t qeguqu" f g"lpvgt tcekp" q" f kxgtuklecekp=" r qt" qvtq"rcf q."ru" guctvgi kcu"r qn"lecu." s wg" eqpmgxcp"rc" lpvgt xgpek»p" guvcn' {"gn' guvdrgeklo kpvq" f g" f gvto kpcf cu"tgi wcekqpgu" s wg" tghnglcp" c"o gpwf q" nqu"lpvgt gugu" qti cpk cf qu" f g" wp" eqplwpvq" f g" go r t gucu"0' Gu"r qt" guv" s wg." r ctc" epcrk ct"ru" guctvgi kcu" go r t guct krgu." f gdgo qu"eqpukf gtct" vcpvq"gn'vr q" f g"lpvgt ekp"ugevqt kn'f gur ngi cf q" r qt"ru"go r t gucu"eqo q"rc"tgrcekp" guvdrgekf c"gpvt g"ru" guctvgi kcu" f g"lpvgt ukp." f g"ect^a evgt" o letqgeqp»o leq." {"rc"lpvgt xgpek»p"gp"gn'ukvgo c"r qn"leq."q" guctvgi kcu"r qn"lecu"0' Guv" uwr qpg" eqpukf gtct" s wg"rc"ko r ngo gpvcekp" f g"wp" guctvgi kcu" go r t guct kn'gu"wp"r t qegu"eqo r ngl" s wg" eqpmgxc"wp"r ct vewrt" hgewt c" f g"rc" ukwcekp" f g"rc" go r t guc" {"wp"r tq { geekp" c"o gf kcpq"r rc" | q" f g"rc"o kuo c."kf gpv"lecekp" q"qr qt wpkf cf gu" {"r grki tq" f g"cevgt f q" c"mqu"t gewtuqu"eqp"mqu" s wg" ewgpc" *P cxcttq."4242+0

Cj qtc"dlgp."ru"GO u"uqp"wp"vr q" f g"qti cpk cekp"r ct vewrt" s wg."r qt" f ghkpek»p."vkgpg"rc" ectcevgt"lvk" f g"qr gtct" gp" f kuvpvcu"r c"lgu" {"guq"i gpgtc" wp"pkxgn'o^a u" f g"cp^a ruku" s wg"ru" go r t gucu" pcekqpcrgu"0⁶ Ugi Àp" rc" Eqphgt gpek" f g"ru" P cekqpgu" Wpkf cu" uqdtg" Eqo gtekl" {"

⁵⁶"Nqu"guwf kqu"uqdtg"ru"GO u'o qf gtpcu"vkgpg" f kuvpvcu"qt"l' gpgu" f gr gpf kpgf q" f g"uw"guvgr" f g"r gpuclo kpvq0' F guf g"rc"tcf leekp"o ctz krc." f kuvpvcu"cevgt gu"eqp vpwct q"rc"vku" f g"O ctz" *3; 8: <747/757+uqdtg"rc" *concentración* {" *centralización* f gn'ecr kn'"Dwlctlp."3; 49=J khtf lpi."3; 2; +s wg"nwi q" f g"tkxctq"gp"mqu" f gdcvqu"gp"vtpq"cn'

F gucttqmq *WP EVCF . 'r qt 'uwu'uki rcu'gp'kpi r? u+'rcu'GO u'uqp<"empresas que comprenden al menos una firma matriz y una filial extranjera. Una empresa matriz se define como una empresa que controla los activos de otras entidades en países distintos de su país de origen, generalmente mediante la posesión de una determinada participación en el capital social"

*WP EVCF . "4229<467+07" Wpc" hkdcln'gz vtcplgtc'gu'wpc'go r t guc'gp'rc' s wg'wp'kpxgtuqt. 's wg'gu' t gulf gpvg' gp'qvtc'geppqo 'f' r qugg'wpc'r ct vlek r cek>p' s wg'r gto kg'wp'kpvgt² u'f vtcf gtq' gp'rc' i guk>p'f g'guc'go r t guc⁰"

Nc" gzc r cpuk>p' f g'rcu'GO u'guv^a "rki cf c'c"rcu'ectcevt' f u'lecu'f g'rc' kpxgtuk>p' Gz vtcplgtc' F kt gev<" *KGF +0Nc" KGF "gu'wp'r tqeguq' hkpcektq' cuqekcf q'c'rc'qr gtcek>p' f g'eqo r c' o' f'cu'gp'cni' o gpqu'wp'r c' f' u' r qt' hwtg'c' f' g'lw'r c' f' u' f' g' qtki gp0Guv' vkr q' f' g' kpxgtuk>p' ug' f' kuki w' f' g'rc' kpxgtuk>p' f' g' r qt' vchqkq. "gp'rc' ewcn' kpf kxkf wqu' q' kpukwekppgu' hkpcektcu' eqo r tcp' wp' r qtegp' vclg' o gpqt' f' g'rcu' ceekppgu' f' g'rc' go r t guc' gp' qvtq' r c' f' u' Guv' ug' j' ceg' eqp' rc' gzc r gev' v' x' c' f' g' s' wg' gn' r' t gek' q' f' g' f' lej cu' ceekppgu' cwo gpvg' gp' gn' hwwtq' r ctc' r qf gt' i' gpgtc' t' wpc' i' cpcpek. "r gtq' guxu' pwxqu' ceekppku' pq' v' kpgp' kpek' gpek' gp'rc' cf o' kpxgtuk>p' f' g'rc' go r t guc' pk' eqo r tqo kuq' c' rti q' r rcl' q' eqp' rc' go r t guc' f' gn' r' c' f' u' t' gegr vqt' *Eqj gp. "4229<59+0Nc" vpgpek' f' g' o' a' u' f' g' wp' 32' f' gn' ecr kcn' xq' v' p' v' gu' eqpuk' g' t' c' f' c' gn' wo' d' t' c' n' o' f' p' k' o' q' s' wg' f' hgt' gpek' c' rc' KGF' f' g' rc' kpxgtuk>p' f' g' r' ectvgtc. { c' s' wg' r' gto' kg' v' p' gt' wp' i' t' c' f' q' uki' p' h' k' e' c' v' x' q' f' g' k' p' h' w' g' p' e' k' gp' rc' i' guk>p' f' g' rc' go r t guc⁵⁸"

*I cte' f' p' { 'N' r' g' l' . "4242<8+0

Nc" KGF " r wgf g' ci twr ctug' gp' f qu' i' t' c' p' f' gu' emuk' h' e' c' e' k' p' p' u' < greenfield brownfield" { " xgt v' k' e' n' l' j' q' t' k' q' p' v' c' r' 0' Nc' kpxgtuk>p' greenfield" gu' cs' w' g' m' c' gp' rc' ewcn' ug' j' c' w' k' k' c' f' q' p' w' g' x' q' e' c' r' k' c' n' i'

ko r g' t' k' e' r' k' u' o' q' { 'rc' et' g' c' e' l' e' p' f' g' o' q' p' q' r' q' r' k' u' *Ngp' k' p' . 3; 39= Nwz' go' d' w' t' i' q' . 3; ; + { 'o' a' u' v' c' t' f' g' gp' rcu' v' g' q' t' f' u' q' d' t' g' gn' e' c' r' k' c' n' i' o' q' o' q' p' q' r' q' r' k' u' c' *D' c' t' e' p' { 'Uy' g' g' l' { . 3; 88+0Gp' gn' i' e' c' o' r' q' f' g' r' u' q' u' w' f' k' u' f' g' r' c' f' o' k' p' k' u' t' c' e' k' > p' . r' u' q' r' t' l' o' g' t' q' u' c' p' v' e' g' f' g' p' v' u' f' g' g' u' w' f' k' u' u' k' u' g' o' a' v' e' q' u' u' q' d' t' g' g' u' v' c' v' g' i' k' u' f' g' GO u' r' w' g' f' gp' g' p' e' q' p' v' t' c' u' g' gp' E' j' c' p' f' n' g' t' *3; 84+ { 'gn' r' k' q' p' g' t' i' t' w' r' q' f' g' u' w' f' k' u' Harvard Multinational Enterprise Project, s' w' g' t' c' f' k' i' k' f' q' r' q' t' T' c' { 'X' g' t' p' q' p' { 't' g' c' r' i' k' c' d' c' g' u' w' f' k' u' go' r' f' l' e' q' u' c' i' t' c' p' g' u' e' c' n' f' g' r' c' u' GO u' Q' t' q' q' t' k' i' gp' f' g' v' t' c' d' c' l' q' u' r' k' p' p' t' q' u' u' q' d' t' g' GO u' r' t' q' x' k' e' p' p' f' gn' g' u' w' f' k' u' f' g' K' D' . gp' gn' ewcn' ug' f' gu' c' e' c' e' gn' r' c' r' q' t' v' g' h' w' p' f' c' f' q' t' f' g' U' y' r' j' gp' J' { o' g' t' *3; 82+ s' w' g' h' w' g' i' q' k' p' u' r' k' t' > c' w' p' c' u' g' t' g' f' g' v' t' c' d' c' l' q' u' k' p' h' w' f' g' p' v' u' gp' g' u' v' g' e' c' o' r' q' . c' r' i' g' u' e' q' o' q' F' w' p' p' k' i' { 'C' r' i' k' d' g' t' *3; 93+ . F' w' p' p' k' i' { 'N' w' p' f' c' p' *422: + q' E' c' p' y' g' n' i' { 'P' c' t' w' r' c' *4223+0

⁵⁷ G' r' i' b' c' { q' t' o' c' t' i' g' p' f' g' c' e' e' k' > p' f' g' r' c' u' GO u' e' q' o' q' u' w' e' g' p' v' t' c' r' i' k' c' f' gp' rc' q' t' i' c' p' k' c' e' k' > p' g' e' q' p' > o' k' e' c' k' p' v' t' c' e' k' p' c' e' k' p' c' n' i' g' p' g' t' > " f' g' d' c' v' g' u' gp' v' q' t' p' q' c' u' w' k' p' f' g' r' g' p' e' k' c' q' p' q' f' g' u' w' u' G' u' v' c' f' q' u' p' c' e' k' p' c' r' g' u' f' g' q' t' k' i' gp' *home country+0Gp' f' lej q' f' g' d' c' v' g' g' z' l' u' n' g' p' v' t' g' u' i' t' c' p' f' g' u' t' g' u' r' w' g' u' c' u' 0' Nc' r' t' l' o' g' t' c' u' u' v' k' p' g' s' w' g' u' c' u' h' k' o' c' u' u' q' p' c' e' v' t' g' u' i' m' d' c' r' g' u' { 'g' u' v' p' e' q' p' h' t' o' c' p' f' q' w' p' c' p' w' g' x' c' e' r' u' g' e' c' r' k' e' r' k' u' c' o' w' p' f' k' e' n' *J' c' t' f' v' { 'P' g' i' t' k' 4222= T' q' d' k' p' u' q' p' . 4235. 4236= U' c' u' g' p' . 3; ; 8. 4229= U' t' c' p' i' g' . 3; ; 8+0Nc' l' u' g' i' w' p' f' c' e' q' o' r' c' t' v' g' e' q' p' r' t' l' o' g' t' c' r' e' k' f' g' c' f' g' s' w' g' gn' e' c' r' k' e' n' i' t' c' p' u' p' c' e' k' p' c' n' i' g' u' d' l' e' c' gp' rc' e' A' u' r' k' f' g' f' gn' r' q' f' g' t' o' w' p' f' k' e' n' r' q' t' g' p' e' k' o' c' f' g' r' u' G' u' v' c' f' q' u' { 'rc' i' g' q' r' q' i' l' e' c' . u' k' p' go' d' c' t' i' q' . p' q' r' u' e' c' t' c' e' v' t' k' c' e' q' o' q' w' p' e' c' r' k' e' n' i' m' d' c' n' u' k' p' q' s' w' g' f' c' e' w' g' p' c' f' g' w' p' c' p' e' r' c' l' g' v' g' t' k' q' t' k' e' n' *C' o' k' p' g' v' c' r' i' 0' 3; ; 4= F' q' u' U' c' p' u' q' u' . 4233= J' q' r' n' k' u' { 'Y' c' m' g' t' u' v' g' l' p' . 3; 99. 3; ; 8+0 R' q' t' A' n' l' o' q' . w' p' v' g' e' t' g' i' t' w' r' q' g' u' v' c' d' r' e' g' e' s' w' g' u' v' q' u' i' t' c' p' f' g' u' e' c' r' k' e' r' g' u' p' q' u' g' j' c' p' e' q' p' h' t' o' c' f' q' e' q' o' q' w' p' c' e' r' u' g' e' c' r' k' e' r' k' u' c' i' m' d' c' n' e' q' o' q' v' c' o' r' q' e' q' e' q' p' v' t' q' n' p' b' h' u' G' u' v' c' f' q' u' f' u' w' i' c' f' l' u' f' g' q' t' k' i' gp' *G' x' c' p' u' 3; ; 9= H' i' k' i' u' v' g' l' p' . 4223. 4232= J' c' t' x' g' l' . 4227= M' i' c' u' p' g' t' . 3; 98. 3; ; = O' c' p' u' . 3; ; 9+0G' u' v' c' f' k' e' w' u' l' s' p' g' u' v' c' w' u' g' p' v' g' p' r' u' f' g' d' c' v' g' u' f' g' K' D' { c' s' w' g' u' v' q' u' g' u' w' f' k' u' u' g' j' c' p' e' g' p' t' c' f' q' gp' g' p' v' g' p' f' g' t' e' > o' q' r' c' u' h' i' k' e' r' g' u' f' g' GO u' u' g' x' k' p' e' w' r' c' p' e' q' p' r' u' f' k' u' k' p' v' q' u' g' p' v' t' p' q' u' k' p' u' k' w' e' k' p' c' r' g' u' p' c' e' k' p' c' r' g' u' r' g' t' q' u' k' p' v' g' r' t' g' v' t' c' g' u' v' q' u' e' q' o' q' r' c' t' v' g' f' g' w' p' u' k' u' g' o' c' l' g' t' a' t' s' w' e' q' o' w' p' f' k' e' r' g' p' g' n' e' c' o' r' q' f' g' r' c' i' g' q' r' i' l' e' c' *D' q' w' u' g' d' c' c' { ' O' q' t' i' c' p' . 4236< 5+0' R' e' t' c' r' t' q' h' w' p' f' k' c' t' c' e' g' t' e' c' f' g' n' i' v' g' o' c' f' g' r' c' n' a' c' i' o' n' a' l' i' d' a' d' gp' GO " e' q' u' u' w' a' c' t' T' g' e' n' g' p' f' t' g' g' u' g' v' c' r' i' 0' *4244+0

⁵⁸ U' k' i' r' v' g' p' g' p' e' k' c' u' w' r' g' t' c' gn' 72' ' u' g' j' c' d' r' e' f' g' e' q' p' v' t' q' r' i' 0'

r ctc'gucdrgegt'wpc'pwgxc'hrkcrORqt'gnleqvtctkq.'rc'kpxgtukp'brownfield'ug'tghktg'c'rc'kpxgtukp'
 swg'gu'gn'tguwncf'q'f'g'wpc'hwukp'q'cf's'wkulek'p.'r'qt'm'q's'wg'pq'cr'qt'vc'pwgxcu'kpxgtukqpgu'c'rcu'
 kpuvncckqpgu'r'tqf'wekxcuORqt'qvtq'rc'f'q.'rc'g'zr'cpukp'xgt'v'ecni'kpgp'hw'ct'ewcpf'q'wpc'eqo'rc'°'c'
 gucdrgeg'uwu'ce'v'x'qu'{'uwu'go'rc'ngcf'qu'o'°'u'cni'f'g'uwu'ht'qp'vgtcu'eqp'gn'r'tqr'»'ukq'f'g'cugi'vtctug'
 gn'luwo'kpkwtq'f'g'o'c'vgt'kcu'r'tko'cu'q'kpuwo'qu'°'g'zr'cpukp'xgt'v'ecni'j'cekc'cvt'°'u'±.'q'rc'f'kwt'kdwek'p'{'
 xgpvc'f'g'dl'kpgu'{'ugt'x'lekqu'°'g'zr'cpukp'xgt'v'ecni'j'cekc'f'gn'p'v'g-0'Ncu'eqpf'kekqpgu'r'ctc's'wg'wpc'
 o'w'k'p'cek'q'pcn'ug'eqo'rt'qo'gvc'eqp'rc'g'zr'cpukp'xgt'v'ecni'gp'gn'g'z'v'cpl'gt'g'g'v'ct'c'p'f'cf'cu'r'qt'rc'
 g'z'k'v'g'pek'f'g'x'gp'v'lcu'eqo'rc'ctc'v'kxcu'gp'uw'f'g'uk'p'q⁵⁹'{'rc'k'p'egt'v'k'f'wo'dt'g't'gn'v'kxc'c'n'luwo'kpkwtq'{'
 rc'gur'gek'hek'f'cf'f'g'iqu'ce'v'x'qu'°'I'w'kn'p.'4226-0"

Rqt'gnleqvtctkq.'rc'g'zr'cpukp'j'qt'k'qp'v'cn'kpgp'hw'ct'ewcpf'q'wpc'eqo'rc'°'c'gucdrgeg'wpc'
 r'rc'pvc'q'w'p'ugt'x'lekq'f'g'f'kwt'kdwek'p'rgl'qu'f'g'uw'o'g'ecf'q'p'cek'q'pcn'eqp'gn'q'dl'g'v'kx'q'f'g'x'gp'f'gt'gp'
 gug'o'g'ecf'q.'r'gt'q'uk'p'c'd'c'p'f'q'p'ct'rc'r'tqf'wek'p'f'g'gug'dl'kpg'q'ugt'x'lekq'gp'uw'r'c'f'f'g'qt'ki'gp'OGug'
 ecuq'ugt'c'p'ht'gew'p'v'g'gp'r't'gug'pek'f'g'd'ctt'gt'cu'r't'q'v'geek'q'p'k'v'cu.'equ'v'gu'f'g'v'c'pur'qt'v'g'g'ng'x'cf'qu.'
 que'k'v'cek'q'pgu'f'guh'x'qt'cd'rgu'f'gn'v'k'q'f'g'eco'dl'q.'q'g'z'ki'g'pek'cu'f'g'cf'cr'v'cek'p'c'rcu'r'gew'k'ct'k'f'cf'gu'
 f'g'rc'f'go'c'p'f'c'nc'ecni's'wg'f'g'uce'q'p'ugl'cp'rc'g'z'r'qt'v'cek'p'f'guf'g'gn'r'c'f'f'g'qt'ki'gp'°'I'w'kn'p.'4226-0'
 Culo'kuo'q.'F'w'p'k'pi'{"N'w'p'f'c'p'°'422:+'t'g'cr'k'ct'q'p'q'tc'°'em'uk'hek'cek'p'°'u'q'dt'g'rcu'g'v'c'v'gi'kcu'f'g'
 k'p'x'g't'uk'p'<'resource-seeking.'efficiency-seeking.'strategic asset-seeking'{'market-seeking.
 Ugi'À'p'g'v'c'v'k'r'q'ni'c'p'rcu'v'g'to'k'p'c'rgu'c'w'q'o'q'v'k'legu'f'g'v'c'tt'q'm'c't'c'p'g'v'c'v'gi'kcu'f'gn'v'k'q'market-
 seeking'f'g'd'k'f'q'c's'wg'f'g'ur'ngi'cp'uwu'k'p'x'g't'uk'q'pgu'g'z'v'c'p'l'gt'cu'gp'd'À'us'w'f'c'f'g'o'c'p'v'p'p'g't'q'
 r't'q'v'gi'gt'nu'o'g'ecf'qu'g'z'k'v'g'p'v'gu'q'r'ctc'g'z'r'ng'v'ct'q'r't'q'o'q'x'g't'p'w'g'x'qu'o'g'ecf'qu'°'F'w'p'k'pi'{"
 N'w'p'f'c'p.'422: +0' "

F'g'g'v'g'°'o'q'f'q.'rcu'hrk'c'rgu'f'g'rcu'GO'u'ug'g'p'ew'g'p'v'c'p'c'v'c'x'g'v'c'f'cu'pq'u»'m'r'qt'rcu'
 eqo'rc'ngl'k'f'cf'gu'f'g'w'p'c'q'ti'c'p'k'c'ek'p'p'cek'q'pcn'uk'p'q's'wg.'cf'go'°'u.'r'qt'gn't'q'n's'wg'l'w'gi'cp'c'n'l'k'p'v'g't'k'q't'
 f'g'w'p'c'eq't'r'q't'cek'p'i'nd'c'n'°'I'j'q'uj'c'n'{'D'c't'v'rg'w.'3; ; 2=°'R't'c'j'c'r'c'f'{'F'q'l'.°'3; ; 9-0'R'q't'iq'v'c'p'v'q.'ug'
 x'g'p'k'p'x'q'w'et'c'f'cu'gp'w'p'f'q'd'rg'l'w'gi'q'<'nc'ecni'gp'rc'k'p'v'g't'c'cek'p'eqp'q'v'c'cu'go'rc'g'v'cu.'i'q'd'k'g't'p'q'u'{'
 en'k'p'v'gu'f'g'w'p'r'c'f'f'{'°'w'p'f'k'c'n'c'n'è'w'o'r'rk't'w'p'r'c'r'gn'f'g'v'g't'o'k'p'c'f'q'g'p'rc'g'v'c't'w'w'c'o'w'p'f'k'c'n'f'g'w'p'c'
 eq't'r'q't'cek'p'{'h'q't'o'c'p'f'q'r'c't'v'g'f'g'w'p'c'g'v'c'v'gi'k'q'r'g't'c'v'kxc'i'nd'c'r'0"

Gp'°'dcug'c'g'v'q.'O'q'ti'c'p'°'4233.'4239+.'uk'i'w'k'g'p'f'q'gn'eq'p'egr'v'q'f'g'incrustación'
 *embeddedness+°'f'g'I'c'p'q'x'g'w'g't.'u'q'v'k'g'p'g's'wg'rc'v'g'p'uk'p'g'p'v'g'rc'°'doble'incrustación'
 *internacional'{'nacional+°'gu'eq'p'uk'w'k'xc'r'ctc'eqo'rc'g'p'f'gt'c'rcu'g'v'c'v'gi'k'f'g'rcu'hrk'c'rgu'f'g'
 GO'u'0'Cu'f'ug'f'k'k'f'g'g'v'c'p'q'ek'p'gp'f'q'u'f'k'o'g'p'uk'q'p'g'u'r'ctc't'g'h'ng'l'c't'rc'uko'w'nc'p'g'k'f'cf'f'g'w'p'c'

⁵⁹J'cd'k'w'c'm'g'p'v'g.'g'v'c'x'g'p'v'c'c'v'k'p'g's'wg'x'g't'eqp'iqu'r't'g'ek'qu'q'rcu'r't'q'f'we'k'k'f'cf'gu'f'g'iqu'rc'v'q't'gu'f'g'r't'q'f'we'k'p'
 eqo'q'gn'è'c'r'k'c'n'gn'v'c'd'c'l'q'{'rc'v'g't'c'0'
⁵'R't'c'g'n'f'g'v'c't't'q'm'f'gn't'g'v'q'f'g'iqu'v'k'qu'f'g'g'v'c'v'gi'k'eq'p'w'nc't'F'w'p'k'pi'{'N'w'p'f'c'p'°'422: +0'

geqppo "i" i mdcn "nu" »tf gpgu"r qn"lequ" g"lpukwekqpcrgu" hci o gpvcf qu" c" plxgr" pcekqpcn" { "nu" tgrcekqpgu" uqekrgu" { "r tqf wekxcu" eqpegvtf cu" mdcn" { "tgi kqpcn gpvg" *J gkf gptglej . "4234-0" Gu" r qt" guvcu" tcl qpgu" s wg" guvcu" qti cpk cekqpgu" j cp" ukf q" f ghkpf cu" eqo q" *espacios sociales trasnacionales* f gdlf q" c" r" kpvgtf gr gpf gpek" gptg" gr gur cekq" kpvtpcekqpcn" { "nu" pcekqpcrgu" *O qti cp. "4233- 639+ Guvcu" gptgetw| co kpvqu" pq" uqm" gu³ p" kpvgi tcf qu" r qt" pqtu cu" { " r tqegf ko kpvqu" hqto crgu. "ukpq" wco dl² p" r qt" tgf gu" kpvgr gtupcrgu" gptg" cnqu" f kt gevku" s wg" vkgpg" s wg" j cegt "ht gpvg" c" nu" f gucl" qu" f g" gpvtpqu" pcekqpcrgu" j gvtqi ² pgqu. "cn" vgo r q" s wg" ug" tg² p" { " eqqr gtcp" gp" pwo gtqucu" tgwpkqpgu. "gxgpqu" uqekrgu" { " r tq { gevqu" vcupcekqpcrgu. " f guctqmpf q" cu" f tgrcekqpgu" kpvtpcekqpcrgu" { " o qf grqu" c" ugi vkt⁰

Grlqdlgvkxq" f g" guvc" r tqr wguvc" gu" cdtk" r" eclc" pgi tc" f g" r" ðo wnkpccekqpcn" s wg" ug" o cpvkgpg" egttcf c" vcpvq" r qt" r" geqppo "i" pgqerf ulec" cn" r gteklk" c" r" go r tguc" eqo q" wp" cevqt" tcekqpcn" wpkctkq" eqo q" r qt" nu" kpvtr tgcekqpgu" f g" r" go r tguc" eqo q" *Ápleco* gpvg" wp" kputwo gpvq" f g" i mdcn" k cel»p" { " gzr mqcel»p⁰ Gp" eco dlq. "r" o wnkpccekqpcn" cs w" ug" r tgugpv" eqo q" wp" *espacio social trasnacional*" ectcevgtk cf q" r qt" o gecpkuo qu" f g" lgtcts w" c" { " f qo kpcel»p" r gtq" wco dl² p" f ghkpf q" r qt" nu" guhwgt| qu" eqpvkpwqu" f g" f kgt gpvqu" i twr qu" uqekrgu" r ctc" f kur wct" guc" lgtcts w" c" { " nu" gutcvgi kcu" c" ugi vkt" *O qti cp. "4239- 4+0"

Nc" ecuc" o cvtk" f g" wpc" GO" gu" f qpf g" ug" gpewgptcp" uwa" qhlekpcu" egpvtcrgu" { " f qpf g" ug" uk² cp" nu" glgewkxqu" o ^a u" cnqu" f g" r" gutwewtc" f g" r" eqo r c° "c⁰ Wpc" eqo r c° "c" r wgf g" f guki pct" wp" r c" ju" r ctc" ju" hkuern" *tax-haven* + eqo q" uw" qhlekpc" egpvtcn" ukp" go deti q. "gp" r" o c { qt" "c" f g" nu" ecuqu. "guvc" ecuc" o cvtk" ug" wdlec" gp" grn" c" ju" f qpf g" guvc" eqtr qtcek»p" eqo gp| » *r c" ju" f g" tqki gp+ *Eqj gp. "4229-0" Eqo q" ug" xgt^a " o ^a u" cf grcpvg. "guvg" gu" gn" ecuq" f g" Vq { qvc" { " f g" r" o c { qt" "c" f g" nu" go r tguc" f g" r" kpf wutk" cwqo qvtk" b" wpf kcrf: "Nc" ecuc" o cvtk" b" cpvkgpg" grleqvtqn" gutcv² i leq" uqdtg" nu" hkrkrgu" f g" vtu" o cpgtcu" r tkpek crgu" < ceekqpgu. "qti cpk cel»p" { " eqpqeko kpvq⁰ Grleqvtqn" qti cpk cvkxq" { " grleqvtqn" f grleqvtqn" kpvq" i gpgtcn gpvg" ug" dcucp" gp" grn" crpeco kpvq" f g" xcrtgu" { " ceekqpgu⁰ Nc" hqto c" gp" s wg" r" o cvtk" glgtcg" grleqvtqn" r cvtko qpkn" uqdtg" r" hkrkn" eqo q" r" gutwewtc" f g" r tqr kgf cf "vqcn" q" r ctekn" q" r" go r tguc" eqplwpc. "f gvto kpc" r" ecvkl cf "f g" kphwvpek" s wg" r" go r tguc" o cvtk" r wgf g" glgtcg⁰ F g" guvg" o qf q. "wpc" o wnkpccekqpcn" s wg" r qugg" wpc" o c { qt" "c" f g" r" 73' "q" o ^a u" f grlecr kcnf g" wpc" uwdukf kctk" r wgf g" cf s vktk" grleqvtqn" cduqnmw" ³ j cq" gv" cn⁰ "4234-0"

C" uw'xgl . "nu" uwdukf kctkcu" gp" grn" gztcp| gtq" f g" r" u" o wnkpccekqpcrgu" gu³ p" eqvtqrcf cu" r qt" r" go r tguc" o cvtk" . o kpvtcu" s wg" cn" o kuo q" vgo r q" r ctvlek cp" gp" wpc" tgrcek»p" eqo r mglc" eqp" vtu" uwdukf kctkcu" chkrkcf cu⁰ Uw" r cr grn" gu" wpc" hwpek»p" f grlukvgo c" f g" tgf "i mdcn" f g" o wnkpccekqpcrgu" { "

⁵: "Wpc" gzegele»p" gp" guvg" ugpvlf q" gu" r" hto c" Ugnmpvu" etgfc" gp" 4243" c" r ctvt f g" r" hku»p" f g" r" u" o wnkpccekqpcrgu" cwqo qvtkegu" Hkrkcf t { urgt " *hkrkpc*" { " guvcf qvplf gpug+ { " RUC" Rgwi gqv" *Rgwi gqv* Ektqgp+ *htcepegucu* . s wg" guvcdgelgtqp" uw'ugf g" egpvtcn" gp" J qrcpf c. "Iwuxco gpvg" wp" r c" ju" eqpukf gtcf q" eqo q" wp" r ctc" ju" hkuern⁰

gu'tgur qpucdng'f g'go r ctglct'mqu'tgewtuqu'kpvtppqu{"gz vgtppqu'f gpvtq'f g'gung'ukungo c{"glgtegt"
 hwpkqpgu'gur ge'lecu'cnpkgcf cu'eqp'gungu'tgewtuqu'Gri'o qvxxq'guntc' i keq'f g'rc'o wnpckekqpcn'
 o cvtk' r tguetldg'rc'o kulop'guntc' i kec'r ctc'rc' hkn'{"f ghkg'elgtvqu'tqngu'r ctc'gmcu.'f guf g'rc'
 gvr c'kpkcn'{"rc'eqphki wtcekop'vgo r tpc0C'r ctvt'f gr'cp' ruku'kpvtppq'f g'mqu'ukungo cu'f g'tgf."
 rcu'hkn'ngu'vkgpp'f kgtgpvgr' qulekqpgu'guntc' i kecu'{"tqngu'gp'wp'ukungo c'f g'tgf' o wnpckekqpcn'⁶²
 * j cq'gv'crl'4234+0F g'gung'o qf q.'f lej cu'f kwpkqpgu'vco dk'p'ko r rlec'p's wg'pq'vqf cu'rcu'hkn'ngu'
 uqp"ki wcrngu'ukpq's wg'gu'pgeguctkq"eqpukf gtct"uw'ect' evgt'f kwpk'vxxq'r ctc'eqo r tgpf gt's w' tqn'
 ewo r ngp'gp'rc'guntwewtc'o wnpckekqpcn'{"r qt'qvtq'rcf q.'j cuvc's w' r wpvq'ug'kpvgi tcp'gp'rc'
 eqo wpk'cf' hqecn'f hwpf kqf q'j cdk'cf gu.'vgepqmi' fcu'{"cr tgpf k'clg'hwgtc'f g'rcu'f' kgu'f g'rc'
 hkn'*O qti cp.'4239<6+0C'lw'xgl.'gucuf' kwpvcu'hkn'ngu'r wgf gp'eqo r gvt'gpvtg'gmcu'f gpvtq'f g'
 rc'o kuo c'guntwewtc'f g'rc'o wnpckekqpcn'c'r ctvt'f g'o glqtcu'f g'r tqf wvxxkf cf.'f gucttqmq'f g'
 vgepqmi' fcu.'qd'vgep'p'f g'lxgtukqpgu.'xgpvcu.'gpvtg'qvtqu'cur gevqu'

Cf go a u.'rcu'f' kgu'f gn'gur cekq'kpvtppq'uqp'r gto gcdngu'rcu'eqpgzkqpgu'*q'rc'hcn'f g'
 gmcu'gpvtg'rcu'cevqtgu'kpvtppq'{"rcu'cevqtgu'g'kpwkwekqpgu'gz vgtppqu'gu'etwecnr' ctc'eqo r tgpf gt"
 e»o q'gung'gur cekq'vcpupcekqpcn' lgt' ts wleq' gu' uwdxgt w'f q.'f guclcf q' {"tgeqput w'f q'0'Rqt'rc'
 vcpvq.'ugi' Ap'O qti cp'*4239+.'wpc'vgt'f'et'lecu'f g'rc'eqtr qtcekop'o wnpckekqpcn'f gdg'vpgt'gp'
 ewgpvc'gung'gur cekq'ucen'vcpupcekqpcn'uw'f kxgtukf cf'kpvtppq'{"uw'r gto gcdk'cf'f g'rcu'f' kgu'
 r ctc'eqo r tgpf gt'rc'f k'p'o kec'f g'rcu'o wnpckekqpcn'{"uwu'ghgevu'gp'rcu'geqpqo' fcu'rcu'crgu'0'

Op' gung'ugp'w'f q.'uki wkgp'f q'c' O qti cp' *4239<38+ rc' eqtr qtcekop'o wnpckekqpcn' gu'
 pgeguctkco gpv'wp'gur cekq' lgt' ts wleq'f qo kpcf q'r qt'kpvtgugu'kpcpekgtqu'gp'rc'ugf g'egpvtcn'
 tgr tgu'pvcf q'gp'rc' *incrustación internacional* f g'rc'hkn'r gtq'gn'gur cekq'kpvtppq'gp'f'gu'o w'f "
 f kxgtuq'{"gu' uw'lgv'c'f kuewukqpgu.'eqph'evqu'{"n'ej cu'0C'uf'gp'rc' *incrustación nacional* f g'rc'
 uwdukf kctk'ug'gpewgpvtcp'rcu'ectcevgt'lecu'r tqr kcu'f g'gunc'w'pk'cf'gp'dcug'c'uw'i gtgpek."
 vcdclcf qtgu.'r tgeguqu'r tqf wvxxqu' {"uwu'x'pewqu'eqp'rcu'cevqtgu' {"qti cpkuo qu'f g'f lej q'
 gur cekq'pcekqpcn'v'ngu'eqo q'eqo r gvk'qtgu.'i qdkgtpqu.'ukpf kec'vqu.'e' o ctcu'go r tgu'ctku.'gve0Gu'
 f gek.'rc'ugf g'egpvtcn'r wgf g'ugt'o w'f "r qf gtquc'r gtq'pq'm'ucdg'vqf q'0'P q'r wgf g'eqp'qeg't'mu'
 f gcrngu'f g'o gtecf qu'r ctvewrtgu.'gp' v'to k'pqu'f g'i wvqu'f gn'eqpuwo kf qt.'tgi w'cekqpgu.'
 eqpf k'kqpgu'rcdqtrgu.'gve0Gung'eqp'qeko k'p'v'r wgf g'gunt'o a u'entq'gp'uwdukf kctkcu'*O qti cp.'
 4239<5+0"

F g'gunc'hqto c.'rc'r tgu'p'v'v'gulu'ug'cnglct' f gn'gpv'p'f ko k'p'v'f g'rc'go r tgu'c'eqo q'wpc'
 ñecl'p'gi tcö'f g'tcekqpcrk'cf' r gthgevc'g'kphqto cekop'eqo r ngvc'ew'q'Ap'leq'hk'gu'gn'f g'rc'

⁶²Xctkqu'guwf kqu'f g'rcu'p'gi qekqu'kpvtppcekqpcn'gu'j cp'lxguk'cf q'rc'tgrcekop'gpvtg'rcu'hkn'ngu'o wnpckekqpcn'gp'
 gn'gz'v'cplgtq'{"uwu'go r tgu'cu'o cvlegu'v'c'p'f q'f g'o qf gnt'rc'ceekop'f g'guncu'go r tgu'cu'*j quj cn'{"Dct'v'gw.'3; ; 2=
 O ctv'p'g' {"lctk'q.'3; ; 3=Rtcj c'ncf' {"F q' .3; ; 9+0'

o czko k celop"fg"wkrf cf gu'Guq"ug"fgvto kpt^a "gp"o c{qt"fgvcmg"gp"gn'r t>zko q'ecr ¶wmq."cn' kptqf wkt"n"vtc{gevtkc"tgekpv"fg"n"lpf wutk"cwqo qvtk"cti gpvkp."o ctecpf q"fkvkpvu" f gugo r g^o qu'gvtg'rcu'vto kpcngu'cwqo qvtkegu."fguce^a pf qug'gn'ecuq"fg"Vq{qvc"gpvtg"gmru'F g" guvg"o qf q."n"lxgunki celop"cpck ct^a "n" guxtcvgi kc"go r tguetkn'fg"guvc"ht^o c"gpvpgf k² pf qrc" eqo q'wp'r tqeguq"eqo r nglq's wg'eqpmgxc'wpc'r ct kwert'ngewtc"fg'rc'ukwcekp"fg'rc"go r tguv"{" wpc'r tq{geekp"co gf kcpq'r n|q"fg'rc"o kuo c."kpet wuxfc"gp"wpc'tgf "eqtr qtcvkx"tcepupcekqpcn' {"gp"gn'gur cekq"uqekn'tgi kqpcn'{"pcekqpcn'Eqo q"ug"r ncpvgt^a "o^a u"cf grcpvg."n" gur gekn' kpet wuxcekp"/vcpvq"kvgt pcekqpcn'eqo q"pcekqpcn'"fg"Vq{qvc"Cti gpvkp"gu"m"s wg"r gto kkt^a " gzn rlect"uw'gzkquq"fgugo r g^o q0'

1.4 – Inversión Extranjera Directa: los efectos de las Empresas Multinacionales en países periféricos

Vnleqo q'ug'fgucttqm>"gp'hqu'cr ctvcf qu'r tgegf gpvgu."n'kvgt r tgvcekp"fg'rcu'GO u'r wgf g" xctkct"fg'gr gpf kppf q"fg'gn'gphqs wg'eqp"gn's wg'ug'rcu'cpcnleg."{."fg'hqto c'uko kret."guvq"uwegf g'eqp" nqu"ko r cevqu"s wg"guvcu"vkpgp"gp"uwu"r c¶ugu"tgegr vqtgu"*host country+0'Guvcu"fkuewukppgu"ug" gpo ctecp"gp"gn'fgdcvg"uqdtg'mu'ghgevqu"geqp>>o lequ"{"uqekngu'fg'rc"KGF"fg'f lej cu'ht^o cu"gp" guvcu"pcekqpcn'Guvcu"xlukppgu"fkhtgp"fg'gr gpf kppf q"fg'gn'gphqs wg"vgtkq"fg'guf g"gn'ewcn'ug" gzc^o kpp"{"r wgf gp"ugt"ci twr cf cu"gp"tgu'i tcpf gu'i twr qu<wpc"xlukp"r qukkxc."qvtc"pgi cvkx"{" wpc"vgtetg's wg'uqukpg's wg'pq'r wgf g'guvdmegtug'wpc'tgi n'i gpgtcn'r ctc"guvg'ko r cevq0'

Cu¶'r ctc'wp'r tko gt'i twr q's wg'o cpvkpg'wpc"xlukp"r qukkxc'r qf t¶'ukwctug'uw'qtki gp"gp" nqu'cwqtgu'en'ulequ'fg'rc'Geppqo ¶c0UKdlgp"guvqu'tcdclqu'pq'ug'gphqecdep"gp'GO u."u¶'uquv¶cp" s wg'rc'kvgt pcekqpcn' celop"fg'rc'cevkxf cf "geqp>>o kec"vtc¶'r tqi tguq'r ctc"vqf cu'rcu'uqekgf cf gu" kpxqmetcf cu"cr ctvt"fg'rc"gur gekn' celop"fg'rc"mqu"r c¶ugu"cr ctvt"fg"uwu"ventajas absolutas" *Uo kj . '3998+q"relativas"*Tlectf q.'3: 39+."fguchkpf q'rc'kf gc'fg'gn'leqo gtekq'kvgt pcekqpcn'leqo q" juego de suma cero"fg'gn'o gtecpvkruo q0Nc'vgt¶'geqp>>o kec"pgqen'ulec."uk'dlgp"vco r qeq'ug"j c" fgvpgf q"gp"gn'cp^a nkuku"fg'rcu'GO u."eqo r ctv¶'rc'kf gc'fg"sg"rc"cr gtwtc"eqo gtekn'{"n" kvgt pcekqpcn' celop"fg'rc"geppqo ¶c"vpg¶c"ghgevqu"fg'eqo r ngo gpvctkgf cf "r qukkxqu"r ctc"mqu" r c¶ugu'kvgt xkpvkv"¶J gemuej gt.'3: 3; =Qj nq.'3: 55+0"

Gp"dcug"cg'guvq."mqu'guwf kqu'fg"KD"ug"dcucp"gp"i tcp'r ctvg"fg'mqu'uw'wguvqu'fg'rc'vgt¶c" geqp>>o kec"pgqen'ulec"r ctc"guwf ket"gur ge¶keco gpvg"cr'rcu'GO u'0'Guvc"guewgn"gpvkpf g"cr'rcu" o wnk pcekqpcn'gu'eqo q'cevqtgu"geqp>>o lequ'tcekqpcn'gu's wg"vqo cp"fg'gekukppgu"uqdtg"guvctvgi kcu" f g'mqecn' celop"uqdtg'rc'dcug"fg'ewgukppgu'fg'ghkvgpek"{"tgpvcdkrf cf "¶Twi o cp.'422; +0'Gp'gn' r tqeguq."f kwpf gp'ecr kcn'vgepqmi ¶c."eqpqelo kppvq"{"j cdkrf cf gu'gp'vqf q'gn'o wpf q0Ug'r gtekdg"

s wg'gucv'kpxgtukppgu'kpggp'ghgevqu'kpf kt gevqu'r qukkxqu" { "f g'cr tgpf k clg's wg'c { wf cp'c'cvtcgt " nwi ctgu" c" r" geqqo "c" o wpf kcn' { "c" ucect" i tcf wcm gpvg" c" r"u" r qdrcekppgu" f g" r" r qdtg| c" *Eqmkpuqp. '422; =Eqmkpuqp'gv'cn'0'4228=F wppkpi " { 'Nwpc'p. '422; +0³'C' r ctvk' f g'gucv'kpxgtukppgu' ug'j cp'tgerk cf q'wpc'i tcp'ecp'kf cf "f g'kpxguki cekppgu's wg'f guwcep'iqu'ghgevqu'r qukkxqu'f g'rc" KGF "gp'r c'f'gu'tgegr vqtgu'*I j cwtk' { 'I co kp. '422; =O g| gt. '4226=P cxctgwk' { 'Xgpcdrgu. '4235+0⁴"

Rqt" qvtq" rcf q. "wpc" xkukp" f kco gvtcm gpvg" qr wguv" r wgf g" j cmctug" gp" qvtq" i twr q" s wg" o cp'kpg'wpc'r gtur gevxc' pgi cvxc' uqdt g'gn'ceekpct' f g'rcu'GO u'gp'r c'f'gu'r g'k'k' tlequ'Uw'qt ki gp" r wgf g'ukwctug'gp'gn'o kuo q'f gucttqm'vgt'lequ' b' ctzkuc" { "o" a u'gur ge'f'keco gpvg'gp'rcu'vgt'f'cu'f gn' ko r g'kcn'uo q. 'gn'ecr kcn'o qpqr qrkuc" { 'rc'f gr gpf gpek'OGp'rc'c'f' f g'guyg'gphqs wg'r wgf g'ukwctug" c'Ngpkp" *3; 38+ 's wkp' tgeqi g'iqu'cr qt vgu'vgt'lequ' f g'J khtgf kpi . 'Dwnj ctkp" { 'J qduqp" { "uqukpgp" s wg'rc'gzr qt'cekp' f g'ecr kcrqu' f g'rcu'go r tgucu' o qpqr » r'ecu'k'vgt'p'cek'p'crk' cf cu'ug' tgerk' cdc" r ctc'eqpugi wkt'wpc'i cpcpek' o "a u'grgxc'f c'gp'r c'f'gu'cvt'cucf qu'f gdf q'c" s wg'iqu'ecr kcrqu'gp'guqu" r c'f'gu'uqp" guccuqu. " { "gn'r tgek' f g"rcu" o cvgt'ku" r tko cu" { "qu'uc'ct'ku" uqp" o gpqt'gu'0'Cu'f' "qu" ecr kcrqu' t'cup'cek'p'crgu' hqto cdep' r ctvg' f g'wpc" *cadena imperial*" gp'rc'ewcn'ug' f gygt'o kpcdc'wpc" *desarrollo desigual*" f g'iqu'f k'k'p'vqu'r c'f'gu'k'pxq'wctcf qu'0"

Nwgi q. "qu" vgt'lequ" p'gqo ctzkuc" f gn'ecr kcn'o qpqr qrkuc" Dctcp" { "Uy ggl { " *3; 88+ tgo ctectqp" s wg'rcu" go r tgucu' t'cup'cek'p'crgu" gp" r" r g'k'k' f k'ki gp" uwu" g'zegf gp'vqu" c" uwu" geqqo "f'cu' f g' qtki gp" egp'tcrgu" { "qd'kpgp" i cpcpek' o c { qt'gu" r tqf wvq" f g"rcu" f k'k'g'pek'cu" uc'ct'krgu" gp" cvk'kf cf gu'eqp"rc" o kuo c" r tqf wv'k'kf cf . "gn'ceegu" r tk'k'gi kcf q'c" qu" t'gewt'qu" pcw'tcrgu" f gn'r r'p'gvc" { "gn'eqp't'qn'f gn'Uk'wgo c" Hk'p'cek'gt'q" k'vgt'p'cek'p'crgu"⁵⁵C" uw'xgl . "r ctc" qu" vgt'lequ" f g"rc'f gr gpf gpek. "gucv'go r tgucu' t'cup'cek'p'crgu" ewo r npp" gn't'qn'f g' t'cup'ht'g'pek' f g" g'zegf gp'v'f guf g'rc' r g'k'k'g'j' cek' gn'egp't'q" *F qu'Ucp'vqu. '3; 95+0'Rctc"2 uqu. 'rcu' o w'k'p'cek'p'crgu"

⁶³Guc' r gtur gevxc' cr q { c'gp' i gpgt'cn'gn'r t'pek' k' f gn'kdt'g'eqo gteq. "rc'gn'o k'pek'p' f g'rcu'dctt'gtcu'eqo gtekrqu" { "gn'f gucttqm' f g'wpc'gut'vewtc" i m'cni's wg'tghwte'g'gn'kdt'g'eqo gteq'c" v'cx² u'f g"rc" Qti cp'k'cek'p' O wpf kcn'f gn' Eqo gteq' *QO E-1" { "qu'v'c'cf qu'k'v'gti w'dgt'pco gp'v'rgu'cu'q'ek'cf qu'0'Cu'w'xgl . 'cr q { c'iqu'f g'g'j' qu'f g'rc'f k'geek'p' f g'rcu'GO u'c'f gek'k' u'qdt'g'rc'gut'v'gi k' f g'rc'go r tguc" { "cuwo g's wg'gucv'f gek'k'p'gu'eqpf wkt' a p'cn'k'p'cn'c'wpc'ghgev" f g'i qvq' f g'dgp'gh'ek'qu'geqp» o lequ" { "u'ek'crgu" *Eqmkpuqp" { 'O qti cp. '422; =O qti cp. '4239+0'

⁶⁴Gp'uw'f'ko gpuk'p" o let'q'geqp» o lec'guc' r'k'g'c'w'c't'j' c'f' k'k'g'pek'f q'rcu'gz'vgt'p'crk' cf gu'r qukkx'cu"gp" of gttco guo" *spillovers+ j' qtk' qp'vrgu" { "xgt'v'ecrgu'0'Nqu" r tko g'qu'ko r r'iecp' s wg'gn'k'pi t'guq' f g'p'w'g'x'cu'GO u'q'gn'c'wo gp'v'gp'rc" eqo r g'v'k'k'kf cf "f g'rcu'k'k'crgu" { c'k'p'uc'rc'f cu'r wgf g'grg'x'ct'gn'k'p'x'gn'f g'eqo r g'v'pek'gp'gn'o gtecf q'f qo² u'w'eq'g'k'p'f wkt'" c'rcu'k'ko cu'ne'crgu's wg'eqo r k'gp'eqp'rcu'gz'v'c'p'l'gtcu" c'grg'x'ct'uw'r tqf wv'k'kf cf " { "l'c" o gl'qt'ct'rc'ec'rk' cf "f g'uwu" r tqf wv'qu" *x'f'ko k'cek'p. 'pp'q'x'cek'p. 'p'w'g'x'cu'k'px'gt'uk'ppgu. 'gve'0'0'Nqu'ugi wpf qu'f g'x'k'p'gp' f g's wg'rcu'k'ko cu'ne'crgu" r wgf gp' d'p'gh'ek'ctug' f g'rcu' v'ep'q'ni "f'cu" { "r' t' a'ev'ecu" qti cp'k' cek'p'crgu" f g"rcu" GO u. "c" v'cx² u'f g"rcu" o c { qt'gu" t'gs wgt'ko k'p'v'qu' f g'ec'rk'cf . "equ'qu" { "l'q" r rc' q' f g'gp'v'gi c' s wg'rcu'k'k'crgu'uw'g'gp'gz'ki k'c" u'wu' r tq'x'gg'f qt'gu" { "f g'rc" g'x'gp'w'cn'c'uk'ng'pek' "v'ep'ek' s wg'rcu'dt'k'p'f gp' r ctc'uc'w'k'c'eg'g'gu'qu' t'gs wgt'ko k'p'v'qu'0'Vco d'k'p'iqu'ne'k'p'v'gu' f g'rcu'GO u' r qf t'p'p' t'gek'k' "ko r c'ev'qu" r qukkx'cu" x'f' f kur q'p'k'k'kf cf "f g'p'w'g'x'cu" q" o gl'qt'gu" o cs w'k'p'ct'ku. "k'puwo qu" q' ugt'x'lek'qu" *I cte'f' { "N» r gl. '4242+0'

⁶⁵Gn'vgo c'f' gn'ecr kcn' O qpqr » r'eq" { "uw'qn'gp" qu" r c'f'gu' r g'k'k' tlequ" f gur gt» wpc" r'cti q' f gdc'v'gp"rc" r'k'g'c'w'c't' o ctzkuc'0'Q'v'qt'cu'w'w'qt'gu" o ctzkuc'cu'et'k'lecp'gn'g'phqs wg'f g'eqo r g'v'pek' o qpqr » r'ec' u'qu'v'p'p'p'f q' s wg'rcu'rg'f gu'f g' eqo r g'v'pek'ecr k'c'rk'uc' s wg'guet'k'f'c' O ctz' u'ki w'p'x'k' i gp'v'qu'gp'rc'c'ew'c'rk'cf " { "s wg'p'q'gu'gp'rc'cv'k'kf cf "f gn'ecr kcn' t'cup'cek'p'crgu' q'p'f g'ug'p'ew'gp't'cp'rcu'f k'k'g'pek'cu'gp'v'g' r c'f'gu' *M'q't'p'd'rij w. '4235=Uj cknj . '4238+0"

gtcp"kpwtwo gpvqu"ko r qtvcvqu"fn'ko r gtlcrkuo q"geqp»o leq"r etc"cuji wtct"gn'owo kpkwtq"fg" o cvgtku'r tko cu'dctvcu"{'o gtecf qu'r etc'rc'r tqf week»p'f g'rcu'pcekqpgu'kpf wwtkrcgu"»Ectf quq"{" Hcrgwq."3; 8; =I wpf gt"Hicpm"3; 96+0F g'hqto c'uko krcr."rc"Vgqt"fc"gn'Ukugo c/O wpf q"uquvgr"fc" s wg'mqu'ecr krcgu'vcupcekqpcrgu'f g'mqu'egpvtqu'f g'cewo wrcck»p'f gvgto kpcp"Guxcf qu'hwgtvqu"gp" f lej qu'egpvtqu'r etc'i ctepvk ct'r tkxkrgi kqu'f g'ecr krcgu'o qpqr »rlequ"{'rko kct'c'rc'ercug'qdtgtc." c'rc'xgl 's wg'r kf gp'r qt"Guxcf qu'f²dkrgu"gp'mqu'r c"jgu'r gthk?tlequ'r etc'r qf gt"i ctepvk ct'rc'rdtg" ektewrcck»p'f g'uwu'dkpggu"{"i cpcpekcu"{"cwo gpvct"gn'hwuq"fkgtgpekcn'f g'gzegf gpvg"c"rc"|" qpc" egpvtcn"»Co kp'gv'cn"3; : 4=Cttki j k'{'F teci gn"3; : 8=Y cmgtuvkq."4226+0'

" Rqt"hwgtc"fg" guxcu"o kcf cu"o a u"r qmctk cf cu"gzkrvg" wpc"i tcp"ecpvk cf"fg" vtdclqu" go r"fllequ's wg"c"vtx²u'f g'f kxgtucu"o gvqf qmji "cu"uquvgrgp"swg"mqu'ghgevqu"fg"rc"KGF"gp"mqu" r c"jgu'o gpqu'f gucttqmcf qu'f gr gpf gp'f g'pwo gtqucu'xctkcdrgu."vrcgu'eqo q<rc'ecrk cf"{'gn'pkxgn' f gn'ecr kcn'j wo cpq"fgn'r c"ju"tgegr vqt"»Dgpi qc"{"Ucpej gl /Tqdrgu."4225=NK"{"Nkw"4227= Uqmo qp."4233+."gn'f gucttqm"fgn'o gtecf q"hpcekgtq"»Crcrtq"gv'cn"4226=F wtj co ."4226+."rc" gzkrvgpek'fg'vxcv'qu'f g'rdtg"eqo gteq"» j cpi ."4223+."gn'vco c° q'fgn'o gtecf q"»Hctgm'gv'cn" 4226=Mwo ctk"{"Uj cto c."4239+."rc"eqo r ngo gpvctkcf cf"gpvgr"rc"lpxgtuk»p"meci"{"gzvcp'gtc" »Cm htcl'{'Cm uchk."4236+."rc'ecrk cf"fg'rcu'kpuvkekqpgu'f gn'r c"ju"tgegr vqt"»Dgxc'p'gv'cn"4226= Gtf qi cp"{"Wpxgt."4237+."rc'ecrk cf"fg'rc"lphc'gutwewtc"»Dkuy cu."4224=Xkic{cmwo ct"gv'cn" 4232+."gn'equv'fg'rc"o cpq"fg'qdtc"»Dki k'k'gv'cn"4234+."rcu'rg{gu'ko r qukkxcu"»Dkuy cu."4224+." gn'lugevqt"geqp»o leq'fg'rc'go r tguc'uwduf kctk"»Crcrtq."4225+."gpvgr"qvtcu"0'

Gp'f ghpkkxc."rc"rkgtcwtc"go r"fllec"cttqlc's wg'mqu'ko r cevqu'fg'rc"KGF"uqp"xctkcf qu."{" uw'o ci pkwf"{'uki pq'f gr gpf g'f g'wp'co r rkq'eqplwpv'f g'ekewpucpekcu"»Crcrtq"{'Ej ctnmq."4229= Drcmcm'{"I gtvgt."422; =Dmipi gp"{"Y cpi ."4226=Eaj gp."4229=Hctqrg"{"Y kpmgt."4237= J cxtcpm'{'Kuqxc."4233=Nkr ug"{"Ulqj qm ."4227= 0Nkw"422: +0P q"uqtr tgp'fg'gpvqpegu's wg" mqu"pwo gtququ"guwf kqu"go r"fllequ"s wg"fguf g'j ceg"cn' wpcu"f²ecf cu"lpvgrvcp"cdqtf ct"guvqu" hgp»o gpqu'o wguvgt'guwncf qu'j gvtqi²pgqu"0Nc"o gvqf qmji "c"go r rncf c'r etc'tgcrk ct'f lej qu" guwf kqu."c'uw'xgl ."j c'kf q'xctkcp'q"cm'rc'rti q'fgn'vgo r q0Nc"xctkcdk'cf"gpvqvtcf c'vco dk'p" r wgf g'tghglct'tgcrgu'f kxgti gpekcu"gp'mqu'ko r cevqu'fg'rc"KGF."eqpf lekqpcrgu'c'rcu'ectcevt"jvlecu" f g'mqu'r c"jgu"tgegr vqtgu"{"rcu"gutcvgi kcu"{"cevkkf cf gu"mgxcf cu"cf gncpvgr"qt"mqu'lpxgtuqtgu" gzvcp'gtqu"»I cte"fc"{'N»r gl ."4242+0'

Gp"ewcpvq"cmqu'ko r cevqu'fg'rc"KGF"gp"gn'o cteq'fg'rcu'EI X."ug"gpvgrpf g's wg."gp"rc" o gf kf c"gp"s wg"rcu"GO u'ko r ngo gpvcp"gutcvgi kcu"oeqo r rglcu"o"fg"kvgi tcek»p"»r qt"glgo r m." f guepvtcrk cp"hwpekqpgu"gutcv'i lecu"{"tcf lecp"gp"uwu'hkrcrgu"cevkkf cf gu'fg"KF."f kug° q." mji "jvlec."gve0:"mqu'r c"jgu"tgegr vqtgu'r qf t"cp'dgpg'hekctug'fg'o c{qtgu'f gttco gu'r qukkxcu's wg" mqu's wg'tgek'cp"dclq'rcu'cpvgtkqtgu"o qf crk cf gu'fg'ko r rcvcek»p'fg'gug'vkr q'fg'ht'o cu"»I cte"fc"

{'N»r gl .4242-0Gu'f gek. 'cvtcgt 'hru'cevxkf cf gu'wlecf cu'gp'hcu't wpcuf g'rc'ewxc'f g'rc'öuqptkucö"
f g'rcu'ecf gpcu'f g'xcmt0"

Nqu'cpcrkuc'u'o ^a u'qr vko kuc'u'uwgrgp'f gucect'hqu'ko r cevu'r qukkxqu'eqo q'tguwncf q'f g'
rc''htci o gpvce»p'i mdcn'f g'rc''r tqf week»p"gp"EI X0'Rqt" glgo r m." Dcrf y kp"*4238+"uqukpgp"
r gtur gevxcu'r tqo kuqtku'r ctc" mqu" r c'fjugu' gp" f gucttqmj" { "uw" kpugtek»p" gp" ecf gpcu." { "j c"
r tqerco cf q'gnleqo kgp| q'f g'wpc'öi tcp'eqpxgti gpekö0Ugi Àp'guc'xkuk»p. 'hqu'r c'fjugu' { c'pq'vkgpgp"
s wg'f gucttqmt" kpf wutku' gpvgtcu" q" wpc" dcug" kpf wutku'r tqhwpc" cpvgu' f g' r ctvlekr ct" gp" gn'
eqo gtekq" o wpf ken" r qts wg'rcu'EI X" rgu'f cp"rc"qr qtwpkf cf "f g'xlpewctug" c"rc"r tqf week»p"
o wpf kcn'cn'gur gekrk| ctug'gp'cevxkf cf gu'f g'plej q0Cu'f'ug'uqukpgp's wg'mqu'r c'fjugu'cj qtc'r wgf gp"
r ctvlekr ct'gp'gZR qtvekpqgu'cxcp| cf cu'f g'o cpwcewcu'eqp'wp'ecr kcn'kpekcn'ko kcf q' { "qdvpgt"
ceeguq" c"vgepqm| f'f g'r wpc" { "eqpqeko kgpvu'f g'r tqf week»p0Gp" guc'f kgeek»p. "Nkp" { "O qpi c"
*4239<3: 8/3; 4+"f gucttqmp" guv"cti wo gpvq"gp"uw'rdtq"uqdtg"e»o q"mqu'r c'fjugu'gp" f gucttqmj"
r wgf gp"eqpxgti gt" g'kpf wutku'rk| ctug0Nqu'cwqtgu'xgp"wp"gpqto g'r qvpekn'gp"gnj' gejq" f g's wg"
mqu'r c'fjugu'gp" f gucttqmj" r wgf cp'xlpewctug" c'rcu'EI X'gur gekrk| ^a pf qug'gp'cevxkf cf gu'f g'plej q"
s wg'gu^a p"gp"rfjgc'eqp'uw'xgpvle"eqo r ctcvxk'tgrvxc0'

" Cni wpcu' qvtcu' eqpvtkvekpqgu' uqp" o ^a u' ecwgrmucu' ewcpf q" ug" vtcw" f g' gxcnct" rcu'
qr qtwpkf cf gu'f g'catch-up"gp"wp"o wpf q'f g'EI X0'Mcr nkpun { "*4227+" { "Ngg"*423; +tgeqpqegp"
s wg'rc'ewguk»p'pq'gu'uk'mqu'r c'fjugu'gp" f gucttqmj" f gdgp'xlpewctug" c'rc"r tqf week»p"o wpf kcn'ukpq"
e»o q'mj' cegp0Mcr nkpun { "qdugtxc'wp"gzeguq'f g'ecr cekf cf "i mdcn'gp'ecr cekf cf gu'r tqf wevxcu"
{ "o cpq'f g'qdtc"dtcvc" { .r qt'mj'vcpvq. 'cf xkgtvg'eqo q'wpc'öhc'cekö'uk'ö wej qu'r c'fjugu. 'cn'ö kuo q"
vgo r q. " kpvpgvp" f gucttqmtug" c" vtcx²u" f g" wpc" gutcvgi kc" f g" etgelo kgpvq" qtkgpvcf c" c" rc"
gZR qtvekp»p"Mcrc'nkpun { .4237<44; /453+0E qpenw { g's wg'mqu'r c'fjugu'pq'uqmj" f gdgp'kpugtvtug"gp"
rcu'EI X. 'ukpq's wg'f gdgp'j' cegtmj" f g'o cpgtc'gutcv²i kcc" { "ugrgevxc'r ctc'ecr wtct'rcu'tgpvcu'f g"
rc"gzr qtvekp»p"Mcrc'nkpun { .4237<464/46; +0Ngg"*423; +r qugg'wp"cti wo gpvq'uko krc" { "ceqpuglc"
vcpvq" c'rcu'go r tgucu'eqo q" c"mqu'r c'fjugu's wg'ug'kpugtvgp" { "f gukpugtvgp"gutcv²i keco gpvg"gp"rcu"
EI X'r ctc'mj' tct"upgrading0"

" Cf go ^a u. " guc" f kuewuk»p" r wgf g' xctkct" uki pkkcvcxco gpvg" f gr gpf kgpf q" f gn' vkr q" f g"
ecf gpc0Ncu'EI X'f kkgtp'eqp'tgur gevq" c"e»o q"rcu'go r tgucu'rfjgtgu'i qdkgtpcp"rc"ecf gpc" f g"
xcmt" { "e»o q"ug'f kwtkw { g'gn'r qf gt"gp"gm. "cu'f'vco dl²p" c"e»o q"rcu'cevxkf cf gu'f g'r tqf week»p"
ug'f kur gtucp'gp'vqf q'gn'ö wpf q. 'e»o q'ug'vqo cp'hcu'f gekukppgu'f g'wleceek»p. " { "e»o q'guvq'chgevc"
rcu'r gtur gevxcu'f g'kpvtxgpek»p'r qrf'kcc'mqecn'rcu'qr qtwpkf cf gu'r ctc's wg'rcu'go r tgucu'mqecrgu"
r ctvlekr gp. " { "rc"r qudkrkf cf "f g's wg'mqu'r c'fjugu'ecr vgp"tgpcu'f g"rc"gzr qtvekp»p. "cu'f'eqo q"rc"
r qudkrkf cf "f g" etgct" x'f'pewmqu"j' cekc" cv^a u' *backward linkages+" { "j' cekc" cf gncpvg" *forward
linkages+"gp"uwu'geqpqo f'cu'pcekqpcrgu"*Y j kkgf "gv'cn0"4243+0Cn'tgur gevq. "Cpf tgqpk"*423; <

494+"gphr~~kl~~ c's w~~g~~'r'etgcel~~ep~~"{'r~~u~~'qr qt w~~pk~~ cf gu'f g'ecr wt c'f g'xcmqt 'ug'f k~~ut~~k~~w~~ gp'f g'o cp~~gtc~~" f k~~ht~~gp~~v~~g'gp'r~~u~~'ecf g~~pc~~u'f g'xcmqt 'ugev~~tk~~rgu~~o~~'⁶⁶

" Cu'f'gp'gr'ugev~~qt~~'cwqo q~~tk~~ 'gz~~kug~~'o c {qt 'eqpugpuq'cegtec'f g'm~~u~~'ko r ce~~vu~~'r qu~~k~~ku'f g' r'KG'gp'v~~to~~ k~~pu~~l'f g'etgcel~~ep~~'f g'go r ngq'f 'ecr celk cf 'f g'r tqf week~~ep~~.f gtq'j c { 'b c {qt 'f k~~ue~~w~~uk~~ep" cegtec'f g'r'vtcp~~u~~htg~~pek~~'f g'v~~ge~~p~~q~~mi 'f'{"know-how, r'm~~q~~ecr~~k~~ cel~~ep~~'f g'r ct~~vgu~~'{ 'r k~~l~~ cu'f { 'm~~u~~' gh~~ge~~vu'gp'gr'eqo g~~tek~~q'gz~~vt~~k~~qt~~ 'f g'm~~u~~'r c'f'gu't~~ge~~gr vt~~gu~~'*Rctf k'423; =Rcx~~if~~pgm'4226=Rcx~~if~~pgn' { 'fi'f'cmx^a .4238=Y w~~wng~~.4243+0E~~qo~~ q' r ct~~vg~~'f g'm~~u~~'h~~ce~~vt~~gu~~'f g'm~~q~~ecr~~k~~ cel~~ep~~'{ 'f g~~ugo~~ r g^o q'f g' gu~~v~~ 'k~~pf~~ w~~ut~~k'ug'gp~~w~~gp~~vt~~c'gp'w~~p~~'h~~wi~~ ct 't~~gr~~x~~cp~~v~~g~~'r'gz~~kug~~pek'f g'ge~~qp~~qo 'f'cu'f g'g~~ue~~cr:0G~~u~~q'ug' f gdg'c's w~~g~~'r' tco c' cwqo q~~tk~~ " gu' w~~pc~~ " k~~pf~~ w~~ut~~k' k~~pv~~pk~~c~~ " gp' ecr k~~cn~~'s w~~g~~' gu^a " ko r w~~uc~~ c' r t~~gf~~ qo k~~pc~~p~~vg~~o gp~~v~~r qt 'ge~~qp~~qo 'f'cu'f g'g~~ue~~cr:0R~~qt~~'gl~~go~~ r m~~g~~.g~~u~~cu'lu~~pp~~'gr'h~~ce~~vt'ere~~x~~g's w~~g~~'k~~ph~~w'f g' gp'r~~u~~'f g~~ek~~uk~~q~~pp~~gu~~'f g'r~~u~~'go r t~~g~~u~~cu~~'m~~ff~~ gt~~gu~~'gp'v~~qt~~p~~q~~'c'r'm~~q~~ecr~~k~~ cel~~ep~~'f gr~~if~~ k~~ug~~° q'f { 'r'm~~q~~ecr~~k~~ cel~~ep~~' f gr~~ic~~dc~~u~~ve~~ko~~ k~~pv~~q0E~~w~~cp~~f~~ q'j c { 'w~~p~~'o g~~tec~~f q'm~~q~~ecr'iq'uw~~h~~ek~~gp~~v~~go~~ gp~~v~~'i t~~cp~~f g'r c~~tc~~'o qf gr~~u~~'f g' x~~gj~~ 'f~~w~~ru'f k~~ug~~° cf qu'm~~q~~ecm gp~~v~~'q'cf cr w~~f~~ qu'm~~q~~ecm gp~~v~~.r~~u~~'v~~gt~~o k~~pc~~rgu'gu~~ct~~° p'f k~~ur~~ w~~g~~u~~cu~~'c' go r t~~gp~~f gt 'r~~u~~'k~~px~~gt~~uk~~pp~~gu~~'uki p~~h~~lec~~v~~x~~cu~~'{ 'v~~qo~~ ct 'm~~u~~'t~~kg~~ui qu'cu~~q~~ek~~f~~ qu'eq~~p~~'r'm~~q~~ecr~~k~~ cel~~ep~~'f gr~~if~~ k~~ug~~° q'°*F~~qo~~ c un~~k~~'{ 'I y qu~~f~~ | .422; +0

" Ncu'ge~~qp~~qo 'f'cu'f g'g~~ue~~cr'v~~co~~ d~~k~~° p'lu~~pp~~'gr'it~~l~~pek~~r~~ cn'lo r w~~u~~qt 'f g'r'lw~~u~~h~~le~~ce~~ep~~'c'h~~x~~qt'q' gp' eq~~p~~vt c'f g' r' r tqf week~~ep~~ m~~q~~ecr'f g' eqo r q~~pp~~g~~v~~gu' N~~qu~~'h~~cd~~t~~l~~ec~~p~~v~~gu~~'f g' eqo r q~~pp~~g~~v~~gu' u~~q~~m' k~~px~~gt~~vt~~° p'gp'r'c' s w~~kp~~ct~~k~~'{ 'j g~~tt~~co k~~pv~~cu't~~gs~~ w~~gt~~k~~f~~ cu'uk'm~~u~~'x~~qn~~° g~~pv~~gu'f g'r tqf week~~ep~~ u~~q~~p' uw~~h~~ek~~gp~~v~~gu~~'r c~~tc~~'r ci c~~tm~~ *J cu~~ur~~gt.4233-654+0G~~u~~q'cr n~~ec~~'v~~cp~~v'c'm~~u~~'r t~~qx~~ggf q~~t~~gu'f g'go r t~~g~~u~~cu~~' o w~~kp~~cek~~q~~pc~~rgu~~'eqo q'c' r~~u~~'go r t~~g~~u~~cu~~'m~~q~~ecr~~gu~~' N~~qu~~'r t~~qx~~ggf q~~t~~gu'f g' o w~~kp~~cek~~q~~pc~~rgu~~' v~~kp~~gp' o w~~ej~~ cu'k~~pu~~vc~~re~~k~~q~~pp~~gu~~'gp'v~~q~~f q'gr~~ib~~ w~~pf~~ q. 'r qt 'm~~q~~'v~~cp~~v. 'w~~pc~~'p~~w~~g~~x~~c'k~~pu~~vc~~re~~k~~ep~~'gp'q~~vt~~q' r c'f'u'uk~~go~~ r t~~g~~' u~~ki~~ p~~h~~lec' k~~px~~gt~~uk~~ep' gp' p~~w~~g~~cu~~' j g~~tt~~co k~~pv~~cu' *U~~wi~~ k~~f~~ co c' { " H~~w~~ko q~~v~~.4222-3: 2+0' UK' gu~~v~~ p' f k~~ur~~ w~~g~~u~~cu~~'c'go r t~~gp~~f gt 'gu~~v~~'k~~px~~gt~~uk~~ep'f gr g~~pf~~ g'r t~~l~~pek~~r~~ cm gp~~v~~'f g'm~~u~~'x~~qn~~° g~~pv~~gu'f g'r tqf week~~ep~~ m~~q~~ecr'gur g~~tc~~f qu'N~~qu~~'h~~cd~~t~~l~~ec~~p~~v~~gu~~'f g' eqo r q~~pp~~g~~v~~gu'f g'r t~~qr~~ k~~gf~~ cf "m~~q~~ecr'u~~w~~gr~~gp~~" gu~~ct~~° eq~~ph~~k~~pc~~f qu' p~~cek~~q~~pc~~m gp~~v~~. 'm~~q~~'s w~~g~~'u~~ki~~ p~~h~~lec's w~~g~~'ug'f k~~ki~~ gp'À~~ple~~co gp~~v~~'c'r'k~~pf~~ w~~ut~~k'p~~cek~~q~~pc~~n'cn'io gp~~qu~~'cn' r t~~l~~pek~~r~~ k~~q~~0V~~kp~~gp's w~~g~~'eqo r g~~vt~~'eq~~p~~vt c'r~~u~~'b w~~kp~~cek~~q~~pc~~rgu~~'s w~~g~~'u~~q~~p'eqo r g~~vk~~ku'c'p~~k~~x~~gr~~ib w~~pf~~ k~~cn~~' { 'r w~~gf~~ gp'i g~~pg~~t~~ct~~'ge~~qp~~qo 'f'cu'f g'g~~ue~~cr:c'v~~tc~~x² u'f g'r' r tqf week~~ep~~'r c~~tc~~'f k~~ht~~gp~~v~~gu'o g~~tec~~f qu'0N~~c~~' À~~ple~~c'hw~~gp~~v'f g'ge~~qp~~qo 'f'cu'f g'g~~ue~~cr'f g'r~~u~~'go r t~~g~~u~~cu~~'m~~q~~ecr~~gu~~'u~~w~~gr'ugt' r' r tqf week~~ep~~'p~~cek~~q~~pc~~n' f g'x~~gj~~ 'f~~w~~ru'f { "eqo r q~~pp~~g~~v~~gu." { "uw'ecr celk cf 'r c~~tc~~'k~~px~~gt~~vt~~ gp'v~~ge~~p~~q~~mi 'f'{"gs w~~kr~~ q'f gr g~~pf~~ g'f g'

⁶⁶F g'v~~q~~f qu'o qf qu.'gp'r'ecf g~~pc~~'cwqo q~~tk~~ . "pq'lo r q~~tc~~'v~~cp~~v'f »p~~f~~ g'ug'r tqf w~~ep~~'m~~u~~'d~~l~~ep~~gu~~'q'ug'r t~~g~~u~~v~~gp'm~~u~~' u~~gt~~x~~le~~ku'f g'r~~u~~'GO . 'r' b' c~~ph~~g~~uc~~el~~ep~~'o ° u'lo r q~~tc~~v~~pv~~'f g'r'p~~cek~~q~~pc~~r~~k~~ cf "go r t~~g~~u~~ct~~kn'uki w~~g~~'u~~kp~~f q' r'm~~q~~ecr~~k~~ cel~~ep~~' f g'uw'ug'f g'eg~~p~~vt~~cn~~0N~~c~~'o w~~kp~~q~~ecr~~k cel~~ep~~'f g'r~~u~~'vt~~cp~~cek~~q~~pc~~rgu~~'uki w~~g~~'lo r w~~uc~~pf q'uw'uk~~f~~ g~~l~~ {"f k~~x~~gt~~uk~~h~~le~~ce~~ep~~. "eq~~p~~' o g~~pt~~ 'gzr' q~~ue~~k~~ep~~'cn'it~~kg~~ui q. {"et~~g~~cp~~f~~ q'go r ngq'f g'ecr~~k~~ cf . 'h~~qo~~ gp~~w~~pf q'r'k~~px~~gt~~uk~~ep'gp'k~~px~~g~~u~~ki cel~~ep~~'{ 'i g~~pg~~t~~cp~~f q' gr'gh~~ge~~vq'õ~~t~~ce~~v~~q~~t~~'s w~~g~~'t~~g~~cr~~k~~ cp'ud~~t~~g'q~~tc~~u'go r t~~g~~u~~cu~~'f g'o g~~pt~~'v~~co~~ c° q'gp'uw'ge~~qp~~qo 'f'cu'f g'q~~tk~~ gp'*CPHCE'{" UGTPCWWQ.4239+0

gmq0Guvu"geppqo ¶cu"fg"guern"r wgf gp"guvt"fcf cu"r qt"r"fgo cpf c"fgn'o gtecf q"mecn" { lq" gz vcp lgtq⁶⁷"

" Cf go ^a u."qtc'tcl »p'f'g'lo r qvcpk's wgr'hwgtcwtc'f gucec'r ctc'eqo r tgp'gt'griko r cevq" s wgr"r"lpxgtuk»p"gz vcp lgtc"cwqo qvtk "r wgf g"vpgt"gp"mqu"r c¶gu"r gth'lequ"gu"uw'r qm¶ec" kpf wutkcn'Nc"kp'wutk"cwqo qvtk "gu"wpq'f'g"mqu"glgo r mqu"o ^a u'f gucecf qu'f'g'r"pgeguk cf "f'g" wpc'r qm¶ec"kp'wutkcn' { c's wgr'gn' qdktpq"mecn'vkgp'g's wgr'pgi qekt"eqp"rcu'vgo kpcrgu"gpvcpgu" { "mqu"lpgtgugu"pq"ukgo r tg"guv⁸ p'r gthgevo gpv"cnkpgcf qu⁶⁸"Eqo q'r ctv'f'g"rcu'ectcevt¶mecu" o ^a u'ko r qvcpv'f'g"guv"r qm¶ec"kp'wutkcn'ug"gpewpvtc"gn'r qf gt'f'g"pgi qekce»p" **bergaining power+* "f'gn'Guvf q"r ctc"r qf gt'pgi qekt lf luek r pct" c"rcu"go r tgucu"o wnkpcckpvcrgu" **Dctpgu" gv'cn'4243=Drnem'gv'cn'4242=P cwwf c."422; =P cwwf c" { "Vj qdwt p."4236-0' Cni wpqu"fg"mqu" hcvqtgu"guv⁸ veku"o ^a u'ko r qvcpv's wgr'uq'hwgpv'f'gn'r qf gt'f'g'pgi qekce»p" f'gn'Guvf q"eqp"rcu" vgo kpcrgu"cwqo qvtlegu"uq'gn'vo c^o q'f'gn'o gtecf q'kpvtpq'f'gn'r c¶u" { "rcu"geppqo ¶cu"fg"guern" s wgr' wgf cp"crecp| ctug"gp"gn'o kuo q" **Nkw' { "F lengp."4228=Y wwg."4243-0⁹**

" F gptq'f'g"rcu"xctkcf cu"qr ekppgu"fg"r qm¶ec"kp'wutkcn'ug"gpewpvtcp"mqu"m¶o kgu"fg" r tqr kgf cf " { "mqu"tgs wukqu"fg"rcu"go r tgucu"cuqekvxcu" **joint-ventures.* "LX+." gucu"uq'wpc" j gttco kpv"ko r qvcpv"r ctc"qdri ct" c"mqu"lpxgtuqtgu"o wnkpcckpvcrgu" c"eqo r tqo gvtug"eqp" r tqxggf qtgu"fg"r tqr kgf cf "mecn" **Mwo* ctcuy co { "gv'cn'4234<598-0' "Rqt"qvtq'rcf q."rcu'r qm¶ecu" f'g"r tqwee»p" f'g"rcu"ko r qvckppgu" { "mqu"tgs wtko kpvqu"fg"eqpvk q"mecn" **EN+* "j cp"ukf q" r tgf qo kpcv'gp" vqf qu"mqu"r c¶gu"gp"gn'r cuvf q'0'Qvtc" ^a tgc"erxg"r ctc"rc" kpvtxgpe»p" f'gn' i qdktpq'gu'rc'ewguk»p'f'g'r' tcekpck cek»p'f'gn'o qf gmq0Ncu'vgo kpcrgu'vkgp'gur gekhceekppgu" f'kukpvcu"r ctc"uwu"eqo r qppgvu."m" s wgr'gxkc" s wgr'mu"hcdtkecpv'f'g"eqo r qppgvu"i gpgtgp"

⁶⁷"Ncu"geppqo ¶cu"fg"guern"uq'vcp"ko r qvcpv'gp"guv"ugevt"cn'r wpv" s wgr'rc"vdece»p" f'g"rc"r tqf week»p"o ^a u' i tcpf g"i gpgtcm gpv"uq'gp"i gpgtcn'co dk'p"mqu"r c¶gu"fg"fg' kug^o q'r ctc"wp"pwgq"o qf gmq'fg"xgj ¶ewm" { . "r qt"m" vcpvq."gn'p'kgn'f'g'eqpvk q"mecn'ugt^a "o ^a u'cnq"gp"guv"vdece»p0'Ncu'qvtcu'vdeceekppgu." { "gur gekcm gpv'cs wgr'cu" eqp"mqu"xqno gpqu'fg"r tqf week»p"o ^a u'dclqu."i gpgtcm gpv"uq'qdv'p'p"uwu"eqo r qppgvu'fg"mqu"r tqxggf qtgu" o wnkpcckpvcrgu'vgt/3' s wgr'j cp"ukf q"gn' k' qu'r qt'rc"vdece»p" f'g"r tqf week»p"o ^a u' i tcpf g" **Y wwg."4243<54-0'*

⁶⁸"Gp'cwugpele'f'g' qm¶ec."rcu'vgo kpcrgu'r tghgtk¶cp'rcu"ko r qvckppgu" { *follow-sourcing* "gp"mwi ct'f'g'rc' tcek cek»p" **Mwo* ctcuy co { "gv'cn'4234<598-0'

⁶⁹"Nkw' { "F lengp" **4228<3453+* "gphv'k cp"gn'r qf gt'f'g"pgi qekce»p" s wgr'gn' i qdktpq"ej kq'r qug'c"cn'pgi qekt"eqp" vgo kpcrgu"cwqo qvtlegu."dcucf q"gp"gn'gpqto g"o gtecf q"ej kq." s wgr'ug"xg¶c"ecf c"xgl" o ^a u'eqo q'wp'f'g'vukp'f'g" o lpxgtuk»p"qdri cf cö"r ctc"rcu"vgo kpcrgu'0'Gri' qdktpq"ej kq'r wf q"j cegt"ewo r rkt"rcu'tgutleekppgu"fg"gpvcf c."rc" tcekpck cek»p'f'gn'o qf gmq."mqu"tgs wukqu"fg'eqpvk q"mecn" **EN+* { "rc"vcpuhgt gpek"fg"vgepqm' ¶c'f'gd'k q" c"guv" r qf gt'f'g"pgi qekce»p0'Nkw' { "F lengp"qdugtxcp" s wgr'gp"i gpgtcm'gn'Guvf q'vkgp'g"o ^a u'r qf gt'f'g"pgi qekce»p"ewc'p'q" r "KGF"vkgp'g'vutcv'gi kcu"market-seeking"gp"mwi ct'f'g" *efficient-seeking* 0'

⁶"Gz kngp"f'kgtgpv'go qf qu'f'g"eqo r tqo ku"gpv'g"mqu"r tqxggf qtgu"o wnkpcckpvcrgu" { "rcu"go r tgucu"mecn'0'Ncu" o wnkpcckpvcrgu'r wgf gp"eqpvt vk "u'wukf kctcu"mecn'fg"r tqr kgf cf "v'cn'r wgf gp"lpi tguet"go r tgucu"eqplwv'cu"fg" ecr kcn'eqp" go r tgucu"mecn." r wgf gp" xgp'gt'uw"vgepqm' ¶c" c"r tqxggf qtgu"mecn' { lq" r wgf gp"r ct'v'k ct" gp" eqrdtcekppgu"eqp" go r tgucu"pcekpvcrgu"gp"gs wkr qu"q" f'kug^o q'0'Rctc"mqu"eqo r qppgvu"et¶eku"eqp"vgepqm' ¶c" r cvgpvcf c."rcu" o wnkpcckpvcrgu" ugt^a p" gz vgo cf co gpv" ecwgr'qucu." r gtq" gp" qvtqu"eqo r qppgvu"rc" r qm¶ec" i vdgtpco gpv'v'ho gpv"gp"o c { qt"o gf kf c"rc"eqqr gtce»p"vgepqm'i lec"gpvtg"rcu"o wnkpcckpvcrgu" { "rcu"go r tgucu" mecn' **Y wwg."4243<4: +0'*

geqpqo "cu" f g" guerc" ewcpf q" vkgp" s wg" uwo kpkmtct" c" o wej cu" vgtō kpcngu" f kgt gpvgu" eqp" gur gekhecekppgu" f kpkvcu" O'Guq" ug'r wgf g" nqi tct" c" vtcx² u'f g" r" go kukp" tgvtkpi kf c" f g" rkegpeku" f g" kpxgtukp" { lq" tgs wkukqu" o "pko qu" f g" kpxgtukp" 0: "C" uw'xgl . "gz kvgp" qvtc" i tcp" ecpkf cf "f g" r qf kvcu" kpf wvktcngu" o gpqu" ōci tgvkxcu" eqo q" gz gpekppgu" ko r qukxku. " guvbo wvqu" c" rcu" gzt vtcekppgu. " hfgcu" f g" et² f kq" r tghgt gpekcngu. " tgf weekppgu" ct cpegmtkcu" r ctc" h'ko r qt vcekp" f g" dlkppgu" f g" ecr kcn'g" kpuwo qu' kpvgtō gf kqu. " kpegpvkqu" h'uecngu. " eqqr gtcekp" gp" K F . " gpvgt" qvtcu" " C" uw'xgl . " cf go ^a u'f g" guvcu" ectcevtg" kvcu" f g" plxgn' o guq/geqp» o kek. " qvtqu" h'cevtg" u" f gr gpf gp" f g" r" f kgt gpekekp" gvtc² i kek" gpvgt" go r tgucu" f gn' o kuo q" ugevqt' O' Cu" cri wvqu" vtdclqu" f kpkpi wgp" go r " kvc" { " cpcn' kveco gpv' wpc" xctkfg cf " f g' b' qf gnu' r tqf wvku. " gvtcvgi kcu" f g" i cpcpeku. " hqto cu" f g" xcmvtcekp" f g" r tqf wvqu. " o qf qu" f g" qti cpk cekp" f g" r" r tqf weekp" { " r ct vkek cekp" f gn' vtdclq" *Dq { gt { " Htg { uugpv. " 4224 = Ucrku" { " Uqtr gt. " 3; ; 5 + 0F kpkvqu" guwf kqu" kpur ktcf qu" gp" guqu" gphqs wgu" j cp' r gto kfk q" cxcpl ct " gp" r" ectcevtgk cekp" f g" r" u" gvtcvgi kcu" f g" r" u" GO u'cn' o qvtct" s wg' xctkcu" cts wkgewt cu" f g" r tqf wvqu" { " qti cpk cekppgu" r tqf wvku" r qf t' cp" eqgz kvtk" *Dq { gt " gv'cn' 03; ; : = Rctf k" 423; + 0'

Gp" guv" ugpvkf q. " qvtq" h'cevt" f g" ko r qt vpekc" r ctc" gpvgt" gt" gn' ko r cev" f g" r" kpxgtukp" cwqo qvtk " gu' h' grgeekp" f g" r" u" GO u'f g" f kug" q" h'ecnf g" b' qf gnu" f g" xgj " f wvqu" O' Guq" gu' tgrxcpvg" { c" s wg' ug" j" c" f qewo gvwf q" s wg' rqu" f kug" qu' h'ecngu" r quggp" o c { qt " eqpvkpf q" h'ecnf" *Kctuuq" { " Ckxuco . " 4227 + 0E wcpf q" r" u" vgtō kpcngu" eqpuxw { gp" egpvqu" h'ecngu" f g" f kug" q" g" kpi gpkgt " r ctc" f kug" ct " u' u' xgj " f wvqu" h'ecnf gpv. " h' u' h'cdtkecpv" f g" eqo r qpgpvu" vco dlk p' ugt^a p' b' ^a u' r tqr gvuqu" c" t gcrk ct " f kug" qu' h'ecngu. " { " u' u' i k^a p" i twr qu" f g" f kug" q" h'ecngu" *Dtcpf v' { " Xcp" Dkgugdtqgem" 4228 + 0²"

Gp" tguwo gp. " c' r ct vkt" f g" n' g' zr wguq" ug' r wgf g" uquvgt" s wg" o ^a u' cn' f g" r" u' o ktcf cu' o ^a u' r qmktk cf cu" uqdtg" rqu" ko r cevqu" f g" r" KGF " gp" r c' fugu" go gti gpvgu. " vkgp" f g" c" j cdgt" wp" o c { qt

6: "Ulp" guv" vr q" f g" kpvtxgpekppgu. " gn' tguwncf q" ugt^a " vp" o gtecf q" h'ci o gvwf q" ulp" u' h'ekpvgu" geqpqo " cu" f g" guerc" r ctc" cr q { ct " gn' cwo gvwf q" gn' eqpvkpf q" h'ecnf" *Dctpgu. " 4239 - 47 + 0'

72: "C" uw'xgl . " gp" v' to kpvu' f g" h'ecnf cekp" f g" r" r tqf weekp" f g" r ct vgu" { " r kgl cu' h' u' h'cevtg" u' cpvgt kgt qu' ug' xgp' chgevcf qu" r qt " gn' vr q" f g" r ct vq" eqo r qpgpv" gp" f kvevukp" 0' Rqt " glgo r nq. " vp" xgj " f wvq" f g" o qvt " eqpvc" f g" 32022" r kgl cu" f kgt gpvgu" s wg' r g' v' g' c" a" tgcuf g' xgj " f wvqu" o w' f kgt gpvgu" *xgt " Vcdm" 2/3' f gn' Cpgz q' Guvcf " kveq" + 0Wp" o c | q' f g" ecdngu" vkgp" r qeq' gp' eqo Ap' eqp' vp' h'kmt q' f g" o qvt' O' Gp' i gpgtcn' r' h'cdtkecekp" egtepc" c' wpc" r r' pvc" f g" gpucō dnc' g" f g" cwqo » xkrgu" gu' gur gekm gpv' xgpvc' lqu" r ctc" r tqf wvqu" eqo q' kpvtkgt gu. " r ct vgu" gvt wewt cngu" { " f g" ecttqegt " c. " vtcpuo kpkppgu. " glgu" f g" vtcpuo kkp. " ukvgo cu' f g" ecr h'ceekp. " xgpv' kcekp" { " cktg" ceqpf kekpcf q' 0' Nc" r tqzko kf cf " gu" o gpqu" ko r qt vpvgt" r ctc" r' grvgt » p' lec. " h' u' ukvgo cu' f g" eqpvtkn' gn' o qvt { " h' u' ukvgo cu' f g" cwf kq" { " vgrgo ^a v' lequ. " s wg" uq' tgrv' xco gpv' o gpqu" eqvququ" f g" v' curf ct " *Ur kpf gpf t gkgt " gv'cn' 0' 4237 + 0F g' guv' o qf q. " cri wvqu" eqo r qpgpvu" j cp' f go qvtcf q' ugt' o ^a u' h' ekrgu" f g' u' wvkwk' r ctc" go r tgucu" f g' r tqr kfg cf " h'ecnf O' Gp' i gpgtcn' guqu" eqo r qpgpvu" j cp' ukf q' e' j cr c. " h' w' p' f kekppgu. " h' q' lcu. " cu" f eqo q' eqo r qpgpvu" r' u' w' eqv' 0' Nqu' glgo r rqu' kpenw' gp' cps wgu' f g' i cuq' kpc. " h' v' e' gu" v' t' c' p' cu. " cmo kpk" { " qvtqu" vr qu" f g" t' wgf cu. " vr cu" f g" t' cf kcf q' tgu. " u' w' g' v' cf q' tgu. " gur glqu. " ekpwtppgu" f g" u' gi wtk cf " f g' r' v' t' q' u" { " v' cu' g' t' u" co q' t' v' i' w' cf q' t' u" { " x' k' f' t' k' 0' Rqt " q' t' q' " r' cf q. " rqu" eqo r qpgpvu" et " kvequ" r ctc" r" u' gi wtk cf " { " v' e' p' q' i' leco gpv' u' q' h' k' v' e' cf qu" s wg' t' s' w' g' t' gp" r tqr kfg cf " k' p' v' g' e' w' c' n' i' g' p' g' t' c' m' g' p' v' r' g' t' o' c' p' e' g' p' gp" o' c' p' q' u' f' g' r' u' u' q' e' k' u' f' g' r' e' c' f' g' p' c' f' g' u' o' k' p' k' m' t' q' i' m' d' e' n' f' g' r' u' v' g' t' o' k' p' c' n' u' . " h' u' o' gi c' r' t' q' x' g' g' f' q' t' g' u' f' g' r' u' i' g' e' q' p' q' o' " cu" c' x' c' p' l' c' f' cu' O' Guvqu' kpenw' gp. " r' q' t' glgo r nq. " eqo r qpgpvu" f g' o' qvt' gu. " v' t' c' p' u' o' k' k' p' p' g' u' { " ukvgo cu' f g' h' t' g' p' c' f' q' *J wo r j t' g' { " { " U' c' r' g' t' p' q. " 4222 = Mwo ctcuy co { " gv'cn' 0' 4234 + 0'

eqpugpuq"uqdtg"uwu"lo r cevu'r qukxqu"gp"o cvgtk"geqp»o lec" { "uqekc"cwps wg'eqp't guwncf qu" j gvtqi 2pggu" gp" r" ddkkqi tclfc" go r f"lec." nq" s wg" f kkwnc" rnu" i gpgtck ceklpgu" f g" guvqu" hgp»o gpqu0Gp" gug'ugpvk q."ug"j c'ug° cmf q"r"r ct vkwrtkf cf "f g"r"KGF "gp"gn'o cteq" f g"rnu"EI X" { ."cÀp"o a u"gur ge"heco gpvg."rnu"ectcevt"rnu"ecu's wg"2 uvc"vkgp"gp"r"ecf gpc"cwqo qvk 0Cu"ug" j cp"tgo ctecf q"mru'r tkpek crgu"rcevtgu"r ctc"cpck ct "gn"ko r cevq" f g"r"lpxgtuk»p"gz vcpigt"gp" r c"lgu"r gkkt tlequ" s wg"r"rkgtcwtc"gur gelck cf c"j cmc"gp"r"tco c"cwqo qvk 0'Guqu"ug"r wgf gp" ci twr ct"gp"ewctq"i tcpf gu'eqplwpvqu"gz kvgpek" f g"geqpqo "cu" f g"guccr."ectcevt"rnu"ecu"uqekrgu" { "geqp»o lecu" f gn"r c"u." r qn"lec" kpf wmtkn" f gn"r c"u"tgegr vqt" { "rnu"r tqr kcu" gmtcvi kcu" f g"rnu" vto kpcrgu" cwqo qvlegu"0' Gp" guv" vgu"ug" cdqpc" a " s wg"o kpvct"u"r ctc" r" gzr rkecek»p" f g"r" kpf wmtk"cwqo qvk "cti gpvpc"gp"uw"i gpgtck cf "guvqu"rcevtgu"vkgp"wp"r guq"ko r qvcpvg."gp" gn'ecu" f g"Vq{ qvc" Cti gpvpc"rnu"rcevtgu"o a u"tgrxcpvqu"hwgtpp"rnu"gmtcvi kcu"cf qr vcf cu"r qt"r" go r tguv."vcpv" c"pkgn"i mdcn"eqo q"tgi kpcnltqecr0"

1.5 - Antecedentes de estudios de EMs japonesas automotrices

Gn'guwf kq" f g"rnu"r ct vkwrtkf cf gu" f gn'ecr kcrkuo q"lcr qp2 u"ug"eqpegvct"r tkpek cm gpvg" nvgi q" f g"r"KKI O " f cf q"uw"gur gevewrt" f gugo r g° q"gp"guv"r gt"qf q0'Guvc"r gewlct"vc{ gevtkc" f kq"nvi ct" c"gzr rkecekppu"paxgf qucu"uqdtg"gn" f gucttqm"geqp»o leq"ecr kcrkuv."r tkpek cm gpvg" dcuf cu"gp"r"gz kvgpek" f g"wp"Guvc" q" f gucttqmkuv" { "uw"r qn"lec" kpf wmtkn" *Lqj puqp."3; : 4= Y j kg" { "Y cf g."3; : : + { "f g"rnu"cuqekcekppu"Guvc" q/go r tguclku" *Gxcpu."3; ; 8."3; ; 9c+0' C"uw" xgl ." f kq"uwvqv" c" r" rkgtcwtc" uqdtg" *variedades de capitalismo* s wg"ug" gph gpvdc" c" rnu" eqpegr ekppu" f g"j qo qi gpgkf cf " { "eqpxgti gpek" f g"r" rkgtcwtc" pgqer" ulec" *Dgti gt" { "F qtg." 3; ; 8=F qtg."3; ; ; =J cm" { "Uqumkg."4223+0'

Gp" ewcpv" c" rnu" guwf kqu" uqdtg" rnu" GO u" lcr qpvcu."uwu" r tko gtqu" tgi kmtqu"hwgtpp" r wdrkecf qu"gp"3; 98" *Vuwtwo k"3; 98= [quj kpq."3; 98+0' Gp" guvqu" vcdclqu."eqo q" rnu" go r tguv" lcr qpvcu" tgek2 p" eqo gpl cdc" c" kpvtpcekppck ctug."uwu" vgu"r tkpek crgu" uquvpp" s wg" guvcu" hto cu"ug"r ctgegt" c" rnu" qeekf gpvcrgu" nvgi q" f g" rni wpqu" c° qu0'Ukp" go deti q."t° r kf co gpvg" guv" xkuk»p" hwg" f guclcf c" uquvppkpf q" s wg" guvcu" eqo r c° "cu" vgp" c" ectcevt" rnu" ecu" f kkvpcu" c" rnu" s wg" gz kvt" c" gp" gug" o qo gpvq." rnu" ewcrgu" gtcp" f g" GGWW" { "Gwtqr c0' Guv" f gucl" gn'eqpqeko kpvq" f kur qpklrg" uqdtg" rnu" o qf grqu" f g" cf o kkvctcek»p" f g" i tcpf gu" qti cpk cekppu" *Q| cy c."3; 9; = Y guvpg{ ."3; ; ; =Y guvpg{ ."4223+03" ""

⁷³Rctc"r tqhwpf k ct'cegtc" f g"rnu"eco dkqu"gp"r" hqto c" f g" qti cpk cek»p" f g" rnu" GO u" lcr qpvcu" f guv" g"3; 92' eqpuwct" Y guvpg{ "3; ; ; =4242+0'

Gp'r ct vkwrt. 'wpc'ugtlg'f g'ectcevt f'wkecu'f kwpkxcu'uqdtg'r'u'GO u'lcr qpgucu'mro ctqp"
 re'cvpkel»p'f g'mqu'guwf kququ'f g'r'u'htc cu'vtcupcekqpcngu'Gp'r tko gt'ni ct'ug'r wgf g'o gpekqct"
 gn'f gucttqm'f g'r'u'htc cu'lcr qpgucu'gp'eqmdqtcek»p'eqp'gn'f qdkgtpq'lcr qp²u'{'gn'ko r wnu'g'wg"
 ²ug'ngu'f kq'F kO ci i kq.'4223=Lqj puqp.'3; : 4=Y guvg{.'4223+0Cf go ^a u.'ug'tgo cte»'gn'f gewkt"
 uk'ngo c'f g'eqpvtcek»p'f g'vtdclcf qtgu'gp'Lcr »p.'gn'ewnlwng'ugt'r ctc'qf c'rc'xkf c.'gp'eqpvtcug"
 eqp'ni's wg'uwegf g'gp'GGWW.'eqp'wp'o gtecf q'rdqtcn'o ^a u'ngzkdng'{'eco dkcpg'»Dki i ctv.'4223=
 F qtg.'4235=Y guvg{.'4223+0Qvtq'vgo c's wg'ug'f guce»'uqdtg'r'gur gekkelf cf 'f g'gucu'htc cu"
 hw'rc'htc cek»p'f g'oe'f'ewqu'f g'ecrk cf ö."gp'mu'ewcngu'mu'go r ngcf qu'awi gt'f'p'o glqtcu'f g"
 ecrk cf 'f g'mu'r tqf wequ'f vtcpvg'uw'vtdclq"gp'rc'r rcpv" *Y guvg{.'4223+0Vco dk²p'ug'j c"
 tgo ctecf q'rc'f kkwncf 'f g'mu'glgewkxqu'f g'r'u'GO u'lcr qpgucu'r ctc'qr gtct'gp'GGWW'f gdlf q'c"
 ru'f kgt gpeku'gpvtg'pqt vgo gtecpqu'{'lcr qpgugu'gp'rc'eqpegr ek»p'f g'rc'cf o kpkwtcek»p'»Vqnej"
 gv'cn'3; ; ; +0⁴'''

C"uw'xgl.'gp'ewcpv'c"ru'htc cu'kpf wutkrngu'ug'j c'f gucecf q'uw'qti cpk cek»p'gp"
 ci twr cekqpgu'f g'go r tgucu'j qtk qpvcngu'{'xgt vkcngu'»i twr qu'go r tguctkrngu'keiretsu⁷⁵»Cqnk'{"
 F qtg.'3; ; 6+0Qvtq'vgo c'f g'guwf kq'hw'rc'cnc'kpvgi tcek»p'xgt vkcni'f g'r'u'htcngu'eqp'rc'ecuc"
 o vtk 00^a u'cm'f'f g'rc'htc c'f g'gzr cpuk»p'j cek'gn'gzvgtkq'r'u'htcngu'f g'r'u'GO u'lcr qpgucu.'ug"
 j c'ug^o cmf q's wg'gu^a p'hwgtvgo gpvg'kpvgi tcf cu'c'rc'gutcvgi kc'egpvtcni'f g'rc'htc c'»Dgej ngt'{"
 Dkf.'3; ; ; =Eco r dgm'{'Dwtvq.'3; ; 6+0

Wp'vgo c'v'wcf q'gzvpuco gpvg'uqdtg'gucu'eqo r c^o f'cu'gu'rc'tgrcek»p'gpvtg'go r tgucu"
 enkpvg/r tqxggf qt' lcr qpgucu'Gp' i gpctcn' guv' rkytcwvc' j c' tgucncf q' guv' ectcevt f'wkec"
 f kwpkxc'f g'r'u'GO u'lcr qpgucu'gp'eqpvtcr qukek»p'c'ru'qekf gpvcngu'f gdlf q'c'rc'kpvgi tcek»p"
 xgt vkcni'f g'r'u'go r tgucu'pkr qpcu's wg'f gucttqm'p'x'pewnu'o ^a u'hwgtvgo'gp'rc'ecf gpc'»I gtrcej."
 3; ; 4=J cengw'{'Utkpxcup.'3; ; ; +0F qtg'»3; ; 5+f ghp'»gug'x'pewnu'eqo q'wp'oeqpv'cvq"
 tgrcekqpcni'gp'eqpvtcr qukek»p'eqp'rc'tgrcek»p'f g'r'ngpc'eqo r gvgepk'»arm's length+f gn'ukugo c"
 f g'GGWW'Ugi Ap'gug'cwqt.'gp'Lcr »p'gzkug'wp'ugpvk'q'r ct vkwrt'f g'qdri cek»p'eqp'gn'uqekq"
 eqo gtekn'{'rc'eqo r gvgepk'o ^a u'r ngpc'ug'xg'gp'gn'o gtecf q'f g'mu'dkpgu'hpvcngu.'o kpvvtcu's wg"
 cni'kpvgtkq'f g'ru'ecf gpcu'f g'r tqf wek»p'ru'kpvgtco dkqu'f g'dkpgu'kpvgo gf kqu'uwngp"
 tgrk'ctug'gp'o ctequ'f g'eqo r gvgepk'no kcf c'{"tgrcekqpgu'f wvcf gtcu'Cu'ru'go r tgucu"
 lcr qpgucu'r tghgtgp'eqo r tct'c'htc cu's wg'eqpdegp'{'eqp'ru's wg'r wgf gp'cpv'ekr ct'wpc'tgrcek»p"
 c'rc'q'r n'q'»Dki i ctv.'4223=J co kmp'{'Dki i ctv.'3; ; ; +0Gp'r ct vkwrt.'guqu'x'pewnu'hwgtqp"

⁷⁴Gp'r ct vkwrt.'ug'j c'tgo ctecf q's wg'ru'uwdk'f lctku'f g'r'u'GO u'uwngp'o cpvpgt'lcr qpgugu'gp'rc'cf o kpkwtcek»p"
 f g'gucu'htcngu'{'eqpvtcvt'r tqhgukqpcngu'ngcngu'r ctc'v'ctgcu'f g'o gpqt'tgur qpucdk'cf »Y j kng'{'gv'cn'4225+0'
 ⁷⁵Eqo q'ug'xgt^a "gp'f gvcng'gp'gn'Ecr f'wru'5."Vq'qvc'gu'wp'ertq'glgo r m'f g'guc'qti cpk cek»p'xgt vkcni'f g'r'u"
 go r tgucu'lcr qpgucu'»I gtrcej.'3; ; 4+0"

f guetkr vqu"eqo q"tgnekqpgu" c"rti q" r n| q" { "guvdrngu" eqp" qdrki cekqpgu" tge¶ t qecu" *Qttw" gv" crf0"
3; ; ; <78; +0

Ugi Äp" Qttw" gv" crf0" *3; ; ; <772+ "uqdtg" r" dcug" f" g" hmpf co gpvqu" uqekqewwt crgu" f" kirkp vku." r u" t gnekqpgu" l p v g t e q t r q t c v k x c u" g p" f" k h g t g p v g u" u q e k g f c f g u" u g" e q p u k f g t c p" g n t g u w n c f q" f" g" f" k i r k p v q u" r t l p e k r k q u" k p u k w e k q p c r g u" { . " r q t" " n q" v c p v q . " g z j k d g p" e c t c e v g t ¶ u k e c u" f" k h g t g p v g u" O C u ¶ " g u v q u" c w q t g u" f g u c e c p" r u" e c t c e v g t ¶ u k e c u" f" k i r k p v k x c u" f" g" r u" t g n e k q p g u" l p v g t g o r t g u c t k c r g u" g p" r c" g e q p q o ¶ c" l c r q p g u c . " w p c" g e q p q o ¶ c" e q p" e c t c e v g t ¶ u k e c u" g u t w e w t c r g u" f k x g t u c u" c" r u" q e e k f g p v c r g u" { " g u r g e k c m g p v g" c" r c" f" g" n q u" G u v c f q u" W p k f q u 0

Gp" ewcpvq" c" r c" k p f w u t k c" c w q o q v t k . " r c" o c { q t ¶ c" f" g" n q u" h c d t k e c p v g u" f" g" c w q o » x k r g u" l c r q p g u g u" w o d k p" i g p g t c t q p" r t q e g u q u" f" g" g z v g t p c r i k c e k p" f" g" c e v k x k f c f g u" c" r t q x g g f q t g u" f k x g t u q u" c" n q u" q e e k f g p v c r g u . " r g t q" v c o d k p" c r n e c p f q" w p" h w g t v g" e q p v q n u q d t g" g m q u" *J g k o . " 4 2 3 8 + 0 " U w t i g a p" { " q v t q u" * 4 2 2 ; < 4 3 + " u q u k g p p" s w g" r u" g o r t g u c u" l c r q p g u c u" n f f g t g u" g p" r c" k p f w u t k c" c w q o q v t k " i g p g t c m g p v g" r g t u k i w g p" w p" g p h q s w g" f" k h g t g p v g" c" r c" c i t g u k x k f c f " { " r q e q" e q q r g t c v k x c" t g n e k p" e q o g t e k r n' s w g" g u v d r g e g p" r u" h k t o c u" f" g" G G W W 0 N q u" c w q t g u" u q u k g p p" s w g . " u k' d k g p" g n' e q / f k u g ° q" e q p" n q u" r t q x g g f q t g u" j" c" u k f q" i k o k c f q" g p" u w" c r e c p e g . " r u" g o r t g u c u" n f f g t g u" l c r q p g u c u" j c p" v g p f k f q" c" h q t o c t" t g n e k q p g u" e c w k x c u" r c v g t p c r i k u c u" c" r t i q" r n | q" e q p" n q u" r t q x g g f q t g u" O G p" o w e j c u" q e c u k q p g u" g u v q" j" c" l p x q n w e t c f q" r c | q u" f" g" g s w k f c f " g p v t g" n q u" h c d t k e c p v g u" f" g" c w q o » x k r g u" { " n q u" r t q x g g f q t g u . " n q u" e w c r g u" t g u r q p f g p" f" g f k e a p f q u g" c" u g t x k t" c" u w' o c { q t " e r k g p v g 0 C u ¶ " g n' e c o d k q" f" g" r t q x g g f q t " u k p" r t g x l q" c x l u q . " g z e n u k x c o g p v g" r c t c" q d v g p g t " w p c" i c p c p e k c" e q t v q" r n | q . " g u" e c u k' k p g z k u v g p v g" e q p" v g t o k p c r g u" l c r q p g u c u . " { " u g" r g t o k g" s w g" u g" f" g u c t t q m g p" t g n e k q p g u" d c u c f c u" g p" r c" e q p h k p | c" c" r t i q" r n | q" * C u c p w o c . " 3 ; ; ; = J g r r g t { " J g p f g t u q p . " 4 2 3 6 = V O L O U w t i g a p" g v" c r f 0 " 4 2 2 ; = V O L O U w t i g a p" { " D k g u g d t q g e m" 4 2 3 3 + 0 6 " C " u w" x g l . " v c o d k p" u g" j" c" u g ° c r e f q" s w g" r u" v g t o k p c r g u" l c r q p g u c u" f" g u c t t q m t q p" g u t c v g i k c u" f" g" f" g u n q e c r i k c e k p" c" r c" ¶ u g u" f" g" o g p q t g u" e q u v q u" o g p q u" c i t g u k x c u" s w g" r u" f" g" G G W W { " G w t q r c" * J g r r g t { " J g p f g t u q p . " 4 2 3 6 = V O L O U w t i g a p" { " D k g u g d t q g e m" 4 2 3 3 + 0 7 "

Cuko kuo q." nqu" r t q x g g f q t g u" f" g" n q u" h c d t k e c p v g u" f" g" c w q o » x k r g u" l c r q p g u g u" g t c p" u k i p k h e c v k x c o g p v g" o a u" r t q r g p u q u" c" l p x g t v t " g p" e c r c e k f c f g u" q t i c p k c v k x c u" e q o q" r c" h q t o c e k p" f" g" e c r k f c f " { " g n' o c p v g p k o k g p v q" f" g" w p" r t q f w e v q 0 N c u" g o r t g u c u" l c r q p g u c u" { " u w u" r t q x g g f q t g u"

⁷⁶"Cf go a u. "Uwti gqp" { "qvtqu" *422; + "cpcrki cp" r u' o c { qt gu' s w k g d t c u' f' g' r u' c w q r c t v k u c u' o a u' i t c p f g u' f' g n' o w p f q" g p" r t k o g t c" f 2 e c f c" f' g n' u k i n q" { " f g u c e c p" s w g" v q f c u" g m c u" r t q x l g p p" f" g" G G W W { " G w t q r c . " o k g p v c u" s w g" p k p i w p c" f" g" g u c u" g u' l c r q p g u c 0

⁷⁷"Qvtqu" guwf kqu" f gucecp" e» o q" r u' t g n e k q p g u" v g t o k p c r i' l c r q p g u c / r t q x g g f q t " g z v t c p l g t q" u q p" t g r n e c f c u" r q t " g u c u" o w n k p c e k q p c r g u" g p" G G W W * H q t k f c" { " M g p p g f { . " 3 ; ; 3 + 0 N q u" c w q t g u" j" c m p" s w g" r u" v g t o k p c r g u" l c r q p g u c u" t g r h e c t q p" g p" i t c p" o g f k f c" u w u' t g n e k q p g u" e q p" r t q x g g f q t g u" l c r q p g u g u" { " g u c f q w p k f g p u g u" t c f k e c f q u" g p" G G W W e q p" x ¶ p e w n q u" f" g" r t i q" r n | q . " c n q u" p k x g r g u" f" g" k p v g t c e e k p" { " t g u q n w e k p" f" g" r t q d r g o c u" g p" e q p l w p v q" f" g" h q t o c" u k o k r c t" c" e q o q" n q" t g c r i k c d c p" g p" l c r » p * H q t k f c" { " M g p p g f { . " 3 ; ; 3 < 5 ; 6 + 0

vo dl2p" kpxk vgtqp" gp" o gecpkuo qu" qti cpk cxxqu" f kug° cf qu" r ctc" cwo gpvct" gn' hmlq" f g" kphqto cek»p." nq" swg" uki pkk»" swg" ncu" r ctvgu" mgi ctqp" c" eqo r tgpf gt" r tqhwpf co gpvg" nqu" r tqf wevqu" { 'r tqeguqu' f g'ic" qvc0Gucur' tª evkcu'r tqo qxlgtqp"ic"o glqtc"eqp»pvc."r gto kkgpf q" c"nqu"r tqxggf qtgu"lcr qpgugu"tgf wekt "nqu"r tgekqu"ecf c" c° q" f wcpvg" f² ecf cu."ukp" f glct" f g" ugt" eqo r gvgpvu" { 'r gto kkgpf q" c"icu"eqo r c° ¶cu"cwqo qvtegu"lcr qpgucu"eqphkt"gp"r tqf wek"õlwuq" c"vko r qõ"gp"nmi ct" f g"o cpvpgt"wp" kpxgpvctkq"equvqu" *J gr gt" { "J gpf gtuqp."4236=Nkdgto cp" { 'F go gguvgt."3; ; ; +0

Cf goª u."qvtq"vgo c" f g"ko r qvcpck"r tqr kq" f g"ic" kpf wutk"cwqo qvkt "lcr qpguc"hwg"gn' *Lean Manufacturing System* *NO U±. Guv"ukuvgo c"guª "dcucf q"gp"gn'*Toyota Production System* *VRU" { 'ug"ghqec"gp"b kpk k ct"gnf gur gtf kekq" f gpvtq" f g"hu"ukuvgo cu" f g'ic"dtkecek»p" { .cn'ò kuo q" vgo r q."o czko k ct"ic"r tqf wevxxkf cf 0ªC"o gf kf c"s wg"nqu"r tqf wevqtgu" f g"cwqo »xkgu"lcr qpgugu" guvcdmgektp"qr gtcekqpgu" f g"o cpwicewtc"gp"nqu"Guvf qu"Wpkf qu" f wcpvg"ic" f² ecf c" f g"3; ; 2." qvtqu"ic"dtkecpvu" f g"cwqo »xkgu"go wrctqp" { "cf qr vctqp" tª r kf co gpvg"ic"u"r tª evkcu" f g'ic"u"htc" cu" pkr qpcu" *Uj ko qmxy c."422; +0Nwgi q."guv"ukuvgo c"ug"gzr cpf k»"c"qvtqu"ugevqtgu"r tqf wevxxqu" { "c" nq"ic"ti q" f gn'ò wpf q" *Lc { ctc"o "gv'cn0"4232+0Cewcm gpvg."nqu"r tkpek kqu"tgevqtgu" f gn'NO U" { "nqu" pwxqu"r tqeguqu" f g"i guk»p" f gtxcf qu" f g"2 n'uqp"r ctvg" kpvgi tcn' f g"ic"u"qr gtcekqpgu" f g"o Ankr nqu" cevxxkf cf gu" f g"r tqf wek»p" { "ugt xkekqu" *Ngg" { "Lq."4229+0

Gp"tguwo gp."gzkuvp"cdwfp cpvgu"cpvgegf gpvgu"s wg"ug° cnp"ic"u"r ctvewrctkf cf gu" f g"ic"u" GO u"lcr qpgucu"gp"ic" kpf wutk"cwqo qvkt . "nq"ewcn' f c"ewgpvc"s wg"pq"gu"r qukdrg"j qo qi gpqk ct" c" ic"u"go r tgucu" f g"wp"ugevqt0Gp"r ctvewrct."Vq { qvc" Cti gpvpc"hwg"ic"r tko gtc" kpxgtuk»p"lcr qpguc" gp"ic" kpf wutk"cwqo qvkt " f gn' r c¶ju."nq"ewcn'vppf tª "r guq"gp"ic"r ctvewrct" guctevgi kc"go r tguctken' f gur ngi cf c."r tkpek cm gpvg"eqp"nqu"r tqxggf qtgu"cwqr ctvuxcu0Gp"guv"ugpvkf q."gp"nqu"r t»zko qu" ecr ¶wru"ug"xgtª "e»o q" guc"ectcevt¶vlec"vkgpg"ko r qvcpck" c"ic"r"j qtc" f g"gpvppf gt"uw'ecf gpc" f g" xcinqt"vcpq" c" plxgn'kpvgt pcekqpcn'eqo q"ic"ecn0

Conclusiones parciales

Gp" guvg" ecr ¶wru"ug"j c" f gucttqmf q" gn'eco r q" f g" guwf kqu." gn' o cteq" v»tkeq" { "nqu" r tkpek cnqu"cpvgegf gpvgu"s wg" gpo ctecp"ic"r tguvg" kpxguki cek»p0Cu¶"ug"j c" f ghpkf q"s wg" gn' guwf kq"cf qr v"wp"o cteq" cpcn'¶keq"s wg"eqo dkpc" f qu"cdqtf clgu"v»tkequ" <gn'ghqs wg" f g" *cadena globales de valor* " *EI X+ { "ic"r gtur gevxc" f g"ic" *estrategia empresarial* f g"ic" uqekmqi ¶c" geqp»o kec0Nqu"cr qtvgu"oª u'tgrxcpvu" f gn'ghqs wg" f g" EI X"r ctc"ic" kpxguki cek»p"r tqr wguv"ug"

⁷⁸Gn'vgo c" f gn'VRU"ugtª "cdqtf cf q"gp"r tqhwpf kf cf "gp"gn'Ecr ¶wru"50'

dcucp"gp"rc"fcuetkr ek»p"vqcn'f g"rc"ecf gpc"fg"xcnqt"cwqo qvtk . "vpgkpf q"gp"ewgpc"fguf g"gn' f kug° q'j cuvc'gn'wau'kpcnif gn'r tqf wevq. 's wg'gp'gung'ecuq'buq'hqu'xgj ¶ewnu'r tqf wekf qu'r qt "Vq{ qvc" Cti gpvpc0Gnugi wpf q'grgo gpvq'f g'ko r qt vpekc'gu'gnitqnf g'rcu'ht'o cu'ff'gt'gu's wg'o qrf gcp'gucv' ecf gpcu.'s wg'gp'gung'ecuq'iq'gl'gteg"Vq{ qvc"Cti gpvpc"eqp'hqu'r tqxggf qt'gu'hqecngu{"gz'v'cpl'gt'qu." {"'eqp'rc'tgf'f'g'eqpegukq'pct'kqu{"'er'k'gp'v'gu'hqecngu{"'gz'v'cpl'gt'qu"0Rqt "Ànko q.'gung'cdqtf'clg'r'gt'o'kg" cpcrk'ct'è»o q'hqu'r tqxggf qt'gu'r wgf gp'q'p'q'gucnct'gp'rc"ecf gpc.'iq'èwcn'vco d'k'p'ugt' t'g'v'qo cf q' gp'gn'Ecr ¶wau'7"c'r'ct'vt'f'g'hqu'ecuq'f'g'rcu'r' t'k'p'ek'c'ngu'cwqr'ct'v'ku'cu'f'g'Vq{ qvc"Cti gpvpc0"

Ukp"go d'cti q.'vco d'k'p'ugt'j'c'k'p'vt'qf'wekf'q's'wg'gn'o'cte'q'v'g»t'leq'f'g'rcu'EI X'hwg'w'k'k'cf'q' o'c{qto'gp'v'c'p'k'x'gr'gu'f'g'ugev'qt'gu'geq'p»o'lequ{"'p'q'f'g'h'ko'cu'k'p'f'k'k'f'w'c'ngu'0Rqt'gung'o'q'v'k'q.'" cni w'p'qu'c'w'q't'gu'eqo'gp|ct'q'p'c'r'nc'p'v'g'ct'rc'ko'r'qt'v'p'ek'c'f'g'rcu'f'g'ek'uk'q'p'gu'f'g'ce'v'q't'gu'gur'ge'¶'lequ." t'go'ct'ec'p'f'q'rc'p'g'eg'uk'f'cf'f'g'h'g'x'ct'gung'cp' r'kuku'c'n'p'k'x'gn'f'g'rc'go'r't'guc'0Nc'r't'gug'p'v'g'k'p'x'g'uk'i'ce'k»p" r'tqr'q'p'g'eq'p'v'p'w'ct'rc'f'k'g'ee'k»p'r'tqr'w'g'uc'r'qt'U'cnu{"' \ {n'd'g't'd'g'ti "4237+'c'n'c'p'c'rk'ct'w'p'c'ec'f'g'p'c' f'g"xcnqt"c"r'ct'vt'f'g"wp'c"ht'o'c"k'p'f'k'k'f'w'cn"uk'p"go d'cti q.'"gm'ug"m'g'x'c't" c"ec'd'q"cf'qr'v'c'p'f'q' et'¶'leco'gp'v'g'gn'gz'co'gp'f'g'rcu'estrategias empresariales0Cu¶'rc'v'g'uk'u'cd'q'p'c'rc'k'f'g'c'f'g's'wg'rcu' ht'o'cu'u'q'p'ce'v'q't'gu'u'q'ek'c'ngu's'wg'g'u'v'p"l'p'h'w'k'f'qu'r'qt"o'À'nk'r'ngu'h'c'v'q't'gu."c'ng'l'p'f'q'ug"fg'rc" k'p'v't'r't'g'w'c'ek»p"fg'rc"ge'q'p'qo'¶'c"p'g'q'c'n'ulec"/t'g'v'qo'cf'c"gp"nu'gu'w'f'k'qu'f'gn' management" g' international business/"s'wg"rcu'gp'v'k'p'f'gp"eqo'q'ci'gp'v'gu'w'p'k'c't'k'qu"o'c'z'ko'k'cf'q't'gu"fg' k'p'h'q'to'ce'k»p"eqo'r'ng'c{"'t'c'ek'q'p'c'rk'cf'r'g't'h'g'v'c'0Rqt'gn'eq'p'v'c't'k'q."gp'g'uc'v'g'uk'u'ug'gz'co'k'p'c't" c'rc" h'k'c'n'f'g'wp'c"GO"l'p'v't'r't'g'v'p'f'q'rc"eqo'q'wp'c"q'ti'c'p'k'ce'k»p"eqo'r'ng'c"s'wg'g'u'v"do'ble'm'ente' incrustada'c'r'ct'vt'f'g'u'w'f'g'f'k'p'v't'p'c'ek'q'p'c'n{"'m'ec'n'0F'g'gung'o'q'f'q.'uk'd'k'ep'ug't'g'v'qo'ct'a'rc't'g'ek'ep'v'g" r'tqr'w'g'uc't'g'c'rk'cf'c'r'qt'c'w'q't'gu'f'g'rcu'EI X's'wg'u'w'i'k'g't'g'gn'c'p' r'kuku'f'g'g'uc'v'c'ec'f'g'p'c'u'c'p'k'x'gn'f'g' go'r't'guc."g'ug'ug"m'g'x'c't" c"ec'd'q'eq'p"wp"g'p'h'q's'wg'f'k'uk'p'v'q'f'g'rc"gu't'c'v'g'i'k'c"go'r't'g'uc't'k'c'r'0Cu¶'c" v'c'x'2'f'g'gung'g'p'h'q's'wg'v'g»t'leq'ug'd'w'ue'c'p'w'g'x'c'u'x'c't'k'c'd'ng'u'f'g'cp' r'kuku's'wg'p'q'g'u'v'p'r't'g'ug'p'v'g'gp" nu'gu'w'f'k'qu'f'gn' management" {"'ugt'p'f'g'ko'r'qt'v'p'ek'c"r'c'tc"gp'v'g'p'f'gt'rc"gz'eg'r'ek'q'p'c'rk'cf'f'g" Vq{ qvc{"'u'w'ec'f'g'p'c'f'g'xcnqt"gp'gn'o'g't'ec'f'q'c'ti'gp'v'p'q'0"

Rqt "Ànko q.'rc'k'p'x'g'uk'i'ce'k»p'c'r'q't'v'c't'a'p'w'g'x'c'g'x'k'f'g'p'ek'gp'rc'f'k'ue'w'uk»p'u'q'd't'g'nu'g'h'g'v'q'u' f'g'rc"KGF'f'g'GO'u'gp'r'c'¶'u'gu'gp'f'g'uc't't'q'm'q.'f'c'p'f'q'u'w'w'g'p'v'q"c'rc'x'k'uk»p"s'wg'u'q'v'k'g'p'g"s'wg'p'q'ug" r'w'g'f'g'g'uc'd'ng'eg't'w'p'c't'g'i'rc'i'g'p'g't'c'n'u'q'd't'g'f'le'j'qu'b'q'x'ko'k'g'p'v'q'u{"'c's'wg'g'ug'qu'ko'r'ce'v'q'u'f'g'r'g'p'f'gp" f'g'p'w'o'g't'q'uc'u'x'c't'k'c'd'ng'u'0G'p"m'q'eq'p'eg't'p'k'g'p'v'g"c'rc"KGF"gp"EI X"cw'q'o'q'v't'le'gu'ug'u'q'v'g'p'f't'a"rc" ko'r'qt'v'p'ek'c'f'g'm'q'c'p' r'kuku'c'p'k'x'gn'f'g'h'ko'c.'gp'v'g'p'f'k'g'p'f'q's'wg'rcu'o'ku'o'cu'p'q'u'q'p'j'q'o'q'i'2'p'g'c'u'0' Eqo'q'ug'k'a'f'g'uc't't'q'm'c'f'q'c'm'rc'ti'q'f'g'rc'v'g'uk'u.'r'c'tc'gn'f'ec'u'q'f'g'Vq{ qvc"Cti gpvpc."nu'h'c'v'q't'gu' f'g'v'g't'o'k'p'c'p'v'g'u'r'c'tc'gp'v'g'p'f'gt'uw'v'c{g'ev'q't'k'c't'g'ek'g'p'v'g'u'q'p'<u'w't'q'n'gp'rc'g'ut'w'ew't'c'o'w'w'k'p'c'ek'q'p'c'n" gn'v'k'q'f'g'x'g'j'¶'ew'nu'r't'q'f'we'k'f'q.'rc'g'ut'c'v'g'i'k'c'eq't'r'q't'c'v'k'c'f'g'Vq{ qvc.'h'w'g't'v'g'o'gp'v'g'k'p'h'w'g'p'ek'f'c'r'qt" rc'ew'w't'c'l'c'r'q'p'g'uc{"'rc'j'k'v'q't'k'c'f'g'rc'go'r't'guc{"'nu'eco'd'k'qu'gp'rc'i'g'uk»p'm'ec'n'c'r'ct'vt'f'g'gn'

42320

CAPÍTULO 2

La industria automotriz argentina luego de la crisis de la convertibilidad: la excepcionalidad de Toyota Argentina (2002-2019)

Introducción del capítulo

Gp"gn'r t gupvg"ecr ¶wru"ug"tgcrk c"wp"dtgxg"tgug° c"j kuxtkc"uqdtg"gn'f gucttqm q" f g"rc" kpf wutk"cwqo qvkl "gp"Cti gpvpc"kf gpvkecpf q"uwu"r tkpek crgu"r tqdrgo^a vkecu0Ug"eqo kgp| c" guc"t geqput week»p" f guf g'hqu'kpekqu" f g'rc"hdtkceke»p" f g'xgj ¶ewru"gp"gn'r c¶u"gp"3; 42. 'r cucpf q" r qt"uwu" f kwpvcu"gvcr cu<uw"eqo kgp| q" { "gzc cpuk»p" *3; 42/3; 97+ *2.1.1+."gn'hk" f g"rc"gvcr c"r qt" uwukwek»p" f g" ko r qtvekpqgu" { " gn' gucpeco kgpvq" f gn' ugevqt" *3; 98/3; ; ; + *2.1.2+ { " rc" tgeqphk wtceke»p" f g'rc" kpf wutk" c"r ctvt " f g'rcu'tghqto cu'gut wewtcrgu" { "rc" hqto ceke»p" f gn'o gtecf q" tgi kqpcn" *3; ; 2/4223+ *2.1.3+0Ug"cj qpf c"gp"rc"Àmo c" f g"guvcu"hcugu" { c" s wg"cm¶ug" f gur rkgi cp" eco dkqu"gut wewtcrgu"gp"gn'ugevqt" s wg" xcp" c"o ctect"uw" f gucttqm q"gp"gn'r gt¶qf q"uki wkgpvg" { "gu" ewcpf q"ug"kpucrc"Vq { qc"gp"Cti gpvpc."eqo gpl cpf q"eqp"uw'r tqf week»p"gp"3; ; 90"

" Nwgi q."ug"cpck c"gn'tgeqtkf q" f gn'ugevqt" c"rc"ucrk c" f g"rc"etkuku" f g"rc"eqpxgt vdkrk cf "c" r ctvt " f g" uw" f gugo r g° q" gp" vto kpqu" f g" r tqf week»p." xgpvcu." go r rñq." gzc qtvekpqgu." ko r qtvekpqgu" { "ucrf qu"eqo gtekrnu." f kgt gpekecpf q"rc"gvcr c" f g"rc"r queqpxgt vdkrk cf " *2.2.1+ { " gn'i qdkgtpq" f g"Eco dkgo qu" *2.2.2+0Gp"dcug" c" guvqu"t guwncf qu"ug"t gucnc"rc"r gtukvpeke" f g"qu" r tqdrgo cu'gut wewtcrgu" f gn'ugevqt"gp"gn'uki m"ZZK"

Rqt"Àmo q."gp"gn'uki wkgpvg"cr ctvcf q"ug"cpck c"gn'f gugo r g° q" f g'rcu" f kwpvcu"vgo kpcrgu" cwqo qvkegu" f wcpvg"gn'r gt¶qf q" dclq" guwf kq" c" txc² u" f g'uwu"pkxrgu" f g'r tqf week»p." hcewtceke»p." r quke»p" gp" rc" eÀr wrc" go r tguclc" cti gpvpc." go r rñq." xqno gp" { " f kxgtukhceke»p" f g" rcu" gzc qtvekpqgu."ucrf qu"eqo gtekrnu" { "eqpvkpf q"mecn" f g"qu" xgj ¶ewru" *2.3+0C"r ctvt " f g"guv" gzco gp"ug" f gucec"gn'ecuq" f g"Vq { qc"r qt"uwu"t guwncf qu"uw"r gkqtgu"gp"rc"o c { qt"r ctvg" f g"qu" cur gevqu"cpck cf qu"cn'eqo r ctctug"eqp"gn'tguvq" f g"rcu"vgo kpcrgu"cwqo qvkegu"0Gm"o ctec"rc" gzege ekqpcrk cf " f gn'ecuq" f g"guwf kq" { "rc"pgegukf cf " f g"gpvpgf gt"qu" hcevtgu" s wg" gzc rkecp" guv" f gucttqm0"

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2.1 - Breve reseña histórica de la trayectoria automotriz argentina desde sus inicios hasta la crisis de la convertibilidad

2.1.1 - Inicio y crecimiento de la producción automotriz argentina (1920-1975)

Gp"gnlc° q"3; 44"Hqtf "kpcwi wt»"re"r tko gtc"r rcpw"fg"cto cf q"fg"xgj ¶ewru"gp"Cti gpvkpc" *Dgnkpk"4228<332+."eqp"gn'qdlgkxq"fg"ucvkucxeg"re"fgo cpcf"fg"wp"r gswg° q"o gtecf q"kpvtppq" swg"ug"go r gl cdc"cf gucttqmet"gp"vqtpq"cf"re"ucvckkf cf gu"r tko ctq/gzr qtvcf qtcu"¶Uej xct| gt." 3; ; 8+0Eqp"re"etkuku"o wpf knif g"3; 52"ug"lplek"wp"rti q"r gt¶qf q"ectcevtk cf q"r qt"eqpvtqru"fg" ko r qtvcex"p"fg"xgj ¶ewru"{"gn'kpvq"fg"uwukwk"fej cu"ko r qtvcexppg"fg"o cpwxcwcu"r qt" dlkpgu"r tqf welf qu'hqecm gpv"¶Uqwtqwkng."3; ; 2+0Cu¶"hwgi q"fg"re"ugi wpc"i wgttc"o wpc kn"re"u" kphcpvu"go r tgucu"cwqr ctvkuc."guko wrcf cu"r qt"gnr gtqkuo q."r tqxg¶cp"eqp"r ctvuc"re"u"r rpvu" gpuc drcf qtcu"fg"xgj ¶ewru"¶P qhcn"3; ; -0"

" C"uw"xgl ."f wcpvg"guv"gvrc"eqo gp| »"re"r tqf week"p"fg"cwqo »xkru"{"wkrkctkq"r qt" r ctvg"fg"nleqpi nqo gtecf q"fg"go r tgucu"guv"vrgu"¶kf wutku"Cgtqpª wkecu"{"O geª pkecu"fg"gn'Guvcf q" *KCO G"ªs wg"ug"ghqe»"gp"re"r tqf week"p"fg"xgj ¶ewru"ªs wg"ko kcdcp"{"lq"cf cr vcdcp"fg"lug° qu" gzvtcplgtq."o wej cu"xgegu"o gfkcpvg"guhwt| qu"fg"lpi gpkgt¶c"lpxgtuc⁷⁹"¶Rlecdgc"{"Vj qo cu." 4233+0GnTcutq|gtq"hwg"gn'xgj ¶ewru"wkrkctkq"hxkcpq"luki pke"fg"KCO G."qtkgpvcf q"re"fgo cpcf" fgnlugevt"r tko ctq0Gnr tqvkr q"ug"fg"lug° »"gp"dcug"re"u"ecr cef cf gu"{"bo cvgtkrgu"fg"re"l¶f wutk" cgtqpª wkec"ªs wg"r qug¶c"re"go r tguc."g"ko kcpf q"{"cf cr vcpf q"gn'fg"lug° q"fg"qtc"eco kqpgv"re"kn'w" f g"wpc"htc"o c"guvcf qwpc"gpug"¶Rlecdgc"{"Vj qo cu."4233+0C"r ctvt"fg"re"u"fg"kn'ewncf gu"v"epkecu"fg" re"go r tguc."c"eqo kgp| qu"fg"3; 77"ug"lpeqr qt»"re"guvcf qwpc"gpug"¶Mckugt"O qvqtu"Eqtr qtcvkp." f cpcf q"pceko kpvq"cf"re"go r tguc"o kzvc"¶kf wutku"¶Mckugt"Cti gpvkpc"¶KMC+"*O eEmwf."4237= O qtgtq."4235+0Cuko kuo q."gp"3; 78"gn'eqo r nglq"r cu»"c"fg"gpqo kpcutg"¶F ktgeek"p"¶P cekqpcn"fg" Hdtkceek"p"¶g"¶kpxguki cek"p"Cgtqpª wkec"¶F ¶KHC +0"

Gp"gnlc° q"3; 7: "ug"fg"kvctqp"re"u"ng"{"gu"fg"lpxgtukppgu"gzvtcplgtcu"fg"ktgevcu"¶Ng{"360: 2+"{" fg"r tqo qek"p"¶kf wutkn"¶Ng{"360: 3+"eqp"gn'qdlgkxq"fg"eqqt¶kpc"re"lplek"vxc"r ¶dreq/r tkxc"cf" {"qvqti ct"xgpvcu"cf"re"u"go r tgucu"tcf kcf cu"gp"gn'vgttkqtk"pcekqpcn"¶Mquceqhh"gv'cn"3; ; 3+0 Guv"ug"hx»"c"ecdq"gp"r ngpc"eqkpek"gpke"eqp"iq"ªs wg"gtc"wp"r gt¶qf q"fg"gzr cpuk"p"vtcpupcekqpcn" fg"re"u"i tcpf gu"htc"o cu"ªs wg"fg"qo kpcdcp"gn'b gtecf q"o wpc knif g"cwqo »xkru"⁷: "¶Uqwtqwkng."3; ; 2+0 Eqo q" tguwncf q." ug" r tqf wq" wp" fg" gugo dteq" o cukxq" fg" go r tgucu" vtcpupcekqpcn" gp" gn' gpvtco cf q" r tqf wvxxq0 Cu¶" c" re"u" ht c"o cu" {"c" kpuvcrcf cu" ¶Hqtf." I gpqtcn" O qvqtu." Ejt { urgt."

⁷⁹KCO G"ug"guvcdrgeek"gp"E»tfgdc"r ctc"wkkt ct"re"u"ecr cef cf gu"v"epkecu"¶kf wutkrgu"fg" gur nqi cf cu"r qt"gn'kpuwkwq" fg"¶kpxguki cekqpcn"¶Cgtqpª wkecu"{"Gur cekrgu"¶KCG+."gn'ewcn'hwg"wp"qti cpluo q"fg"cgtqpª wkec"cti gpvkpc."etgcf q" eqo q"¶kpuwkwq"¶Cgtqpª epkeq"¶K+"gp"3; 650

⁷"F g"guv"htc"o c."re"uc"o gfk"cpwncf g"lpxgtukppgu"gp"gn'ugevt"hwg."gpvtg"3; 82"{"3; 86."ecukf lgl "xgegu"lwr gtlqt"cf" re"fg"gnr gt¶qf q"3; 78/3; 7; "¶Dctcpup."3; 8; <79+0

O gtegf gu'Dgpl "g"MC+"ug"ngu'uwo ctqp" T gpcwv. "Ekt³/gp. "Rgwi gqv" { "Hkw. "ru"ewcngu"t gekdktqp" f kt gevco gpvg" iqu'dgpg hleku" f g"rc"pwgxc" rgi kurcekp" *Rcpi q" gv'crl" 4239-0Gp'3; 89. "ug" guvcdngek" swg" F RHC" ug" f gf lect" c" gzenwukxco gpvg" c" ru" cevxxkf cf gu" f gn' ugevqt" cgtqp^a wleq" { " cgtqgur cekn" f guxkpewt pf qug" f g"rc" kpf wutkc" cwqo qvtk. "cevxxkf cf "s wg" ugt" c" duqtdkf c" r qt" rc" go r t guc" KO G" kpf wutku" O ge^a plecu" f gn' Guvcf q+. "rc" ewcrluki wk" r tqf wekgpf q" gn'o qf gmq" r lenlw" Tcutqlgtq" f wcpvg" guqu" c^o qu0"

Gp'3; 93"ug"ucpekqp»"wp"pwgxc" t² i ko gp"cwqo qvtk "s wg" tghqt | »"gn'eqvvpkf q" pcekqpcn" f g" iqu'xgj "ewru" g" kpvtf wq" rc" r t gqewr cekp" r qt" rc" cr gtwtc" gzt qvtf qtc. "guvcdngekpf q" wp'72' " f g" tglpvi tq" uqdtg" ru" xgpvcu" gzwtpcu' Eqp" wpc" kpvpguc" r tqo qekp" i wdgtpcu gpvcn" guvg" kpegpvkxq" i gpgt»" wpc" ko r qvcpvg" gzt cpukp" f g" ru' gzt qvcekppgu. hwpf co gpvcu gpvg" qtkgpvcf cu" crl'o gtecf q" rc" kpcqo gtecpq⁷: "Dctdgtq" { "O qwc. "4229-0F g" guvg" o qf q. "gn'eqo r rglq" cwqo qvtf" r cu»" c" vpgt" wpc" r qukekp" f g" rnf gtc | i q" f gptq" f g" rc" cevxxkf cf "kpf wutkc" o cpk hucpf q. "gvtg" 3; 82" { "3; 96. "crtgf gf qt" f g"; ' " f gn'vcrnf gn'xcrt" ci tgi cf q" r qt" rc" r tqf weekp" o cpwxcwgtc" { " wpc" r tqf qtekp" c" Ap" o c { qt" f gn'go r rgl⁸²: "Dctdgtq" { "O qwc. "4229-3; 2+0Cu" f wcpvg" ru" f² ecf cu" f g'3; 82" { "3; 92. "iqu'gpuc" drcf qt gu" gzwtpgtqu" ug" eqpxk vktqp" gp" wpc" r kg | c" et wekcnf gn'gus wgo c" f g" kpf wutkc" r cekp. "ukt xkgpf q" eqo q" o gtecf q" hpcn" r etc" wpc" i tcp" r tqf qtekp" f g" kpf wutku" ci wcu" cttkdc" *Rkpc | q. "4237-0'

" P q" qduvcpvg. "c" r guct" f gn'hwgtvg" et geko kpvq" gp" rc" r tqf weekp" f wcpvg" guvg" r tqeguq" pq" ug" nji t»" cngtct" uwwcpvko gpvg" cni wpqu" t cui qu" d^a ulequ" f g" rc" kpf wutkc. "eqo q" rc" gzkvpgpek" f g" o qf gmq" f g" xgj "ewru" qduqngvu" gp" v² to kpu" kpvtpcekqpcrgu. "dclc" eqo r gvxxkf cf " f g" ru" r tqf wequ. { "gucuc" cewcrk cekp" vgepqn" i kec" *Mquceqhh" gv'crl" 3; ; 3-7-0F kej q" cvt cuq" gp" gn' plxgn' vgepqn" i leq" f g" rc" kpf wutkc" r necn" f wcpvg" rc" gvr c" f gn' f guctt qmq" f gn' ugevqt" ug" f gdlc. "gp" i tcp" o gf kfc. "c" wpc" r gs w^o c" gucnc" tgrvxc" f g" r tqf weekp" s wg" f kkwxc" rc" kpeqtr qtcekp" f g" v² eplecu" excp | cf cu. { "c" s wg" j wdktc" f go cpf cf q" kpxgtukppgu" s wg" u»" n" r qf t" cp" ugt" cduqtdkf cu" r etc" plxgrgu" f g" r tqf weekp" uwr gkqtgu" *P qhcn" 3; ; ; <: ; /; 6=Uqwtqvkng. "3; ; 2-343-0"

F g" guvg" o qf q. "ru" guvcvi kcu" cr rkecf cu" r etc" f qvt" f g" o c { qt" f kpcu" kuo q" c" rc" cevxxkf cf " cwqo qvtk " j cd" cp" hcecucf q" c" o gf kcf qu" f g" rc" f² ecf c" f gn' ugvpc" *Uej xct | gt. "3; ; 7-9-0Guv" tco c" j cd" cp" gvtcf q" gp" wpc" gur gekg" f g" o gugvc" r tqf wevxc" eqp" wp" o gtecf q" s wg" quekrcdc" gp" vqtpq" c" o ci pkwf gu" r t gxcu' Gmq" ko r rke»" wp" guvpeco kpvq" { " t gvtcekp" f gn' o gtecf q" kpvtpq. " gur gekm gpvg" c" r ctvt" f gn' r rcp" f g" clwug" f gn' o kpkvtq" f g" Geppqo "c. "Egrguvppq" Tqf tki q."

⁷: "Gpvtg"3; 93" { "3; 98" ug" gzt qvctqp" crtgf gf qt" f g"7; 022" wplf cf gu. "n" s wg" lwpvq" c" et gekpvgu" gzt qvcekppgu" f g" cwqr ctvui gpgtctqp. "gp" guqu" c^o qu. "wp" dcrpeg" eqo gteknf tgf qo kpcvgo gpvg" uwr gtcxkctkq" *Mquceqhh" gv'crl" 3; ; 3-7-4"

⁸²: "Gnr" gtupcnqewr cf q" gp" gn' ugevqt" et geko" f g"; 0 22" tcdclcf qt gu" gp'3; 7; 'c'790622" gp'3; 96" *Dctdgtq" { "O qwc. "4229-3; 2-0"

eqpkek q'eqo q'õTqf tki c| qö. 's wg'kpenw} »'wpc'hwgtv'f gxcnwcek»p'f gn'r guq'cti gpvkp'f { 'ci wf cu' uwdcu'gp'mqu'r tgekqu'f g'mqu'ugt xlekqu'r Àdrlequ0'Cu'f' r'u'pcekpvgu'gzz qtvekqpgu'pq'mji tctqp' eqpvpgt' r' ec'f'c' f'g' r' r' t'qf week»p' s'wg' ko r' r'ke»' r' t'gf week»p' f'gn' o' gtecf'q' k'p'v'g'p'q' f' g'ugpecf' gpcpf'q'wpc'etkuku'ugevqt'kcn'F'wrelej' 'g'v'cu'0'4242-03"

2.1.2 - Fin de la Industrialización por Sustitución de Importaciones y estancamiento productivo en el sector automotor argentino (1976-1990)

Nc"ktwrek»p' f'g' r'c' Ànko c'f'kevcf'w'c'o' k'k'x'c't' c'ti' gpvkp'c'o' qf'k'ke»' u'w'w'p'ek'm' gp'v'g' gn' ugp'f' g't'q'f' g'g'u'w'c't'co' c'k'p'f' w'w't'k'n'f' g'd'k'f' q'c'r'u't'ghq'to' cu'g'w't'w'w't'c'g'u'k'p'u'w'c'f'c'u'gp'g'n'eqpl'w'p'v'q' f'g'r'c'geq'p'q'o' ¶c'Uej' q'tt. "4234-0Nc'eqpl'w'p'ek»p' f'g'r'c't'g'r' t'g'u'k'»p' u'c'm't'k'n'f' g'3; 98'eqp'r'c't'ghq'to' c' h'p'c'p'ek'g't'c'f' g'3; 99.'r'c't'c'p'eg'r'c't'k'c'f' { 'g'n'g'p'f' g'w'f' c'o' k'g'p'v'q'g'z'v'g't'p'q.' f'g't'k'x'c'f' q'u'f' g'r'c'r' g't'w't'c'f' g'3; 9; . " k'p'v'g't't'w'o' r' k'»'g'n'o' q'f' g'm' u'w'w'k'w'k'x'q'c'p'v'g't'k'q't'0'c'p'k'x'g'n'ugevqt'kcn'ug'r' t'q'f' w'l'q'w'p'k'o' r' q't'w'p'v'g'i' k'q'g'p' r'c'q't'k'p'w'ek'»p' f'g'r'c'u'r' q'f'k'k'ec'u'r' Àdr'k'ec'u'0'G'p'3; 9; . 'g'n'i' q'd'k'g't'p'q'o' k'k'x'c't' u'c'p'ek'q'»'r'c'Ng' { "430' 54.⁸⁴ c' r'c't'v't' f'g' r'c' ew'c'n' u'g' c'o' r' r'k't'q'p' r'u' eq'p'v'g'p'k'f' q'u' k'o' r' q't'w'f' q'u' r' g't'o' k'k'f' q'u' u'g' c'w'q't'k' »' r'c' k'o' r' q't'w'ek'»p' f'g'x'g'i' ¶e'w'w'q'u'v'g't'o' k'p'c'f' q'u' { 'u'g'g'r'k'o' k'p'»'v'q'f' c't'g'w't'k'ek'»p'c'r'c'k'p'v'g'i' t'c'ek'»p'x'g't'w'ec'n'f' g' r'c'u' g'o' r't'g'u'c'u' v'g't'o' k'p'c'g'u'0' G'n' t'g'u'w'w'c'f' q' o' a' u' x'k'k'k'g'r' f'g' f'k'ej' c'u' o' g'f'k'f'c'u' s'wg' g'u'w'w'k'g't'q'p' c'eq'o' r'c'o' c'f'c'u' r'q't' g'n' g'u'c'd'g'ek'o' k'g'p'v'q' f'g'w'p' w'r'q' f'g'eco' d'k'q' h'k'q' c'v't'c'u'c'f'q. "h'w'g' w'p' h'w'g't'v'g' e't'g'ek'o' k'g'p'v'q'f'g'r'c'u'k'o' r' q't'w'ek'q'p'g'u'»D'c't'd'g't'q' { 'O' q'w'c. "4229-0U'k'd'k'g'p'r'c'r' g't'w't'c' u'g'o' c'p'w'w'x'q' u'»m' j' c'u'w'3; ; 3.'r'c'f'c'r' w'ek'»p' f'g'r'c'u'v'g't'o' k'p'c'g'u'c'g'u'g'p'w'g'x'q'g'u's' w'g'o' c'f'g't'g'i' r'c'u'f'g'l'w'g'i' q'k'o' r' r'k'e»'l'w' x'k't'w'c'n't'c'p'u'h'q't'o' c'ek'»p'g'p'c'i' g'p'v'g'u'k'o' r' q't'w'f' q't'g'u.'h'c'x'q't'g'ek'f' q't' q't'g'n'c'm'q'p'k'x'g'n'f' g'r' t'g'ek'q'u'k'p'v'g't'p'q'u' c'ng'l'c'f' q'u'f' g'm'u'p'k'x'g'n'u'k'p'v'g't'p'c'ek'q'p'c'g'u'»O' q't'g't'q. "4235-0"

Q'v't'q'f'g'h'q'u'c'ur' g'e'v'q'u'c'ur'k'g'p'v'g'u'f' g'r'c't'c'p'u'h'q't'o' c'ek'»p'f'g'g'u'v'g'r' g't'¶'q'f' q'h'w'g'g'n'hw'g't'v'g'c'w'o' g'p'v'q' f'g' r'c' r't'q'r'q't'ek'»p' f'g' r'c't'v'g'u' { " eq'o' r'q'p'g'p'v'g'u' k'o' r' q't'w'f' q'u' g'p' r'u' x'g'i' ¶e'w'w'q'u' r' t'q'f' w'ek'f' q'u' p'c'ek'q'p'c'm' g'p'v'g'0'G'n'p'k'x'g'n'f' t'q'o' g'f'k'q'f'g'eq'p'v'g'p'k'f' q'k'o' r' q't'w'f' q' u'g'v't'k' r'k'e»'g'p'v'g'3; 95' { "3; ; 2.'f' g'u'f' g' c'r't'g'f' g'f' q't' f'g'w'w'722'r' q't'w'p'k'f' c'f'c'o' a' u'f'g'w'w'30722'r' q't'w'p'k'f' c'f' "O' q't'g't'q. "4235-42+.'v'g'p'k'g'p'f' q' u'g'x'g't'q'u'g'h'g'e'v'q'u'g'p'g'n'g'u'r'c'd'»p'c'w'q'r' c't'v'k'u'c'0'

⁸³U'k'd'k'g'p'g'z'k'w'g'w'p'eq'p'ug'p'u'q'g'p'g'u'v'g'f'k'c'i'p'»u'w'ek'q'u'q'd't'g'r'u'eq'p'f'k'ek'q'p'g'u'f'g'r'c'k'p'f'w'w't'k'c'c'w'q'o' q'v't'k' c'ti' gpvkp'c'c' o' g'f'k'c'f' q'u'f' g'r'c'f'c'f'c'f' g'3; 92.'c'o' d'k'p'ug'g'r'c'd'q't'c't'q'p'q't'q'u's' w'g'o' c'w'k'c'p'g'u'w'g'w'c'0'R'q't'g'l'g'o' r' m'j.'M'c'v' ¶422; +c' r'c't'v't'f' g'n'g'u'w'f'k'q'f'g'ec'u'q'f'g'r'c'r' t'q'f' week»p'f' g'n'H'q't'f'V'c'w'p'w'u' u'q'u'k'g'p'g's' w'g'2' u'g'h'w'g'g'n'f'g'h'g'l'q'f' g'n'r' t'q'eg'u'q'g'x'q'n'w'k'x'q' f'g'r'c'k'p'f'w'w't'k'c'f'g'r' q'u'i' w'g't'c' { 'h'w'g'g'n'ö'r' w'p'q'v'e'À'm' k'p'g'o'f'g'r'c'g'v'c'r'c'f'g'k'p'f'w'w't'k'c'k' c'ek'»p'g'p'f'q'f'k'k'k'f'c'k'p'ek'c'f'c'x'g'l'p'v'g' c'o' q'u'c'v't'a' u'c'n'j' c'd'g't'g'f'g'g'u'c't'q'm'f'q'w'p'p'k'x'g'n'c'n'f'g'g'ec'r'c'ek'f'c'f'g'u'v'z'ep'le'c'u'q'ec'g'u's' w'g'p'q'x'q'k'g't'¶'c't'g'r'g'v't'g'g'p'g'n' o' q'f' g'm'f' t'q'f' w'v'k'x'q's' w'g'h'g'w'eg'f' g't'¶'0'G'n'c'w'q't' u'q'u'k'g'p'g's' w'g'2' u'g'p'q'g'u'w'p'ec'u'q'c'k'ur'f'q.'u'k'p'q's' w'g't'g'h'g'l'c'd'c'g'n'c'o' d'k'g'p'v'g' k'p'f'w'w't'k'c'n'f'g'r'c'2' r'q'ec' { 'g'n'r' t'q'eg'u'q'g'x'q'n'w'k'x'q'f'g'w'p'i' t'c'p'p'À'o' g't'q'f'g'g'o' r' t'g'u'c'u.'r' q't' r'q'ew'c'n't'g'r'v'k'k'c' r'q'u'g'p'h'q's' w'g'u' s'wg'ug'o' c'r'c'p'g'n'c'v't'c'q'v'g'ep'q'n'i' l'eq'g'p'g'n'f'uge'v't'f' w'c'p'v'g'f'k'ej' q'r'g't'¶'q'f' q'0'

⁸⁴E'w'f'q' h'p'g't'c' g'n'f'g' "insertar al sector productor dentro del orden económico general, posibilitar su mejoramiento tecnológico, permitir la apertura de mercados de exportación, e inducir una creciente competitividad interna y externa" »R't'g'u'k'f'g'p'ek'f'g'r'c'P'c'ek'»p.'3; 9; +0'

Cuko kuo q." r" ecff c" f gn' ucrtkq" tgcn" s wg" ug" ci tcx»" eqp" gn' eqrnr uq" f gn' r tqi tco c" geqp»o leq" f g" O ctvfpjg| "f g" J q| . "f qpf g' r gtf k»" o " a u" f g" 62' " f g" uw' xcmq" gpv g" gn' r leq" f g" 3; 96" { " 3; : 5" *Dkn" 4239c: ; ; + " vco dk p" i gpgt»" wpc" hwgtv g" ecff c" gp" rnu" xgpvcu" f g" cwqo »xkrgu." r tkpek r cm gpv g" gp" nqu" o qf grqu" o " a u" geqp»o lequ' O' Gn' ugi o gpv q" f g" cwqu" r gs wg° qu. "s wg" j cd" f c" gzr gtlo gpvcf q" gn' etgelo kgpv q" o " a u" cegrntcf q" gp" r" f² ecf c" r t g x k c. "ug" t gf w l q" f g" hqto c" f tª uwec O' Nc" xgpvc" ug" eqpegpv t»" gp" o gf kcpqu" { " f g" i co c" cnc. " eqttgur qpf kgpvcu" c" ugevtgu" f g" o glqtgu" kpi tguqu" *Dkn" 4239d < 523 + 0 F guf g" 3; 98" c" 3; : 4. " r" r tqf week p" f g" xgj f e w r u" ec { » 58' . " r q" s wg" tgr t g u g p v »" gp" 3; : 4" *3450 422" w p k f c f g u" e c u k' r" o k c f " f g" r" r tqf week p" f g" 3; 97" *462 0 22" w p k f c f g u" + * O q t g t q. " 4235 < 3: + 0

O k p v t c u " r " k p f w u t k " c w q o q v k | " { " c w q r c t v k u c " f g " C t i g p v k p c " u w t f c " g u v c u " t g i t g u k a p p g u " r t q f w e k x c u . " r " h w p e k » p " f g " r t q f w e e k » p " c w q o q v k | " g u x d c " o w c p f q " u k i p k h e c v k x c o g p v g " g p " n q u " r t k p e k r c r g u ' e g p v t q u ' f g ' r t q f w e e k » p ' i m d c i r O G p ' d w u e c ' f g ' p w g x q u ' u q r q t v g u ' r c t c ' g n ' c j q t t q ' f g ' v k g o r q " { " r " i c p c p e k " f g " r t q f w e k x k f c f " u g " r c u » " f g " r f p g c u " w p k k o g p u k a p c r g u " f g " t k o q " t f k f q " c " q t i c p k c e k a p p g u " o w n k f k o g p u k a p c r g u . " g p " t g f " { " c " t k o q u " h g z k d r g u O ' G u " f g e k t . " e c o d k » " r " h q t o c " f g " r t q f w e e k » p " g p " b o c u c " f g " d k e p g u ' k p f k h g t g p e k f q u ' r q t " w p c " f g " e t g e l o k g p v q " b o " a u " h g p v q " { " f k h g t g p e k f q . " e q o g p | c p f q " r " g t c " f g " r " e q o r g v g p e k " r q t " r " e c r i k f c f . " f g " m u " r t q f w e v q u " g u r g e k h e c f q u " { " f g " r " h c d t l e c e k » p " r q t " i q v g u O F g " g m q ' t g u w n c " r " p g e g u k f c f " f g " r f p g c u " h g z k d r g u " f g " o c p w h c w w t c . " m j t c p f q " h c d t l e c t " u l p " w p c " b o c { q t " t g q t i c p k c e k » p " r t q f w e v q u " f k h g t g p v g u " c " r c t v k " f g " w p c " b o k u o c " q t i c p k c e k » p " dª u l e c " f g " h u " g s w k r q u " { " e q p " w p c " t g f w e k f c " f g o q t c " f g " c l w u g " * E q t k c v . " 4222 + 0

C" guvcu" o qf k h e c e k a p p g u " u g " u w o c t q p " r n u " k p p q x c e k a p p g u " v g e p q n i k e c u " c " r c t v k " f g " r " c r c t l e k » p " f g n ' o k e t q e j k r " g p " 3; 93" { " n w g i q " f g " r " e q o r w c f q t c " { " r n u " V K E u O ' G u v q u " c x c p e g u " e k g p v f h e q u " { " v e p l e q u " r q v g p e k t q p " c A p " o " a u " m u " e c o d k u " f g u e t k r v q u " r t g e g f g p v g o g p v g . " r g t o k k g p f q " c n q u " p k x g r u " f g " e q p v t q n ' k p o g f k c v q " f g " r " r t q f w e e k » p " { " o c { q t g u " i t c f q u " f g " c w q o c v k c e k » p " k p f w u t k c i r O G u v c " u g t k g " f g " e c o d k u " b o c t e c t q p " g n ' tª p u k q " f g n ' f o r d i s m o " c i l t o y o t i s m o . " w o d k p " f g p q o k p c f q " p r o d u c c i o n f l e x i b l e { " g p " m q " t g h g t g p v g " c " r " k p f w u t k c " c w q o q v k | " o w p f k e n ' e q p u q r i k » " c " L c r » p " e q o q " w p q " f g " m u " i t c p f g u " r t q f w e v q t g u " c w q o q v k l e g u " * D q { g t " { " H t g { u g p g v . " 4224 = E q t k c v . " 4222 = J g l o . " 4238 = D k n " 4239 c + 0 5 " G n ' t q n ' s w g " w x q " V q { q v c " O q v q t " E q t r q t c v k a p " g p " g u v q u " e c o d k u " f g n ' e c r k e r k u o q " o w p f k e n ' u g tª p " t g x k u c f q u " g p " o c { q t " r t q h w p f k f c f " g p " g n ' r t » z l o q "

⁸⁵ "Guvqu" eco dkqu" ug" f cp" gp" gn' o cteq" f g" wp" r tqegu" o " a u" r tqhwf q" f g" vcpuhqto cek»p" f gn' o qf q" f g" cewo wrek»p" ecr kcrkuc" i m d c i r O G u " f g e k t . " f g " r " f k u q n w e k » p " f g n ' o q f g m ' h q t f k u c / m g { p g u k p q ' s w g ' r g t o k k » " r " k p v g i t c e k » p " f g " r " e r c u g " v t c d c l e f q t c " { " g n ' o q f q " f g " t g i w r e k » p " r q i f k e c " g p " v q t p q " c i l ' G u v f q " f g " d k e p g u c t " r c t c " m g x c t " c " e c d q " r t q i t g u q u " g p " r " r t q f w e e k » p . " e q p " c n c u " c u c u " f g " i c p c p e k " { " w p " e t g e l o k g p v q " g e q p » o l e q " t g r v k x c o g p v g " e q p u c p v g " * J k t u e j . " 3 ; 9 + 0 U k p " g o d c t i q . " c " h k p g u " f g " r " f² e c f c " f g " 3 ; 82 " g u g " o q f q " f g " c e w o w r e k » p " e q o k g p l c " c " g p v t c t " g p " e t k u k u " c " r c t v k " f g " r " e c f f c " g p " r n u " v c u c u " f g " i c p c p e k " { " r " t g c p k o c e k » p " f g n ' e q p h e v q " f k u t d w k x q " g p v t g " e c r k e r i l { " v t c d c l q . " i q " e w e n l u g " g z r t g u » " g p " r " e t k u k u " f g n ' r g t » n g q " f g " 3 ; 95 " * J c t x g { . " 4229 + 0 " G u v q " w x q " f k x g t u c u " e q p u g e w g p e k u " g p " m u " r t q e g u q u " r t q f w e k x q u " e q o q " g n ' c w o g p v q " f g " r " r t q f w e k x k f c f " r q t " v t c d c l e f q t " q " r " k p v g t p c e k a p c r k c e k » p " { " h p c p e k t k c e k » p " f g n ' e c r k e r i l " * J c t x g { . " 4229 + 0

ecr ¶wraq0'

Gp" grl' r rcpq" rpecn" cpvg" rnu" eqpugewpeku" pgi cwxcu" swg" wxkgtqp" rnu" eco dkqu" o cetqgeqp»o lequ" g" kpuwkwelqpcrgu" gp" grl'ugevqt" lpf wutkcnl{ "uw'tco c"cwqo qvkl . "uwo cf q" c"rc" tggut wewtcel»p" kpwgt pcekppcnl'f grl'ugevqt. "rcu" hko cu" f grl'eqo r rglq" cwqo qvqt" tgf kug° ctqp" uwu" gutcvgi kcu" go r tguclkrnu0Gpvt g" gmcu. "ecdg" o gpekqpct" grl'eco dkq" f g" gphqs wg" f g" rc" r tqf week»p" f g" cwqo »xkrnu" ej lequ" r qt" i tcpf gu. "grl' tgf ko gpukppco kgpvq" { "tgqtkgpvecl»p" f g" rc" qhgtvc. "rc" tcekppcnl' cel»p" f g" rc" o cpq" f g" qdte. "rc" r t guggpvecl»p" f g" pwxqu" o qf grnu" q" grl' gvt q" f g" rc" o c{ qt" ¶c" f g" rnu" cpvki wqu⁸⁶"

C"uw'xgl . "gp"3; : 2"grl' qdkgtpq" o kxct" egtt»" f ghpkkxco gpvg" KO G0Gp" grl' o qo gpvq" f g" uw" ekgttg. "rc" go r tgucl" eqpvcde" eqp" o " u" f g" 92" r tqxggf qtgu. "322" eqpegukppctkqu" gp" vqf q" grl' r c¶u" { " o " u" f g" 5222" go r rgef qu0' Uw' xgl ¶ewraq" o " u" r qr wct. " grl' Tcutqlgtq" F kgugn" f qo kpcdc" e»o qf co gpvg" grl' o gtecf q" f g" r leniwr u" f kgugn' eqp" grl'9: ' " f g" r ct vekl cel»p" *Rlecdgc. "4239+0Cu¶" eqp" grl' ekgttg" f g" KO G" vto kp»" rc" r tqf week»p" f grl' Tcutqlgtq0' C" r ctvt" f g" guvq. "Hqtf "ug" xkq" hwgt vgo gpvg" dgpghkekf c" { c" s wg" ug" t gvt ctqp" uwu" f qu' eqo r gvt qtcu" eqppcekppcrgu" { "grl' ekgttg" f g" KO G" r g" gl»" r t^a evleco gpvg" wp" o qpqr qrkq" f grl' ugi o gpvq" wkrkctkqu" r kxkcpqu" { "ugo k r kxkcpqu0' C" rc" xgl " s wg" grl' Tcutqlgtq" f glcdc" f g" r tqf wektug. "rc" go r tgucl" pqtvgco gtekcpc" tgerkl' cdc" wpc" gzr cpuk»p" uki p hkecvxc" f g" rcu" wpl' cf gu" r tqf wekf cu" f g" rnu" f hgt gpvqu" o qf grnu" f g" uw' r leniwr "H/ 322" *Rlecdgc. "4239+0'

Gp" tguwo gp. " guvqu" eco dkqu" f lgtqp" nvi ct" c" wp" r tqeguq" f g" eqpegpvtcel»p" { " tcekppcnl' cel»p" r tqf wekxc" f wtcpvg" rc" f² ecf c" f g"3; : 20Gp" v² to kpqu' eqo gtekrnu. "o kgpvtcu" s wg" r ctc" rc" lpf wutkcnl" vto kpcn' guvg" r gt¶qf q" hwg" f g" wpc" pwr" kpugetel»p" gzvtpc. "f wtcpvg" rnu" Anko qu" c° qu' f grl' gegpkq" rc" tco c" cwqr ct vlc" rqi t»" eqpvgpgt" grl' cxcpeg" f g" rcu" ko r qt vcekppgu" f g" rnu" c° qu" cpvgtkqtgu" ug" guvclrk »" g" kpenwq" f kuo kpw{ »" uw" f² hkekv" eqo gtekn" j cekppf q" f gueppf gt" rnxgo gpvg" grl' xcmqt" f g" rcu" ko r qt vcekppgu" f g" cwqr ct vgu" r tqo gf kq" r qt" xgi ¶ewraq" r tqf wekf q" *F wrelej "gv'cn0"4242<329+0Guq" ug" f gdg" c" s wg" rc" etkuku" f g" hpcrgu" f g" rc" f² ecf c" f g"3; : 2' f gr tko k»" rc" r tqf week»p" rpecnl' { " chge»" pgi cwxco gpvg" rcu" ko r qt vcekppgu. "cu¶" eqo q" r qukekpp»" c" rc" ucrl' c" gzr qt vcf qtc" eqo q" wpc" cmgt pcvxc" cpvg" rc" hwgt vgt gvt ceek»p" f grl' o gtecf q" kpwgt pq0'

"

⁸⁶"Rqt" qtc" r ctvg. "cni wpcu" go r tgucl" f grl'ugevqt" vto ctqp" eco kpu" o " u" tcf lekrnu" 3+" tgvk^a pf qug" f grl' r c¶u. "eqo q" I gpgcnl' O qvqtu" gp"3; 9: "q" Ekt³ gp" gp"3; 9; =4+" tcpuht kpf q" r gteckppgu. "eqo q" Ej t { ungt" c" Xqmuy ci gp" gp"3; : 2=" 5+" hwukpcpf q" uwu" hko cu. "eqo q" Hcv' { "Rgwi gqv' s wg" et gctqp" Ugxgrl' { "rc" xgpf lgtqp" cnl' twr q" rpecnl' O cetk' gp"3; : 4. "q" 6+" wpl' gpf q" rcu" hkecvxc" f g" Cti gpvpc" { "Dtcuka" eqo q" Hqtf " { "Xqmuy ci gp" s wg" hqto ctqp" rc" hko c" Cwqr vpc" gp"3; : 8. " rc" r tko gtc" gzr gtekekf" f g" eqqtf kpcel»p" tgi kpcnlf" grl' tqf week»p" cwqo qvkl "Dkn"4239c=I ci i gtq" { "Rgtgl' "Cm cpuk" 4242+0'

2.1.3 - La reconfiguración de la industria automotriz en el marco de las reformas estructurales y la creación del mercado regional (1990-2001)

"Eqo q'r ctvg'f g'mu'eco dkqu'gp'rc'tggutwewtcek»p'f gn'ecr kcrkuo q'o wpf knif g'kpcngu' f gn'uki m"ZZ"ug'r tqf wltqp"qvcu"o qf hkecekppgu'gp'rc'qti cpk cek»p'f g'rc'r tqf week»p's wg' wco dk»p' wxkgtqp" eqo q' qdlgvkxq" rtkpek cn' i cpct" eqo r gvkkxf cf " tgf wekppf q" eququ" { " cwo gpvcpf q" rc" xctkfcf " *I gtghk' gv'cn0" 4223." 4227+0' Gp" gn' egpvtq" f g" guqu" eco dkqu" ug" gpewgpvtcp'rcu'f gekukppgu'f g'ekgtcu'go r tgucu'o wmkpcekppcngu'f g'vcpuhgtk'cni wpcu'cevkxf cf gu' /i gpgtcm gpvg.'rcu'o gpqu'tgpvdrnu' { 'uqhkuecf cuó'f gn'r tqeguq'r tqf wekxq'j cek'qvcu'go r tgucu' *out-source+ { 'qvtqu'r c'fugu'*offshore'+óo c { qto gpvg'f g'rc'r g'kgtk0F g'guvg'o qf q.'rcu'go r tgucu' vttegtk ctqp'mu'r tqeguq'r tqf wekxqu'i gp²tlequ'q'f g'dclq'xcnqt. 'egpvtcf qu'gp'gn'xqno gp' { "gp" rc" eqo r gvkkxf cf /r tgekq." r gtq" tgwxkgtqp" r ctc" u'f' mu' ugi o gpvqu" s wg" o ^a u" xcmt" ci tgi cp." hqto cpf q'rcu'EI Xu'*Rqtvc'gv'cn0'4239+0"

Eqo q'tguwncf q'f g'f lej qu'eco dkqu.'gp'rc'ecf gpc'f g'xcmt'cwqo qvtk' 'o wpf knibg'f kgtqp" qvcu'vppf gpeku'eqo r ngo gpvctku's wg'chgevtqp'rcu'tgrcekppgu'gpvtg'mu'f kwpvqu'gurdppgu'f g' rc"ecf gpc."² ucu"ug"mco ctqp" *commonolisation.* " *modularisation* " { " *global sourcing* *Ct| c" { " Nqr gl . '422: + Nc'*commonolisation*'ko r rde»'gzvppf gt' { 'eqo r ctvt'rc'r rvcqto c⁸⁷'c'gucm'i mdcn' r ctc'rc'hcdtlecek»p'f g'f kgtgpvgu"o qf grnu." gu'f gek. 'rc'r ctvg'kphgtkq'f g'mu'xgj 'fwrqu'*ej cuku." vcpuo k»p." uwur gpuk»p+." kpenkfc" c" xgegu" rc" o qvqtk cek»p." cu'f' eqo q" mu' eqo r qpgpvgu" o ge^a plequ'o ^a u'ko r qtvcpvgu. { "eqpegpvtct'vq cu'rcu'cevkxf cf gu'f g'f kug° q'f g'r tqf wev'gp'wpcu' r qecu'mecrk cekppgu'*Dcuqu'Vki tg'gv'cn0'3; ; ; +0"

Nc'ugi wpf c'vppf gpek.' *modularisation.* "uki p'khec'r gpuct'cn'cwqo »xkn'eqo q'wp'ukugc" s wg'r wgf g'ugt"tgeqphi wtcf q" c" r ctvt'f g"o qf hkect'mu'uwdukugo cu's wg'm' eqo r qpgp0'Guwq" ko r rde». "gp'mu'j gejq. "cuki pct'o c { qtgu'tgur qpucdkkfcf gu'c'mu'r tqxggf qtgu'f g'uwdukugo cu' *mega-suppliers q'sistemistas+." eqp's wkepgu'rcu'vgo kpcngu'kpggp'wpc'tgrcek»p'ecf c" xgl "o ^a u' uko dk»lec. 'cnr wpvq's wg'tgcrk cp'cevkxf cf gu'f g'kpi gpkgt'c'ulo wn³ pgc0Rqt'guvg'o qvxxq.'gp'hw' ct" f g'crgpvt'rc'eqo r gvpekc'gpvtg'wp'pÀo gtq'grgxcf q'f g'r tqxggf qtgu'r ctc'tgf wek'mu'eququ.'rcu' vgo kpcngu'j cp'dwuecf q' guvdrgegt'tgrcekppgu'f g'o ^a u'rci q'r rc| q'eqp"wp"o gpqt'pÀo gtq'f g' r tqxggf qtgu's wg'gp'gn'r cucf q'*Ct| c" { "Nqr gl . '422: =Dctngwc'gv'cn0'4235+0"

Cu'f'rcu'vgo kpcngu'go r gl ctqp" c'cdcuvegtug'f g'mu'o kuo qu'r tqxggf qtgu'gp'ewens wgtc" f g'rcu'mecrk cekppgu'gp'f pff g'f gek cp'r tqf wek. "ko r rdecpf q'wpc'vcpupcekppcrk cek»p'f g'rcu'

⁸⁷Ug'gp'vppf g'r qt'r rvcqto c'c'wp'gpucodrg'r tlo ctik'gutwewtcln'qtvcf qt'f g'ecti c'f g'wp'xgj 'fwrqu'cwqo qvt. 's wg' f g'vgo kpc'gn'co c° q'd^a uleq'f g'gug'xgj 'fwrqu' { "eqphqto c'rc'dcug'gutwewtcln's wg'uqr qtvc'gn'vtp'o qvtk. { "ukt'xg'f g' wkp»p'f gn'xgj 'fwrqu'cwqo qvt'gp'f kxgtuqu'vr qu'f g'dcukf qtgu.'vrgu'eqo q'r ctc"o qpvc'lg'f g'ecttqegt'c'."dcukf qt' f lo gpukppcn'q'ecttqegt'c'w'pkctk0

go r t g u c u ' c w q r c t v k u c u ' G p ' c n i w p q u ' e c u q u ' r u ' c w q r c t v k u c u ' r c u c t q p ' c ' u g t ' g o r t g u c u ' r k i c f c u ' x ' f ' c ' r c t v k e r c e k p ' c e e k q p c t k ' c ' r u ' r t q r k u ' v g t o k p c r g u . ' o k g p v t c u ' g p ' q v t c u ' e q p v k p w c t q p ' e q o q ' h t o c u ' k p f g r g p f k g p v g u . ' r g t q ' f ' g ' i t c p ' v c o c ° q ' { ' e q p ' e c r c e k f c f ' f ' g ' k p v g t p c e k q p c r k ' c t u g 0 G u g ' h g p » o g p q ' g u ' f g p q o k p c f q ' g l o b a l s o u r c i n g ' } { ' u g t ' f ' c ' r u ' v g t e g t c ' f ' g ' r u ' v g p f g p e k u ' i m d c r g u ' G p ' C t i g p v k p c . ' r u ' r t g h g t g p e k ' s w g ' v g p g p ' r u ' v g t o k p c r g u ' r q t ' g n ' g l o b a l s o u r c i n g ' c h g e w ' g p ' i t c p ' o g f k f c ' c n ' c w q r c t v k u o q ' h q e c n ' g p ' e w c p v q ' g u v u ' m e g a - s u p p l i e r s ' q ' s i s t e m i s t a s ' p q ' u g ' t c f k s w g p ' g p ' g n i r c ' f u ' * C t | c ' { ' N q r g l . ' 4 2 2 : - 0 8 8 "

" R q t ' q v t q ' r c f q . ' g u v g ' u g e v q t ' u g ' k p v g i t » ' i m d c m g p v g ' g p ' r u ' f 2 e c f c ' f ' g ' 3 ; : 2 ' c w p s w g ' m ' j k q ' e q p ' h w g t v g u ' t c u i q u ' f ' g ' g u e c r ' t g i k p p c n ' * T w i o c p ' { ' E q m k p u q p . ' 4 2 2 6 = U w t i g q p ' g v ' c r i ' 4 2 2 ; - 0 9 ' G u v q ' u g ' f g d g ' c ' w p ' e q p l w p v q ' f ' g ' h c e v t g u . ' v c r g u ' e q o q < 3 + ' r u ' v g t o k p c r g u ' k p v g t c e v k p ' e q p ' q v t q u ' c i g p v g u ' g p ' r u ' t g i k p p g u ' g p ' f q p f g ' r t q f w e g p ' { ' x g p f g p . ' v p v q ' o c i w c u ' c d c l q o ' * r t q x g g f q t g u ' e q o q ' o c i w c u ' c t t k d c o ' * f k u m k d w k f q t g u ' e m x g u . ' u g t x k e k q u ' f ' g ' h k p c p e k o k g p v q . ' o c p v g p k o k g p v q ' { ' t g r c t c e k p . ' g v e 0 : ' m ' e w c n i h g x c ' c ' s w g ' j c { ' c ' w p c ' t g i k p c r k c e k p ' f ' g ' r u ' q r g t c e k q p g u . ' v p v q ' r q t ' e w g u k q p g u ' f ' g ' e g t e c p ' f ' c ' h f j u k e c ' / s w g ' r g u c p ' h w p f c o g p v c m g p v g ' g p ' g n ' e c u q ' f ' g ' m u ' r t q x g g f q t g u / . ' e q o q ' f ' g ' e c r w t c ' f ' g ' o g t e c f q u / e q p v c t ' e q p ' t g f g u ' f ' g ' f k u m k d w e k p . ' h k p c p e k o k g p v q ' { ' r q u x g p v c ' d k g p ' g u v c d r g e k f c u ' g u ' h w p f c o g p v c n ' g p ' g u g ' u g p v k f q / = 4 + ' r q t ' d c t t g t c u ' e w w t c r g u = 5 + ' r q t s w g ' r u ' g e q p q o ' f u ' f ' g ' g u e c r ' f ' g ' r t q f w e e k p ' w u w c m g p v g ' u g ' m j t c p ' u c v u h c e g t ' t g i k p p c m g p v g = 6 + ' r q t ' t g i w c e k q p g u ' e q p e g t p k g p v g u ' c n ' o g f k q ' c o d k g p v g . ' u g i w t k f c f . ' g v e 0 = 7 + ' r q t ' g n ' w u q ' f ' g ' e q o d w u k d r g u ' g u r g e ' h e q u = { ' v c o d k p . ' 8 + ' r q t s w g ' g n ' p k x g n ' f ' g ' r u ' r t q v e e k q p g u ' c t c p e g n t k u ' u g ' f ' g h k p g ' g p ' o w e j q u ' e c u q u ' c ' p k x g n ' t g i k p p c n ' * T w i o c p ' { ' E q m k p u q p . ' 4 2 2 6 - 0 : "

G p ' C o 2 t l e c ' f g n ' U w t ' g u c ' h q t o c ' f ' g ' k p v g i t c e k p ' t g i k p p c n ' f g n ' u g e v q t ' u g ' x l q ' g z r t g u c f c ' g p ' r u ' R q r i f l e c ' C w q o q v t k ' E q o A p ' * R C E + ' g p v t g ' C t i g p v k p c ' { ' D t c u k r 0 ' N q u ' r t k o g t q u ' c p v g e g f g p v g u ' f ' g ' r u ' R C E ' f c w p f ' g n l c ° q ' 3 ; : : ' e w e p f q . ' f g p v t q ' f g n R t q i t c o c ' f ' g ' k p v g i t c e k p ' { ' E q q r g t c e k p ' G e q p » o k e c ' * R K E G + ' u c p e k q p c f q ' g p ' f k e l g o d t g ' f ' g ' 3 ; : 8 . ' c o d c u ' p c e k q p g u ' e g n g d t c t q p ' g n ' R t q v e q m ' 4 3 A t g h g t k f q ' c ' r u ' t g i w c e k p ' f ' g ' i q u ' h w l q u ' f ' g ' e q o g t e k q ' f g n ' e q o r m l q ' c w q o q v t ' * X k u r q . ' 3 ; ; : - 0 P q ' q d u v c p v g . ' p q ' h w g ' j c u v c ' g n ' c ° q ' 3 ; ; 3 ' s w g ' f k e j c ' p q t o c v k x c ' g p v t » ' g p ' x k i q t . ' n w g i q ' f ' g ' u w h k t ' x c t k u "

⁸⁸ Nq'paxgf quq'f'g'guc'pwxo'eqhki wtcekp'gu's wg. f'gnlo kuo q'o qf'q's wg'hu'ukugo kucuf'gygpcp'wp'o gpat'vco c° q' tgn'vxxq's wg'gn'f'g'uwu'f'go c'p'f'cp'v'g'u'ru'v'g'to kpcrgu. 'ru'c'w'q'r'c't'v'k'u'c'u'f'g'ug'i'w'p'f'q' { 'v'g'e'g't'p'k'x'g'n' / o w'e'j'q' " o ° a u' c'v'q'o'k'c'f'c'u' { 'e'q'p' " o'g'p'q't'g'u'p'k'x'g'r'u'f'g' " e'q'p'e'g'p't'c'e'k'p'f'g' " e'c'r'k'c'n' { 'f'g'u'c't't'q'm'q' " v'e'p'q'n' i' l'e'q' / 'f'g'd'g'p' " g'p'h't'g'p'w'c't' " v'c'o' d'l'k'p' " w'p' " q'r'i'k' q'r'w'p'l'q' " e'q'p' " e'c'r'c'e'k'f'c'f' " f'g' " l'o' r'q'p'g't' " e'q'p'f'k'k'q'p'g'u' " r'g't'q' { 'c' " p'q' " e'q'p'h'q't'o'c'f'q' " r'q't' " i'q'u' " h'c'd't'k'c'p'v'g'u'f'g' " x'g'i' " f'e'w'q'u' " u'k'p'q' " r'q't' " i'q'u' " u'k'v'g'o'k'u'c'u' " *f'p'e'j'c'w'r'g' " { " I'c't'e'f'c' " . 4239+0 "

⁸⁹ F'g'v'q'f'c'u' " h'q't'o'c'u' " g'n'l'o'c' { q't' " x'q'm'o'g'p' { 'i'q'u' " r't'q' { g'e'v'q'u' " o' " u' " l'o' " r'q't' " v'c'p'v'g'u' " f'g' " K'F' " f'g' " r' " l'p'f' " w'w't'k' " u'g' " o' " c'p'v'k'g'p'g'p' " i'q'u' " r'c' " f'g'u' " f'g' " q't'k'i'g'p' " f'g' " f'k'e'j'c'u' " h't'o'c'u' " *U'w't'i'g'q'p' " g'v'c'r'i' " 422 : - 0 "

⁸ : 'C'u'f' " u'g' " e'q'p'h'q't'o'c't'q'p' " f'k'u'p'v'q'u' " o' " g't'e'c'f' " q'u' " t'g'i' " k'p'c'r'g'u' " g'p'v't'g' " i'q'u' " s'w'g' " u'g' " r' " w'g'f' " g'p' " f' " h'g't' " g'p'e'k't' " g'p'v't'g' " r' " l'p'v'g'i' " t'c'e'k'p' " g'p'v't'g' " r'c' " f'g'u' " f'g' " g'u'c't't'q'm'f' " q'u' " *P'CHVC . 't'q't' " g'l'g'o' " r' " m' " + " q' " g'p'v't'g' " r'c' " f'g'u' " g'p' " f'g' " u'c't't'q'm' " *O' " g't'e'q'u'w' " q' " C'UGCP " +0R'q't' " u'w't' " c't'v'g' " 'E'j' " l'p'c' " g' " k'p'f'k' " u'g' " x'g'p' " g'z'e'g'r' " w'c'f' " q'u' " f'g' " g'v'c' " e'q'p'h'q't'o' " c'e'k'p' " { " u'k'i' " w'g'p' " r' " t'q'f' " w'e'l'g'p'f' " q' " c' " p'k'x'g'n' " p'c'e'k'q'p'c'n' " *D'c't'w'l' " g'v'c'r'i' " 4239+0 "

o qf kkecekppgu" { "ugt "kpenwkf c"gp"gn'Cewgtf q" f g"Eqo r ngo gpvcek»p"Geqp»o lec "CEG+P à'36⁸:" egrgdctf q" gp" gn' o cteq" f g" r" Cuqekcek»p" Ncvkqco gtlepc" f g" kvgi tcek»p" *CNCF K⁹²" Ncu" f kur qulekqpgu" o "u" tgrgxcpvgu" r ctc" r" ecf gpc" cwqo qvtk " gtcp" gn' tvcwo kgpvq" f g" r tqf wevq" pcekqpcnr ctc"qu'xgj "fwaru" { "cwqr ctvgu" f g" co dqu' r c"lgu"gp"gn'o gtecf q" f gn'uleq" eqo gtekn" r" tgo qek»p" f g" ddtgtcu' r ctcctpegrtkcu"gp"gn'eqo gtekq" dkrvgtcn"gn'kpvgteco dlq" dkrvgtcn'hdg' f g" ctcpegrgu' r ctc"wp"ewr q" f gvto kpcf q" f g" xgj "fwaru"⁹³ { "gn'kpvgteco dlq" dkrvgtcn'hdg' f g" ctcpegrgu" r ctc" rcu" cwqr ctvgu. " r qt" wp" ewr q" s wg" pq" f gd" f" uwr gtct" gn' 37' " f g" rcu" gZR qtvekpqpgu" HQD" f g" xgj "fwaru" f g" ecf c' r c" l. " { "dclq" r" eqpf kek»p" f g" s wg" ug" ewo r r" eqp" rqu' tgs wukqu" f g" eqpvkpf q" r qecr'gzki kf qu"gp" ecf c' r c" l. "gpvtg" qvtcu" *F walej "gv'cr0"4242-0Guv" cewgtf q" c" Ap" pq" tgi wrdc" gn' eqo gtekq" gzvc| qpc" f g" b cpgtc" eqplwpc" = { "b cpwxq" r" tgrgxcpek" f g" rqu' tgi " b gpgu" pcekqpcrgu" xki gpvgu" gp" ecf c' r c" l. " *I a ttq " { "Rcpki q. "4238-0"

Eqpeqo kcpvgo gpvg. " f wtcpvg" r" f² ecf c" f g" 3; ; 2" gp" Cti gpvkc" ug" f gur rgi » "wp" r tqeguq" f g" r tqhwf k cek»p" f g" rcu' r qf" kcu' ko r ngo gpvcf cu' c" o gf kcf qu" f g" r" f² ecf c" f g" 3; 92.⁹⁴ " rcu' ewcrgu" ug" xkgtq" eqo r ngo gpvcf cu" { " tghqt| cf cu" eqp" r" eqpxgtuk»p" hkc" gpvtg" gn' r guq" { " gn' f » rct" guvcf qwpk gpug" r qt" o gf kq" f gn' r rcp" f g" r" eqpxgtvdkrf cf " *Dcuwrf q. "4228=P qej vgh "3; ; ; -0" F wtcpvg" guvg" r gt" qf q" gn' ugevq" kpf wutkcn' tguwn» " uwo co gpvg" chgevcf q. " eqpuqk^a pf qug" wpc" vpf gpek" c" r" "desindustrialización" s wg" ug" j cd" f" kpekcf q" c" o gf kcf qu" f g" rqu' c" o qu" ugvpvc" *C| r k| w'gv'cr0"4223=Uej xct| gt. "3; ; ; -0"

P q" qduwcpvg. " gn' gurcd»p" vto kpcn' f gn' ugevq" cwqo qvt "pq" ug" xkq" r gtlwf kecf q" r qt" rcu" tghqto cu" gutwewtcrgu" f g" f lej c" f² ecf c. " { c" s wg" ug" dpgghek»" eqp" wp" pwgxq" 0T² i ko gp" Cwqo qvtk ò" s wg" eqo r tgpf k» "wpc" ugtkq" f g" f getgvqu" f kevcf qu" gpvtg" 3; ; 2" { "3; ; 40Nc" gutwewtc"

⁸: "Ugi Àp" eqpuw" gp" gn' Rtqvqeqm" s wg" r" f c" qtki gp. "o gf kcpvg" uw'kpuwvtecek»p" rqu' r c" lgu" r tgvvpf "cp<ða) expandir y diversificar, de forma dinamicamente equilibrada, el intercambio bilateral en el sector de la industria automotriz; (...) e) aumentar la participación [regional] de partes, piezas y componentes, en especial de los componentes de elevado valor agregado o de elevado contenido tecnológico; (...) g) mejorar el balance de divisas, tendiendo a generar saldos positivos en el intercambio con terceros países. (00) *CEG+P À'36. "Cpgezq" XKK' Ct v03 À'3; ; 2+0" ⁹² " CNCF K' gu" wp" qti cpkuo q" kpvgti wdgtppo gpvci' s wg. " eqpvkpwcpf q" gn' r tqeguq" kpekcf q" r qt" r" Cuqekcek»p" Ncvkqco gtlepc" f g" Nkdtg" Eqo gtekq" *CNCNE-+ "gp" gn' c" o q" 3; 82. " r tqo wvgxg" r" gZR cpuk»p" f g" r" kvgi tcek»p" f g" r" tgi k»p. " c" h" p" f g" cugi wct" uw'f gucttqm "geqp»o leq" { "ulekn0Uw'qdlgvkxq" hpcn'gu" gn' guvdngelo kgpvq" f g" wp" o gtecf q" eqo Ap" r" vlpqco gtlepcq0Uw" cpvgegf gpvgu" f cvp" f g" 3; 82" ewepf q" ug" rji t» "wp" cewgtf q" kpekcn' gpvtg" ukvg" r c" lgu< Cti gpvkc. " Dteukn "Ej krg. " O² zleq. " Retci w{ . " Rgt À" { " Wtwi w{ . " s wg" r gtugi w" f" crecp| ct" wpc" o c{ qt" kvgi tcek»p" geqp»o lec. " c" v'cxz u' f g" r" co r rkecek»p" f gn' co c" o q' f g" uwo" gtecf qu" { " r" gZR cpuk»p" f g" u' eqo gtekq" tge" f" tqeq0Eqp" r quvgtkqtkf cf " ug" vpkgtq" rcu" pcekqpgu" f g" Eqmqo dlc. " Gewcf qt. " Dqrxk" { " Xgpgj wgr0Gp" 3; ; 2. " rqu' I qdltppu" f g" guqu" ppeg" r c" lgu" o qf kkecp" gn' xkq" v'cvf q" { " f gekf gp" t'gchto ct" r" xqnpvcf " r qf" kcu' f g" hqtvcrggt" gn' r tqeguq" f g" kvgi tcek»p. " j cegtq" o " a u" hrgzklng" gp" uw' r rkecek»p. " { " uwetkldgp" gn' pwgxq" V'cvf q" f g" O qpvgxkf gq" *VO /: 2+0" Rquvgtkqto gpvg. " ug" cf j kltgtq" cn' o kuo q" Ewdc" { " Rcpco " 0'Uw'hwpek»p" d" a ulec" gu" r" r tqo qek»p" { " tgi wrcek»p" f gn' eqo gtekq" tge" f" tqeq" f g" rqu' r c" lgu" f g" r" tgi k»p0" ⁹³ "Guv" f gd" f" etgegt" gp" gn' vgo r q. " eqo gp| cpf q" gp" 3; ; 3" r qt" wp" ewvq" f g" 32022" xgj "fwaru" r ctc" ecf c' r c" l. "0" ⁹⁴ "Gpvtg" rcu' o kuo cu' ug' r wgf gp" o gpekqpcr' r' hdtgcrk' cek»p" eqo gtekn' { " hpcpelgtc. " of gutgi wrcek»pö" f g" wpc" co r rlc" i co c' f g" o gtecf qu. " r tkxk' k' cek»p" f g" go r tguu' r Ànrkecu. " tgi " b gpgu" gur gekrgu" f g" r tkxk' k' r ctc" ekgtvqu" ugevq" gu" f gn' r qf gt" geqp»o leq. " gve0" *Dcuwrf q. "4228=P qej vgh "3; ; ; -0"

f g'f lej q't²i ko gp'hwg'pgi qekcf c'f g'pvtq'f g'rc'Eqo kulop'f g'rc'Eqpegtvcekop'r ctc'rc'Tgeqpxgtukop'
 f g'rc'Kof wutlc"Cwqo qvtk . "etgcf c'r qt"gn'i qdkgtpq'f g'O gpgo "gp"3; ; 2"*Gvej go gpf { . "4223+0'
 Ncu'r tkpek'cngu"ectcevgf"jukecu" f gn'T²i ko gp"gtcp<3+"wp"cewgtf q'ucnctkcn'gpvtg"go r tgucltqu" { "
 ukpf kecqu'qtkgpvcf q'c'b qf gtct'hqu'ucnctkqu" { 'dclct'gn'r tgekq'f g'hqu'xgj "fawqu=4+"wp'eqo r tqo kuq"
 r qt"r ctvg" f g"rcu" go r tgucu" f g"kpaxgtvk" r ctc"ewdtk"rc" dtgej c"vgepqn»i kec"eqp"rcu"o gtecf qu"
 kpgtpcekqpcngu=5+"wpc'dcttgc'vctkctk'f gn'52' /ewcpf q'rc'vctkrc'r tqo gf kq'f g'vqf c'rc'geqpqo "f"
 nagi q'f g'rc'tghqto c"eqo gtekn'gtc'f g'crtgf gf qt'f gn'32' /"eqo dkpcf c'eqp"rc'r qukdktkf cf 'r ctc'rc"
 kpf wutlc'vgo kpcn'f g'ko r qtvt'wplcf gu'eqp"wpc'vctkrc'f g'u»m'4' ={"6+"ewr qu'f g'ko r qtvekop"
 eqp"wpc"vcuc" f gn'32' "f g'rc"r tqf weekop"mecn'cpwcn'gp" xgj "fawqu"eqo gtekn'gu"*Gvej go gpf { . "
 4223=Xkncmp. "3; ; + "C"uw'xgl . 'rcu'vgo kpcngu'cwqo qvkegu'gzvcplgtcu'ug'xkgtq'hcxqtgekfcu"
 r qt" rc" Ng{ " f g' kpxgtukqpgu" Gzvcplgtcu" f g' 3; ; 5" *Ng{ " 436: 4+ " rc" ewcn' pq" guvdrge"fc"
 eqpf kekqpc kgpvqu" c" rc" tgo kulop' f g' wnkf cf gu. " vtdwcekop" gur ge"kec" pk' tgr ctkcekop" f g'
 ecr kcn'gu"*Mjuceqhh" { "Rqtvc. "3; ; 9+0"

Gp" guvg" pwxq" gpvtpp" tgi wrcvtkq" tgvtpctqp" f kxgtucu" go r tgucu" vgo kpcngu" s wg" ug"
 j cd"cp"tgvtcf q'f g'rc' Cti gpvpc. "g'kpucnctqp" r rcpvcu'f kwpvcu'eqo r c° "cu" s wg"pq" j cd"cp"vgnk q"
 r tgupekc" r tqf wevxc"gp" gn'r c"ju"eqp"cpvgtkqtkf cf 0'Gp"3; ; 7" Hqtf " { "Xqmny ci gp" tgvgo ctqp" gn'
 eqpvtqn' f g' uwu" hkkrcgu" gp" Cti gpvpc. "cn' f kuqkgtug" Cwqrc'kpc'0' Wp" c° q' f gur w² u' hkpck » "rc"
 gzr gtlgpek' f g' Ugxgn' Cti gpvpc. " { "Ektqup" tgi tgu» cn'r c"ju" r ctc" r tqf wekt' lwpvq' eqp" Rgwi gqv. "gp"
 wpc" hwukop" f g' cncpeg" i mdcn' *RUC" Rgwi gqv/ Ektqup-0' Ej t { ungt" tgvgo » "rc" r tqf weekop" gp"
 Cti gpvpc"gp"3; ; 8. "r ctc" f qu" c° qu' f gur w² u' hwukqpc'ug' eqp" O gtegf gu' Dgp| "gp" qvc' kpgi tcekop"
 f g' ect^a evgt' i mdcn' *F cko ngt" Ej t { ungt-0' Rqt" uw' r ctvg. " I O " xqrk » c" kpucnct" wpc" r rcpvc" r tqr kc"
 vco dkp" gp"3; ; 8. " { "wp" c° q' f gur w² u' T gpcwn' tgewr gt » "gn' eqpvtqn' f g' uw' r tqf weekop" gp" gn'r c"ju"0"

F g'hqto c'uko krc. "gp" guvg' eqpvzq' Vq { qvc' O qvt' Eqtr qtcvqp' kpcwi wt » gn'43' f g'o ct| q"
 f g'3; ; 9" uw' r rcpvc' f g' r tqf weekop" pAo gtq'4; "gp" gn'o wpf q. "rc" ewcn'ug' eqpxk » "gp" rc" r tko gtc"
 kpxgtukop' f g' qtki gp' lcr qp² u' gp' rc' kpf wutlc' cwqo qvtk' f g' Cti gpvpc'0' f g' guvg' o qf q. "rc" go r tguclt"
 kpek » "rc" r tqf weekop" gp' rc' r rcpvc' f g' \ ^a tcvg. " r tqxkpek' f g' Dwgpqu' Ck gu. "eqp" wp' r rcpvgn' f g' o ^a u'
 f g'622' vcdclcf qtgu" *CF GHC. "4239+0' Gp' uw' r tko gt" c° q' cevxc' rc' hto c' hcdtle » "32022' wplcf gu"
 f g' uw' r tqf wevq' rff gt. "rc" r ken'wr "Vq { qvc' J knw0'

Rqt" qvtq" rcf q. "c" o gfkcf qu" f g' rcu" ppxgpc. " gn' o cteq" tgi wrcvtkq" mecn' uwtk » " f qu"
 o qf hkecekqpgu" uki pkkecvkcu' O gfkcpvg' gn' F getgvq' 449: 1; 6" ug" qvqti » "rc" r qukdktkf cf " f g"
 o wnk' rlect" r qt"3.4" c" rcu" gzr qtvekpqpgu" f g' cwqr ctvgu" r ctc" ecrcwrt" rcu" eqo r gpucekqpgu. " { "ug"
 f g'vgo kp » "s wg" rcu" ko r qtvekpqpgu" f g' cwqr ctvgu" qtki kpc'kcu' f gn' O gtequw' ugt"cp" eqpukf gtecf cu"
 pcekqpcngu" gp" gn'e^a rcwq' f gn' eqpvgnk q' ko r qtvcf q' f g' rcu' xgj "fawqu"0' Rqt" qvc' r ctvg. "gn' F getgvq'
 551; 8" f g'vgo kp ». " gpvtg" qvtqu. " wp" gus wgo c" ngxgo gpvg' f getgekpgvg' f gn' o ^a zko q' eqpvgnk q'

ko r qtvf q "f g" mu" xgj f wru" r tqf wekf qu" dclq " mu" dpgghekqu" f gn' t' i ko gp" cwqo qvkl . " { " wp" gus wgo c" cp^a ni q" r ctc" gn' ecuq" f g" nu" cwqr ctvgu" r ctc" s wg" hwgtcp" eqpukf gtcf cu" pcekqpcrgu" *F wrelej 'gv'cri0'4242-0C' p'kxgn'dkrvgtcn'eqp'Dtcukn'eqp'ic'ko r ngo gpwcekp'f gn'Rtqvceqmq'4: 'f gn' CEG'36'gp'gn'c° q'3; ; 8."ug'kpenw{ gtqp'o wej qu'f g" guxu'r tkpek kqu'gp'ic'tgi wcekp'tgi kqpcn'{" ug'cj qpf »" gp"ic'ndgtcrk cekp'f gn'eqo gtekq'dkrvgtcn'co r rkcqf q'gn'ceeguq"cti gpvqp"gp'gn' o gtecf q'f g'Dtcukn' r ctc'kpvgtct" gpo gpf ct'uw'etgekpgv'f²hek'dkrvgtcn'cwqo qvkl "i^a ttkl {" " Rcpki q.'4237-0⁵"

F g" guv" o qf q. "gn'ugi o gpvq" cwqr ctvku" uwtk" wpc" gpqto g'eqo r gvppek" ko r qtvf qtc. " r tqf weq'f g'ic'cr gtwtc'eqo gteknif g'ic'tco c. 'uwu'p'kxgrgu'f g'r tqvgeekp'ghgexxc'p'gi c'vxc⁹⁶" {" ic' cr tgekcekp'eco dktkc0Cu'f' r gug'c'ic'ec'f' cu' r qt'ic'etkuku'f gn'vgs wkr {" ic'f gxcnwcekp'f g'Dtcukn' ic'ko r qtvcekqpgu'f g" cwqr ctvgu" {" ceeguqtku'ug" o wkr rlectqp" r t^a eweko gpv" r qt' ukvg" gpv'g" 3; ; 3 {" gn'4222. 'o gf kf cu'gp'xqno gp. {" r qt'ugku. 'o gf kf cu'gp'xcmt0Gp'vcpv' s wg'ic'r tqf weekp" f g'xgj f wru' r qeq' o^a u' s wg'ug'f w rle »' r ctc'gug' r gt'qf q. 'gn'xqno gp'f g'ko r qtvcekqpgu'f g' r ctvgu" {" ceeguqtku' r qt' xgj f wru' ecuk'ug'f w rlec. 'r cucpf q'f g'w&u30 92" gp'3; ; 3" c'w&u50622" gp'4223" *O qtgtq. "4235-0⁷"

Cuko luo q. "qvtc" f g' ic' r ctvkwrtkf cf gu'f gn' r gt'qf q" hwg' ic' hwgtv" tgi kqpcrk cekp' f gn' eqo gtekq' f gn'ugevq. "eqp" ² phuku'gp'ic'tgncekp' eqo gteknif g' Cti gpvkc'eqp' Dtcukn' s wg' etgek » eqo q' qtki gp'f g'ko r qtvcekqpgu' {" gur gekcm gpv' eqo q' f gukq' f g' ic' g'zr qtvcekqpgu' f g' xgj f wru' *F wrelej 'gv'cri0'4242-0F' g" guv" o qf q. "gn'cwo gpvq' f g' ic' g'zr qtvcekqpgu' f g' xgj f wru' cti gpvqp"

⁹⁵ "Nqu" cur gevqu" o^a u" tgrgxcv'gu' f gn' cevgf q" hwgtqp" eqpf kekqct " ic' r tghgtgpek" ctcpegn'ic' f gn'322' " gp" ic' ko r qtvcekqpgu' f g' xgj f wru' {" cwqr ctvgu' c' s wg' gnu' hwgtcp' eqo r gpucf cu' eqp' g'zr qtvcekqpgu' c' ewens wgt' f gukq. " cur gevq' tgi waf q' r qt' iqu' tgi f b' gpgu' cwqo qvlegu' f g' ecf c' r c' f' u' eqpukf gtct' ic' cwqr ctvgu' f g' qtki gp'f g' ic' eqp' r ctv' eqo q' pcekqpcrgu' r ctc' gn' ^a rwnq' f gn' eqp' vpkf q' o' f' p'ko q' hqecni' g' ki kf q' r qt' ic' tgi wcekqpgu' f g' ecf c' r c' f' u' f' vgtvto k' p'ct' wpc' ewq' f g' ko r qtvcekp' r' dkt' g' f' g' c' t' c' p' egn' u' w' r' ngo gpvctk' {" ukp' eqo r gpuccekp' r ctc' ic' Cti gpvkc' gp' gn' o' gtecf q' f' g' Dtcukn' f' g' : 7022' xgj f wru' r ctc' uwdupct' gn' f² hek' dkrvgtcn' cwqo qvkl " cti gpvqp = {" guwdrgegt' ewq' cu' r' dkt' gu' f' g' c' t' c' p' egn' cf' kekqpcrgu' gp' co dqu' o' gtecf q' f' g' ko r qtvcekp. " f' gukq' cf' cu' c' ic' nu' go r t' g' u' v' g' to' k' p' c' r' g' u' t' cf' k' ecf' cu' gp' " w' p' q' u' q' f' g' i' qu' u' q' e' k' u' " i^a ttkl {" " Rcpki q. "4237-0'

⁹⁶ "Ecpvctgnc'gv'cri0'422: +gu'ko cp' s wg' qu'ek'cdc' gpv'g' wp'4' " r ctc' eqp' w' v' qu' {" ukngo cu. " j' cu' v' w' p' k' x' gn' f' g' /45.72' " r ctc' eqp' k' p' v' gu. " /43.52' " r ctc' i' w' v' cu' {" /39.72' " r ctc' c' p' k' m' u' u' k' p' e' t' p' k' f' cf' qu. " o' c' p' v' p' k' p' f' q' p' k' x' g' n' u' gp' " v' q' t' p' q' c' n' i' / ; " " r ctc' f' k' u' e' q' u' f' g' h' g' p' q. " ukngo cu' f' g' gu' e' c' r' g. " eco r c' p' c' u' f' g' h' g' p' q' {" gn' u' w' e' q' u' {" p' k' x' g' n' u' gp' " v' q' t' p' q' c' n' i' /6' " r ctc' p' g' w' o' " k' e' q' u' {" r' c' t' c' i' q' r' g' u' }

⁹⁷ "Gu' ko r qtvcpv' f' gu' ce'ct' s' wg' f' w' c' p' v' g' v' q' f' c' ic' f² ecf c. {" gur gekcm gpv' c' r' ctvkl' f' g' 3; ; 8. f' luo k' w' »' ic' r' tqf weekp' pcekqpcn' f' g' o' qvqtgu. " j' cu' v' uw' x' k' w' c' n' f' gu' e' r' c' t' k' e' k' p' " *Ue' j' x' c' t' | g' t' g' v' c' r' i' 0' " 4225-0' C' uw' x' g' l. " ic' nu' cwqr ctvku' u' q' d' t' g' x' k' l' g' p' v' g' u' c' gu' v' k' p' x' c' u' k' p' " ko r qtvf qtc' f' g' d' l' g' t' q' p' c' v' t' c' x' g' u' c' t' " w' p' " h' w' g' t' v' g' " r' t' q' e' g' u' q' " f' g' t' g' e' q' p' x' g' t' u' k' p' " r' tqf wekx' {" c' a' c' t' h' i' n' g' " u' p' " v' g' e' p' q' n' i' l' e' q' " s' w' g' " ko r r' l' e' »' w' p' " f' k' u' r' c' t' " r' t' q' e' g' u' q' " f' g' f' g' u' c' t' t' q' m' q' " f' g' " eqo r gvpcku. " h' w' p' c' o' g' p' v' c' m' g' p' v' g' ko r w' u' c' f' q' r' q' t' ic' u' g' z' k' i' g' p' e' k' u' f' g' ic' u' v' g' t' o' k' p' c' r' g' u' 0' C' u' f' " u' g' z' v' g' p' f' k' o' g' n' i' r' t' q' f' w' e' k' t' " e' q' p' " g' u' v' p' f' c' t' g' u' e' g' t' v' k' e' c' f' q' u' f' g' e' c' r' k' f' c' f. " {" ic' " k' p' t' q' f' w' e' e' k' p' " f' g' " e' c' o' d' k' u' " gp' " o' c' v' g' t' k' " q' t' i' c' p' k' c' e' k' q' p' c' n' i' {" f' g' " i' g' u' k' p' . " ic' " r' t' q' h' g' u' k' p' c' r' k' c' e' k' p' " f' g' " n' u' " p' k' x' g' n' u' u' w' r' g' t' q' t' g' u. " ic' " t' g' k' p' i' g' p' l' e' t' " f' g' " r' t' q' e' g' u' q' " c' f' o' k' p' k' u' t' c' v' k' x' q' u. " {" ic' " f' k' h' u' k' p' " f' g' " ic' " r' r' c' p' k' h' e' c' e' k' p' " g' u' t' c' v' i' l' e' c' o' " U' g' c' d' c' p' f' q' p' c' t' q' p' " r' t' q' i' t' g' u' k' c' o' g' p' v' g' " n' u' " g' u' h' w' g' t' " q' u' " f' g' " f' g' u' c' t' t' q' m' q' " f' g' " r' t' q' f' w' e' v' q' u. " r' t' g' f' q' o' k' p' c' p' f' q' " ic' " g' u' r' g' e' k' h' e' c' e' k' p' " f' g' " e' c' t' e' v' g' t' " i' n' l' e' c' u' " {" r' r' c' p' q' u' f' k' t' g' e' c' o' g' p' v' g' " f' g' u' f' g' ic' u' v' g' t' o' k' p' c' r' g' u' 0' C' u' f' " g' u' s' w' g. " gp' " o' c' v' g' t' k' " f' g' " f' k' u' g' " q' " f' g' " r' t' q' f' w' e' v' q' u. " ic' u' cwqr ctvku' v' c' p' u' k' c' t' q' p' w' u' g' p' f' g' t' q' f' g' r' t' f' k' c' f' g' ic' u' e' c' r' c' e' k' f' c' f' g' u' v' e' p' q' n' i' l' e' c' u' s' w' g' j' c' d' f' c' p' f' g' u' c' t' t' q' m' f' q' f' e' c' f' c' u' c' t' u' 0' U' k' p' " go d' c' t' i' q. " gp' " o' c' v' g' t' k' " f' g' " r' t' q' e' g' u' q' u. " q' t' i' c' p' k' c' e' k' p' " {" i' g' u' k' p' " f' g' " ic' " r' t' q' f' w' e' e' k' p' . " ic' " ko r qtvcekp' " f' g' " ic' u' e' c' r' c' e' k' f' c' f' g' u' v' e' p' q' n' i' l' e' c' u' o' c' p' w' x' q' u' w' ko r q' t' v' c' p' e' k. " u' q' d' t' g' v' q' f' q' r' q' t' ic' " p' g' e' g' u' k' f' c' f' " f' g' t' g' f' w' e' k' " e' q' u' q' u' r' c' t' c' " c' h' t' q' p' v' c' t' " ic' " eqo r gvpcku' g' z' v' g' t' p' c' " O' qtgtq. "4235-0'

r gto kx» "wpc"ucrkf c"gzr qtvcf qtc"ht gpvg"cn'gucpeco kgpvq"r tqf wevxq" f g"rc" f² ecf c" f gn'ø 2. "c"rc" xgl "s wg" f kq" wpc"t gur wguv" c"wp" r tqdrgo c"ugevqtken's wg" rqu" f kxkpvqu" i qdkgtpqu" f guf g" hkpgu" f g" 3; 82" j cd" fcp" kpvpgvf q" cdqtf ct0' Ukp" go dcti q." rc" tgi kqpcnk cex»p" f gn' eqo gtekq" { "rcu" "" o qf hkecekqpgu" f g" guc" gvr c" f kgtqp" eqo q" tguwxf q" hpcn'wp" etgekpgv" f² hlek" eqo gtekn' f g"rc" kpf wutkc" cwqo qvtk . 'b qvtk cf q" vcpvq" r qt' gn'eqo gtekq" eqp' Dtcukr' eqo q" eqp' gn' guv" f gn' b wpf q." gp" gn' ewcn' wxq" wp" ko r qt vcpvq" r cr gn'rc" etgekpgv" ko r qt vcel»p" f g" cwqr ct vgu" *Rgtg| "Cm cpuk" 4243+0"

C"uw"xgl . "f wcpvg"rc" f² ecf c" f g"3; ; 2"rc" kpf wutkc" cwqo qvtk "cvtcxgu»" wp" r tqeguq" f g" hwgtv" tgeqpxgtuk»p" r tqf wevx" { "vgepqn» i kec0' C" r ctvt" f g"rc" ko r qt vcpvq" qrc" f g" kpxgtukqpgu" gztcp' lgtcu" s wg" ko r r'lectqp" gn' tgvqtpp" { "rc" mgi cf c" f g" vto kpcrgu" cwqo qvtkegu. "ug" mxx» "c" ecdq" wpc" o qf gtpk cex»p" vgepqn» i kec" f gn'ugevqt. "m" ewcn' j cd" f" tgr tguvpgvf q" wp" r tqdrgo c" gwt wewt cn' f g"rc" tco c" gp" rcu" gvr cu" r tgxkcu0' Cn' t gur gevq. "ug" o qf gtpk ctqp" rqu" f kug" qu" f g" r tqf wevq. "ug" ko r ngo gp»" r ctekm gpv" rc" qti cpk cex»p" *flexible* f g" rc" r tqf week»p." { "ug" cj qpf ctqp" rqu" eqpvtqrgu" f g" eckf cf . "gpvtg" qvtqu" eco dkqu" *F wrelej "gv" cn0" 4242+0' Guvqu" r tqeguqu" ug" dductqp" gugpekmo gpv" gp" rc" cf qr ek»p" f g" vgepqn» i f" f gucttqmf c" gp" rcu" ecucu" o cvkegu" *O qtgtq. "4235+0" ""

C" r ctvt" f g"rc" etluku" f gn' uwf guv" cul² vlek" f g"3; ; : { "rc" f gxcn» cex»p" f g"3; ; ; " f g" Dtcukn" Cti gp' vpc" go r gl » "c" gpeqvtct" f hkewxf gu" gp" rc" qdvgep»p" f g" hkp» cex»p" gztvtpc" { . "eqp" gn' tgewtuq" f g" rcu" r tkxv k cex»p" gu" ci qvcf q. "gn' t" f k' q" t² i ko gp" f g"rc" eqpxgt vdkk' cf "ug" vqr » "eqp" uwu" rko kcekqpgu" j cuv" f gugo dject" gp" wpc" ci wf c" etluku" geqp» o kec" c" hkpgu" f g" 4223. "rc" ewcn' ko r rle»" wpc" ec" f c" f gn' RKD" f gn' qtf gp" f gn' 47' "gp" vgu" c" qu" { "pkxgrgu" f g" f gugo r rgg" { "r qdtgl c" s wg" tqpf cdcp' gn' 47' " { '72' . t gur gevxc" gpvg. hpcnk' cpf q" eqp' rc" ec" f c" f gn' qdkgtpq" f g' Nc' Crcp| c⁹⁸" { "f cpf q" eqo kgp| q" c" wpc" pwx" c" gvr c" gp" rc" j kuvtkc" geqp» o kec" cti gp' vpc0"

2.2 - La industria automotriz luego de la crisis de la convertibilidad

2.2.1 – La etapa de la posconvertibilidad (2002-2015)

C" r guct" f gn' ghgev" g" zr cpukxq" s wg" wxkgtqp" rqu" cewgtf qu" t gi kqpcrgu" uqdtg" rc" kpf wutkc" cwqo qvtk . "f wcpvg" rqu" Anko qu" c" qu" f gn' r gt" f qf q" cpvgtkqt" ug" t gi kuvctqp" ko r qt vcpvq" ec" f cu" gp" rc" r tqf week»p. "gzr qt vcel»p" { "xgpvcu" kpvgtpcu" f g" xgi f" wqu" gp" gn' b cteq" f g" rc" tgegu»p" geqp» o kec0' Cu" f" c" tc" f" f g" guc" ukwcel»p. "gp" rc" Ewo dtg" f g" Hqt kcp» r qrku" f g" f lekgo dtg" f gn' 4222. "rqu" r c" f" gu" o lgo dtqu" f gn' O gtequw" uwuetkdkgtqp" rc" F geku»p" P Å 92 122. "cr tqdcpf q" gn' Cewgtf q" uqdtg"

⁹⁸ Gn' h' gpvg" r qu" f" eq/ r ctvf ctkq" òNc" Crcp| c" r ctc" gn' Vtcdclq. "rc" Lwvlek" { "rc" Gf wecel»pö. "eqpkelc" c" uko r ngo gpvg" eqo q" òNc" Crcp| cö. "hwg" wpc" eqcile»p" r qu" f" lec" gpvtg" rc" Wpk»p" E" k' lec" Tcf lecn' *WET+ { "rc" crkcp| c" H' gpvg" Rc" f" Uqrf ctkq" *H' gr cuq+ "eqphqto cf c" gp"3; ; 9" gp" rc" Cti gp' vpc. "s wg" i cp» "rcu" grgeekqpgu" f g"3; ; ; 0'

Rqfllkcc" Cwqo qvkl " f gn' O gtequwt " *RCO + " tguwncf q" f g" kpvpu" pgi qekcekppgu" gpv g" gn' i qdkgtpq" { " rnu" e^a o ctcu" go r tguclkrngu' Uwu" qdlgkxqu" gtcp" guvdrgegt" rnu" dcugu" r ctc" r" kpuvwtcek>p" f g"wp'hkdtg'eqo gtekq'r ctc"nqu'dkpgu'cwqo qvtegu'gp"gn'dmqs wg."cu'leqo q'vco dk p" etgct" eqpf kekppgu" hcxqctdrgu" r ctc" gn' f gucltqm" f g" wpc" r rncvhtqto c" tgi kqpcn' kpvgi tcf c" { " eqo r gvkkxc."eqp'ecr cekf cf "f g"gzr qt wcek>p" c"vgtgqtu'o gtecf qu0"

C"r ctvkt "f gn'cewgtf q"ug"hl>"gp"57' "gn'ctcpegn'c"nqu'xgj f'wqu'r tqf wkl qu"hwgtc" f gn' O gtequwt0Cf go ^a u."r ctc'ugt"eqpukf gtecf qu'eqo q'xgj f'wqu'tgi kqpcrgu'ug"guvdrge" s wg"gn'82' " f g"2 uvqu'ugcp" f g"eqpvpkf q"tgi kqpcn"eqpvgo r rcpf q"wp"52' "gp"Cti gpvkc" { "gn'vqtq"52' "gp" Dtcukn" *F getgvq"8824222+0C"uw'xgj . 'r ctc"rnu'cwqr ctvqu'pq"r tqf wkl cu'gp"r"tgi k>p"ug"hlcdc" wp'ctcpegn'f gn'4' " b kpvtcu's wg'r ctc"rnu'hcdtklcf cu'f gpvq'f gn'dmqs wg'xctkcdcp"gpv g"36" { "3: ' . " f g"o qf q" s wg" guvcu' Anko cu'r qug'fcp" o c { qt" r tqvgeek>p" eqo gtekn' *F getgvq"8824222+0" Rqt" Anko q. 'ug'hlcdc"wp'f'f' k'g'eqo r gpucl q'f g'kpvgteco dk'ugevqtkn'leqp"Dtcukn'f gpqo kpcf q'ohngzö." s wg"ko r rkecdc"s wg'r qt'ecf c" f »rct" f g'dkpgu'cwqo qvtegu"s wg"gzr qt vctc"Cti gpvkc" c"Dtcukn'gp" 4223'r qf t'f'ko r qt vct'f'guf g'2 uv'wp'o ^a zko q'f g'w&u.327'hkdtg'f g'ctcpegrnu'0Guvu'f kur qukekppgu" hwgtq'f g'i tcp'ko r qt vpekc'r ctc"r" kpf wutk" { "o ctect^a p"r" f k^a o lec" f gn'eqo gtekq"gz vgtkqt" f gn' ugevq'cwqo qvqt'eqp"Dtcukn'f wtcpvg'nqu" c^o qu'uki wkpvgu0"

F g" guv"o qf q."mgi q" f g"xctkqu" c^o qu'f g"tgeguk>p"geqp>o kec" { "go r gqtcu kpvq" f g"nqu" kpf kec'f qt gu"uqekrgu."ug"r tqf wq" r" etkuku" f g" hpcrgu" f g"4223." g { gevcpf q" cn' i qdkgtpq" f g" Nc" Cnkcp | c0" C" r ctvkt " f g" f lej q" xce"q" f g" r qf gt." ug" uwegf kgtq" f kpvqu" r tgucl' gpvgu"⁹⁹" j cuvc" eqpuqrf ctug'Gf wctf q'F vj crf g."f gn'Rctvkf q'Lvulekcnkuc."cn'ht gpvg'f gn'Rqf gt'Glgewkxq'P cekqpcn' *RGP +0Guv'Anko q'ngx>" c'ecdq'wpc'ugt'g'f g'r qfllkccu's wg'ug'guvcdcp'ct vewrpf q'gpv g'f kpvqu" cevqt gu'upf kecrgu."go r tguclkrngu" { "r qfllkccu" { "s wg'ug'egpvcdcp"gp"rnu'et'fllkccu'cn'o qf gmq' f g"r" eqpxgt vdkkcf cf { "rnu'hqto cu'f g'tgevcxct"r"geqpqo f⁹: *Qtvkl " { "Uej qtt."4229+0"

Gp" guv"o cteq"ug" guvdrgekl>" gn'53'An' Rtqvqeqm" Cf kekqpcn'f gn'CEG" gpv g"Cti gpvkc" { " Dtcukn' Gp" ² n' ug" eqphqto >> "wp" pvgxq" xcrqt" r tqvqeqrct" f gn' hngz." gp" gn' ewcn' ug" gz vgpf k>" ci tguclxco gpvg'gn'o cti gp'f g'ko r qt vcekppgu'r gto kkl cu.'r cucpf q'gp"4224"cn'4=4225"cn'4.4=4226" cn'4.6=4227"cn'4.8."eqp"r"uwr wguv'mgi cf c"gp"4228" f gn'kdtg'eqo gtekq'0Guvq's wkg'g'f gek' s wg"

⁹⁹"Gn'42'f g'f kelgo dtg'f g'4223"gn'r tgucl' gpvg'Hgtpcpf q'f g'rc" T Åc'tgpwpek'c'lw'ecti q" { "cuwo g'ug'gn'r tgucl' gpvg'f g'rc" E^a o ctc" f g" Ugpfcf qtgu."Tco >>p" Rvgtc0' Gn'f f⁹"45" cuwo f⁹"r" r tgucl' gpek" Cf qrhq" Tqf t'f' wgl " Uc^a ." f gn' Rctvkf q' Lvulekcnkuc0Gn'52'f g'guv'o gu'ug'j k' q'ecti q'f gn'Rqf gt'Glgewkxq'gn'r tgucl' gpvg'f g'rc'E^a o ctc'f g'F kr wcf qu'Gf wctf q' Eco c^o q'0Hlpcm gpvg."gn'3'f g'gpgtq'f g'4224'cuwo k>"r" tgucl' gpek'kpvgtkpc'gn'gzi qdgtpcf qt" { "ugpcf qt'dqpcgtgpug" Gf wctf q'F vj crf g'f gn'Rctvkf q'Lvulekcnkuc0"

⁹: "Gp"guv'ci twr co kpvq'ug'f guvcecdc"r"r ctvlekr cek>p" f g"r" Wplop'kpf wutk'niCti gpvkc" *WC+."r" ewcn'gpctdqre" r"r" tqr wguv'f g'wp'bo qf gmq'f gn'f >rct"cnqo'eqp"r" xki gpek'f g'wp'ovr q'f g'eco dk'tgcrl'eqo r gvkkxq" { "guvdrge" { "wp" qtf gp'bo cetqgeqp>o leq'guvdrge0F lej q'r tq' gevq'ug'qr qp'f'c"q'vq'f g'r tqhw'p'f k' cek>p'f gn'2' i ko gp'eqpxgt vdk'g'j cek" r" f qnctk' cek>p" f g"r" geqpqo f⁹"ko r wncf q" r qt" gn'ugevq't" hpcpekg'q" nqecn' g" kpvgt'pcekqpcn' { "r qt" rnu" go r tgucl' r tkxck' cf cu'gz vctplgtcu" *F quuk'423; =Qtvkl " { "Uej qtt."4229+0"

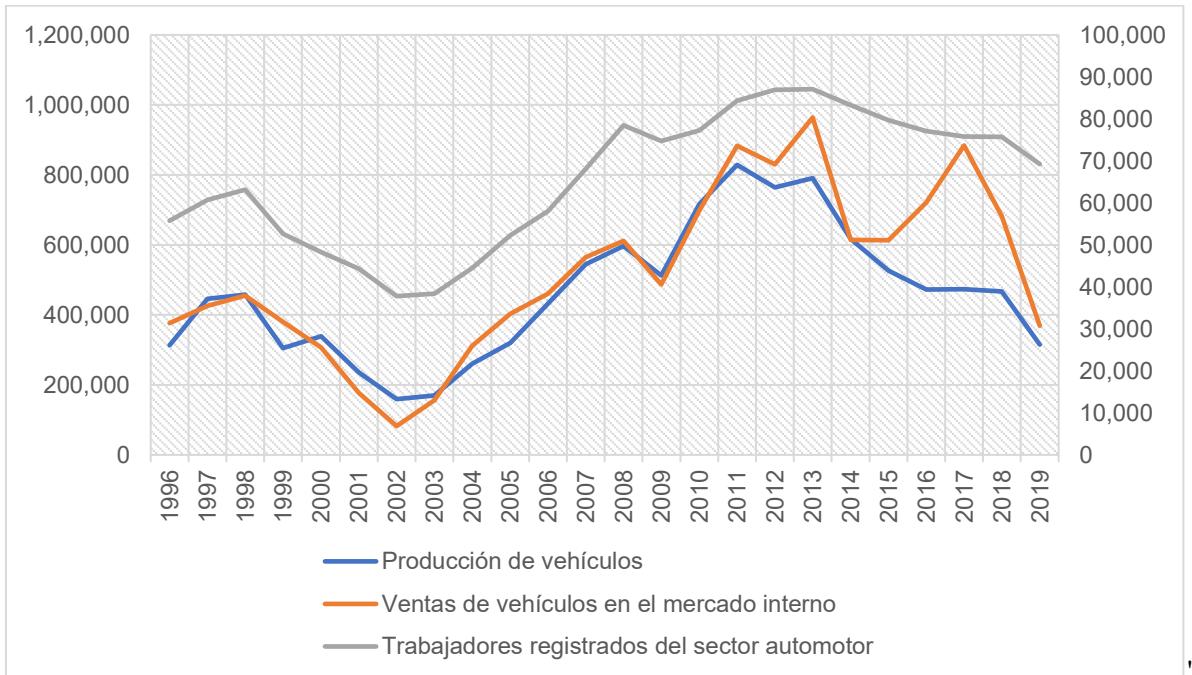
gp"4224"r qt"ecf c" f » nct" f g" g z r q t v e k » p" s w g" t g c r k l c d c" w p q" f g" g u v q u" f q u" r c" f l u g u" c" u w" x g e k p q. " u g" r g t o k" f c" g n f q d r g" f g" k o r q t v e k » p" f g u f g" g n l q v t q 0' : " C" u w" x g l . " u g" k o r w u q" s w g" g n e q p v g p k f q" m e c n f g" c w q r c t v u" h w g t c" o g f k f q" e q o q" o ^a z k o q" k o r q t v c f q" : ² r c u c p f q" g n i o k u o q" f g" 72' " g p" 4224" c" 87' " g p" 42270" U k' d l g p" g u v g" t ² i k o g p" k o r n e c d c" w p" 57' " f g" e q p v g p k f q" m e c n' c t i g p v k p q. " E c p v c t g m c" { " q v t q u" * 4239 + " u q u k g p g p" s w g" r e" t g i m o g p v e k » p" h w g" u w o c o g p v g" e q o r n e c f c" r q t" m q" e w c n' p w p e c" u g" t g c r k l » " g h g e v k x c o g p v g" u w" e q p v t q n" c f g o ^a u" f g" j c d g t" g p h t g p v c f q" w p c" h w g t v g" q r q u l e k » p" f g" r c" k p f w u t k c" v g t o k p c n' c" u w" c r n e c e k » p. " k o r n e c p f q" w p" f g u w u q" f g" m u" t g s w k u k q u" f g" e q p v g p k f q" m e c n' o " p l o q" f g" m u" x g j " f e w r u 0' C" u w" x g l . " g p" 4224" u g" o q f k h e » " g n' c e w g t f q" e q o g t e k c n' r c t c" g n' u g e v t" c w q o q v t" f g n i O g t e q u w" e q p" E j k r g" * C E G" 57 + { " u g" h k t o » " w p q" p w g x q" e q p" O ² z l e q" * C E G" 77 + 0'

Cf go ^a u. " f w t c p v g" g u v c" i g u k » p" u g" m g x » " c" e c d q" q v t c" t g h q t o c" e g p v c n' g p o c t e c f c" g p" r c" r q n' m e c" f g" e q o g t e k q" g z v g t k q t. " r c" o q f k h e c e k » p" f g n' T ² i k o g p" f g" C f o k u k » p" V g o r q t c t k c" g u v c d r g e k f q" g p" 3 ; ; . : " s w g" j c d k k x c d c" r c" k o r q t v e k » p" v g o r q t c t k c" f g" o g t e c f g t " f u" f g u k p c f c u" c n' r g t h g e e k q p c o k p v q" k p f w u t k c n" g z k o k g p f q" c" ² u c u" f g n' r c i q" f g" c t c p e g r u" e q p" r e" e q p v c r c t v k c" f g" r c" g z r q t v e k » p" f g n' r t q f w e v q" h k p c n' O' G n' e c o d l q" e q p u k u k » " g p" g n' g u v c d r g e k o k p v q" f g n' T ² i k o g p" f g" C f w p c" g p" H e v t q" f c" * T C H + * F g e t g v q" 8 : : 4224 + . " s w g" k o r n e » " w p c" u k o r n h e c e k » p" { " c o r n e c e k » p" c n' u k u r g o c" f g" C f o k u k » p" V g o r q t c t k c" r c t c" g n' u g e v t" c w q o q v t. " r g t o k k g p f q" s w g" m u" k p u w o q u" k o r q t v c f q u" k p i t g u g p" g p" g n' r c" f u" u k p" c t c p e g r u" { " s w g" g u g" e q u v q" u g" r c i w g" u » m q" e w c p f q" r e u" w p k f c f g u" u g c p" x g p f k f c u" c n' e q p e g u k q p c t k q" m e c n' O' F g" g u v g" o q f q. " u g" c d c t c w d c" r c" k o r q t v e k » p" f g" r c t v u" { " r k g l c u" w k n k c f c u" r c t c" r c" g z r q t v e k » p" f g" x g j " f e w r u" v g t o k p c f q u 0'

Gp"4225. " P ² u v q t" M k e j p g t. " v o d l e p" f g n i R c t v k f q" L w u k e k r k u c. " c u w o k » e q o q" r t g u l f g p v g" f g" r c" p c e k » p. " { " ² u g. " c" i t c p f g u" t c u i q u. " e q p v k p w » " g n' g u s w g o c" g e q p » o l e q" r t g x k q. " e g p v c f q" g p" g n' o c p v g p k o k p v q" f g n' o f » n c t" c n q o. " c" r c" x g l " s w g" e q p u g t x » " c" T q d g t v q" N c x c i p c" g p" r c" e c t v g t c" g e q p » o l e c. " s w k e p" { " c" j" c d" f c" e q u g e j c f q" f k u k p v u" m i t q u" c" r c t v k t" f g n' o c p g l q" f g" r c" e t k u k u" * M w r h c u. " 4238 + 0' V t c u" r c" t g e g u k » p" g e q p » o l e c" { " r t q f w e v k c. " g p" 4225" g u v c" v g p f g p e k c" e q o g p l » " c" e c o d k c t" { " g n' e k e m q" g e q p » o l e q" t g d q v » O' G p" g n' u g e v t" c w q o q v t" r c" r t q f w e e k » p" { " r e u" x g p v c u" g p" g n' o g t e c f q" k p v g t p q" { " g z v g t p q" u g" h w g t q p" t g e q o r q p k g p f q" t ^a r k f c o g p v g : ³ * x g t" I t ^a h e q" K K 3 + 0'

⁹: "Culo kuo q. "ug" f gyto k » "w" x c m t" r t q v e q n c t" f g n l m g z" t g v t q u r g e v k x q" c" 4223" r c u' p f q m q" f g" 3.327" c" 3.8. " g x k e p f q" s w g" r e u" g o r t g u c u" s w g" e w o g p v c d e p" k o r q t v e k q p g u" g p" D t c u k i f g u f g" C t i g p v k p c" h w g t e p" u c p e k q p c f c u 0' : ² " C" r c t v k t" f g" r c" F g e k u k » p" 92 4222" f g" r c" R q i f l e c" C w q o q v t k l " f g n' O g t e q u w" g n' e q p v g p k f q" m e c n' f g" c w q r c t v u" u g" e q o g p l » " c" e q p v c d k k l c t" e q o q" 3 + " u q d t g" g n' r t g e k q" f g" r e u" r k g l c u" k o r q t v c f c u" q" 4 + " u q d t g" g n' x c m t" f g n' d l g p" h k p c n' { " p q" u q d t g" r e u" r k g l c u 0' C" u w" x g l . " u g" g u v c d r g e g" s w g" v q f q" e q p l w p v q" q" u w d e q p l w p v q" s w g" k p e q t r q t g" e q o q" o " p l o q" w p" 89.7' " f g" c w q r c t v u" p c e k q p c r g u" g u" p c e k q p c n' { " r q t" v c p v q" u g" e q p u k f g t c" g n' 322' " f g" u w" x c m t" c" g h g e v q u" f g" r c" o g f k e k » p 0' : ³ Ugi Ap' g n' g z r t g u l f g p v g" f g" w p c" v g t o k p c n' o d e s p u e s d e l a c r i s i s d e l 2002, c o n l a f u e r t e d e v a l u a c i o n y c o n l o s p r e c i o s d e l a s t a r i f a s c o n g e l a d o s, A r g e n t i n a f u e t r e m e n d a m e n t e c o m p e t i t i v a. N o t a n t o p o r p r o d u c t i v i d a d, s i n o p o r e l b a j o c o s t o l a b o r a l, d e l a e n e r g i a y d e l o s s e r v i c i o s, q u e e r a u n c a p i t a l q u e A r g e n t i n a t e n i a a c u m u l a d o d e s d e e l c i c l o a n t e r i o r. Y e s e p e r i o d o g e n e r o u n a u g e p o r l o s b u e n o s c o s t o s y u n a c a p a c i d a d d e e x p o r t a r " * g z r t g u l f g p v g" f g" v g t o k p c n' c w q o q v t k l . " g p v t g x k u c" v g r h » p l e c. " 46 127 423 ; + 0'

Gráfico II-1 - Producción y ventas en el mercado interno de vehículos (unidades) (eje izquierdo) y empleo registrado en el sector automotor (promedios anuales) (eje derecho) (1996-2019)



Hwpgv-gndqtcek»p'r tqr kc'gp'dcug'c'CF GHC.'CECTC'{'QGF G0'

Gp"4227"ug'tgcrk ctqp"cewgtf qu'f g'eqo r ngo gpwck»p'f gr'O gtequw"eqp"RgtÀ*CCRÆG" 7: +{"eqp"rc"Eqo wpkf cf "Cpf kpc"*ECP +s wg'eqo r tgp'f'c"Gewcf qt."Eqmo dlc"{"Xgpgl wgr" *CCRÆG7; +0Gp"4228"ug'mgx»"c'ecdq'wp'pwxq'cewgtf q'dkrvgtcn'gptg'Cti gp'kpc"{"Dtcukl'gp' gr'ewcn'ug'tgf wq'gr'o a zko q'f gr'ngz"fg"4.82"c"3.; 7."xcmr"s wg'ug'o cpwxq"j cuvc"gr'42360⁴" Cf go a u.'f wcpvg'f lej qu'c° qu'ug'mgxctqp"c'ecdq'qvcu'r q'f'lecu'ko r qtvcpgu'r ctc'gr'lugevqt0Cu" gr'ugetgvctkq'f g" kpf wutk" f kug° »" wp" r rcp" f g" kpxgtukppgu.⁵" ko r wucpf q" rc" uwukwck»p' f g" cwqr ctvgu'ko r qtvcf cu'r qt'qvcu'f g'r tqf week»p'pcekqpcn'qvqti cpf q'c'rcu'vgo kpcrgu'wp'tgkpgi tq' f g': " ⁶uqdtg'hu'eqo r rppgvu'ko r qtvcf qu's wg'eco dkgp'r qt'pcekqpcrgu' ⁷*F getgvq'9964227-0"

Cuko luo q."ug'f kur wuq"s wg'gr'hueq'tgkpgi tg"gp'ewqvcu'c"rcu'cwqo qv'legu'rcu'f gw'cu' cewo wrcf cu'r qt'gr'Rrcp'Ecplg'rcp' cf q'f wcpvg'gr'i qdkgtpq'f g'Nc'Crkcp' c0C'uw'xg' ."gr'Dcpeq" P cek»p'{'CF GHC'ugmctqp'wp'eqpxgpkq'f g'eqqr gtcek»p'go r tguclkn'ò gf kcpvg'gr'ewcn'rc'gp'kf cf " hpcpekgtc"qhckn'r qp'c'c'f kur quck»p'f g'rcu'f kl' "vgo kpcrgu'cwqo qv'legu'vq'cu'rcu'f'p'p'gcu'f g"

⁴"Gp'gug'pwxq'cewgtf q'pq'j wq'k'p'vq'cni wq'r'qt'vcvt'f g'tgewr gtct'gr'ng'w'k'q'f g'eqp'v'k'q'f'q'ecn'r'qt'hu'ewcn' g'ug'vgo c'pq'xq'k'c'c'vcvtug'gp'gr'lugevqt'cwqo qv'q'{"s wgf »"xki gpvg'gr'o a zko q'ko r qtvcf q'f gr'87' ."cwps wg'uw' eqp'q'gr'g'c'p'wq'{"gr'vgo c's wgf »"r'f' ev'eco gp'vg'gz'k'p'q' *Ecpvctgmc'gv'c'f'4239-0

⁵"F gpqo kpc'q'T²i ko gp'f g'f'p'egp'k'x'q'c'rc'Eqo r g'k'k'f'cf'f'g'rcu'c'wqr ctvgu'Nqecrgu' *F getgvq'9964227-0'

⁶"Nwgi q'f g'uegpf gp'vg'gp'gr'vgo r q0

⁷"Ugi Àp'Ecpvctgmc'{"q'v'cu'4239-2436+." "se tardó unos dos años en reglamentar esta norma y todavía no se ha desembolsado el reintegro a ninguno de los beneficiarios, con lo cual su efectividad ha sido escasa hasta el presente (2017)".

et² f kq'f gukpcf cu'cnf gucttqm'f g'rc'r tqf week»p0Rqt'qtq'rc'f q.'rc'tgcevxcel»p'f g'rc'r tqf week»p" i gpgt»'rc'r wguv'gp'o ctej c'f g'wpc'qrc'f g'lpaxgtukppgu'f g'r ctvg'f g'rc'u'vgt o kpcrgu.'s wg'cugpf'fcp" c'w&u30422"o kmppgu."c'glgewct'j cuvc"422; "25 127 14228."Gn'Etqpkuc+0'Gp"422: "hwg'cr tqdcf c" wpc'pwgxc'rg'f' g'kpegpvxq'cnlugevt'cwqr ct'vuc'pcelqpcn*Ng{ '480; 5+'s wg.'o gf kcpvg'gu'f'p wru" ko r qukkxqu.'ko r wucdc'c'rc'u'vgt o kpcrgu'c'wkk' ct'r ctvgt'f' "eqo r qppgvu'r tqf welf qu'gp'gnr' c'f'u0⁸" Ukp'go dcti q.'qu'ghgevqu'f g'f lej c'ngi kurek»p'pq'wvktq'p'wp'ko r cevq'tgrxcpvg'gp'rc'tgf week»p" f gnif² hlek'ugevtkcn'R²tg| 'Ct'lec."423; +0'

Gp"422; . 'c'tc'f' 'f g'rc'etkuku'geqp»o lec'kpvtpcelqpcn'f g'rc'etgekpgv'hwic'f g'ecr kcrqu'f' " f gn'eqo kgp| q'f gn'f gvtkqtq'f g'qu'tguwncf qu'f g'rc'ewgpc'eqtkgpvg'f g'rc'dcrp| c'f g'r ci qu.'ug" i gpgtctq'f kmpcu"twr wtcu"gp"gn'r rcpq"geqp»o leq'f' " r qn'leq"cti gpvqp" *Dcuwrf q."4233= Dcuwrf q'f' "O cp| cpgnk'4238=I ci i gtq'gv'cr0'4237=Mwrcu."4238+0'Gp'gnlugevt'cwqo qvt.'guv" ko r rlc»"ec'f' cu'gp'rc'r tqf week»p" { "xgpvc'kpvtpcu" { "gzvtpcu"*xgt" I t^a hlequ'KK3" { "KK4+"ukp" go dcti q.'c'kpgu'f g'gug'c° q'qu'ghgevqu'f g'rc'etkuku'eqo gp| ctq'c'f glctug'cv^a u0C'r ct'k'f' g'gug" o qo gpvq.'gp'dcug'c'rc'u'r qn'lecu'f g'gu'f'p wru'f g'rc'f go cpf c'kpvtpc'f' "f gn'etgelo kpvq'f g'Dtcukn' { "rc'xcmktk cel»p'f g'uw'o qpgf c."eqo gp| »"wp'ugi wpf q'ekrq'f g'cwi g'f g'rc'kpf wvkc's wg'f wt»" wpu'r qequ'c° qu0""

Nwgi q'f g'rc'tgggeek»p'f g'Etukupc'Hgtp^a pf gl' "f g'Mktej pgt" gp"4233. "qu'r tqdrgo cu" f gtxcf qu'f g'rc'gucug| "f g'f kxkuc."gpo ctecf qu'gp"gn'j ku»tleq"r tqdrgo c'f g'rc'*restricción externa*"cti gpvpc.'ug'ci wf k' ctq'c'tc'f' "f gn'cwo gpvq'f g'rc'hwic'f g'ecr kcrqu'f g'4233.'gnif² hlek' gpgti² vlc'f' "rc'ec'f' c'f g'qu'r tgekqu'kpvtpcelqpcrgu'f g'qu'eqo o qf kkgu'f' ci i gtq'gv'cr0'4237= Uej qtt'f' "Y clpgt."4236+0'Gur'rc'o kcel»p"geqp»o lec'f'cvc'f' guf g'rc'gvr c'f g'uwvkwel»p'r qt" ko r qt'celqpgu'f' "hwg'rc'ti co gpvg'guwf kcf c'r qt'rc'rkgtcwtc'rqecr'Dtcwp'f' "Lq'f' .3; 8: =F kco cpf . " 3; 95+0'Gur ge'f'leco gpvg.'guv'hp»o gpq'tghktg'c'rc'r tgu»p'gp'rc'f go cpf c'f g'f kxkuc's wg'ug" i gpgtc" gp" wpc" geqpqo 'f'c" eqp" wpc" *estructura productiva desequilibrada*" gp" r gt'qf qu'f g' etgelo kpvq'geqp»o leq'g'kpf wvkc'nif gdlf q'cn'cwo gpvq'f g'rc'ko r qt'cel»p'f g'dkpgu'f g'ecr kcr'g' kpuwo qu'kpvgt o gf kqu'tgs wgtk' qu'r ctc'crko gpvt'gn'r tqeguq'f g'etgelo kpvq0⁹""

:⁸Ugi Àp'rc'rg'f' . 'qu'hdtkcpvqu'f g'cwqo »xkqu'f' "wkkctkqu'eco kppgu'ej'cuku'eqp'f' "ukp'ecdpc."»o pldwu'f' "gl'gu'eqp" f khtgpekn'f' q' ct'f'p'f' g'wp'tgkpgi tq'udtg'gn'xcmq'v'cnf' g'rc'eqo r tcu'f' g'cwqr ct'vgt' . 'o cv'legu'f' "o qrf gu'rqecru0' Gn'tgkpgi tq'ugt'f'gs wxcrgpv'cn'f' : ' "f gn'xcmq'gz'lf dtlec'c'pvgu'f' g'ko r wguv'gp'gn'r tko gt'c° q'f g'r tqf week»p'f' g' f lej q'xgj'f'wq.'gn'9' "gp'gn'ugi wpf q'c° q'f' "gn'8' "gp'gn'vtegt'c° q'f' g'rc'r tqf week»p'f' g'f lej q'xgj'f'wq'0'Rct'c'ugt" dgpghelctkqu'f g'rc'Ng'f' . 'rc'u'cwqr ct'vgt'cf' s wtk' cu'gp'gn' o dka'rqecr'gd'f'p'f' gukpc'ug'c'rc'hdtkcel»p'f' g'xgj'f'wru" q'f' g'gl'gu'eqp'f' khtgpekn'gp'wpc'r'rc'vchqto c'pwgxc'f' "gzemuxc'gp'gn' o dka'f' gn'0' gtequw0C'uko kuo q.'gn'xgj'f'wru" q'gn'gl'g'eqp'f' khtgpekn'f' gdt'f'f'wpgt'wp'eqv'p'k'f' q'o^a zko q'ko r qt'v'f' q'f' gn'52' . 'ecrcwrf q'udtg'gn'xcmq'gz'lf dtlec' f'g'cs wgr0'

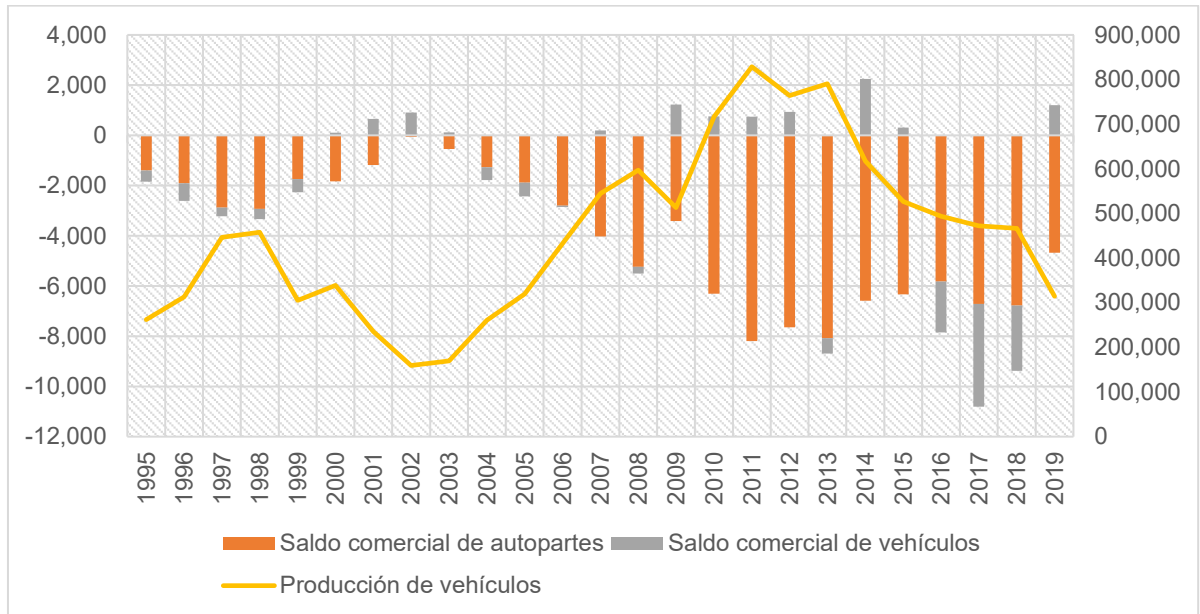
:⁹Gp"Cti gpvpc'guc'j c'uk' q'wpc'rc'o kcel»p'j ku»tlec'cn'f' gucttqm'gp'cvp'q'gn'pk'gn'f' g'ce'v'k'f' c'f' "f'rc'u'vcu'f' g' etgelo kpvq'geqp»o leq'ug'f' cp'xkuv'tgvtkpi k' cu'r qt'rc'f' kur q'pdkk'f' c'f' "f' g'f' kxkuc" *Uej qtt'f' "Y clpgt."4236+0'Gu' f' gek. 's wg'gp'gvr cu'f' g'etgelo kpvq'kpf wvkc'nif' i gpgt'c'p'v'wgmqu'f' g'dq'v'rc'0'gp'rc'f' kur q'pdkk'f' c'f' "f' g'f' kxkuc's wg' f' hlewncp'bxcp| ct'j' celc'r' tqeguqu'f' g'v'cp'uhqto cel»p'f' "eqo r rglk' cel»p'r tqf wv'x'c'f' gn'ugevt0N'qu'r tko gtqu'v'wgmqu'

C'plxgn'ugevqtken'gn'etgekpg'f²hlek'cwqo qvqt. 's wg'cwo gpvcdc'vis a vis'rc'r tqf week»p" f g'xgj 'fwmu'ci txcdc'gn'r tqdrgo c'i gpgtcn'gz vgtq'xgt'I t^a hleq"44+0Gn'o kuo q'gtc'gzi rkecf q." r tlpkr cm gpyg.'r qt'gn'cwo gpvq'f g'rc'ko r qtvekp»f'g'cwqr ctvgt'gs wgtkf cu'r ctc'rc'r tqf week»p" nqecn'f g'xgj 'fwmu'»Rgt gl "Cm cpuk"4242d+0: "Rqt'm'vcpvq."gn'i qdkgtpq'cti gpvqp"cwqo gp»"nqu" eqpvtqngu'c'rc'u'ko r qtvekp»gp'ctcu'f g'tgf wek'gn'etgekpg'f²hlek'f g'rc'lpf wutk'cwqo qvtk'0 Gpvt'g'422: "{ '4233'm'j k q'cwo gpvcpf q'rc'u'r qukekppgu'ctcpegrt'kcu'f gn'ugevqt'crecp| cf cu'r qt'nqu" r gto kuqu'f g'ko r qtvekp»nco cf qu'Nkegpeku'P q"Cwqo^a veku"»NP C+"{ "nwgj q'f gn'4234"eqp" r gto kuqu"o^a u'tgut'ekvqu'f gpqo kpcf qu'F genctekppgu'Lvctf cu' Cpvek'cf cu'f g'ko r qtvekp»p" *FLK'»Rgt gl "Cm cpuk"4242d+0'

"

f'dqymcö'gp'gn'ugevqt'gzvgtq' s wg'xkx'gn'r c'f'u'tgo kgp'c'rc'f²ecf c'f g'3; 52' { 'ug'j keltqp'b cpl'k'guvqu'gp'f kgt'gpvqu' o qo gpvqu'f gn'o qf gmq'f g'uwv'wewek»p'f g'ko r qtvekp»gp'Gn'et'geko kgpvq'gz'v'pukxq' { . 'uqdt'g'vqf q. 'kpv'pukxq'f g'rc' lpf wutk'f'gr gpf'f'f g'rc'ko r qtvekp»f'g'dl'gp'gu'f g'ecr kcn'g'kpuwo qu'kpv'to gf kqu.'r g'q'rc'u'f k'k'ku'p'gegu'ct'kcu'r ctc' h'k'p'cekt'f'lej qu't'gs wgtko kgpvqu'r tqxgp'f'p'hw'f'co gpvcm gpyg'f g'rc'u'g'zr qtvekp»gp'f gn'ugevqt'ci tq'gew'ctkq.'ew'f'c' q'htvc." gur gekcm gpyg'rc'ci t'f'eqrc." ug'g'p'eqp'v'cdc'x'kt'wcm gpyg'g'uc'p'ecf c'0' C" plx'gn'v'g»t'k'eq." nqu' r tqdrgo cu'f g' t'gut'leek»p'gz'v'gt'pc'hw'gt'qp'cdqtf cf qu'gp'Co² t'k'ec'N'c'v'p'c'r qt'rc'u'eq'tt'k'gp'v'gu'g'ut'w'w'c'k'k'ku' { 'f'gr gpf gp'v'ku'cu'j'cek' o gf kcf qu'f gn'iki n'j'rc'cu'f q.'gpvt'g'rc'u'r tko g'qu'gu'w'f'k'qu's w'g't'g'rc'ek'p'ct'qp'g'uc'rc' tqdrgo^a v'ek'eqp'gn'eqo r qt'v'co kgpvq' g'tt^a v'ek'f'g'rc'geq'p'qo 'f'c'ti gp'v'p'c'ug'gp'ew'p'v'ct'p'rc'u'v'cd'cl'qu'hw'p'f'cek'p'c'rgu'Dt'c'w'p' { 'Lq' { *3; 8: +'f'F'k'co'c'p'f' *3; 95+0' Nwgj q.'Vj k'ny'cni' *3; 9; +'h'q'to'c'ik' »'g'ug'r' t'q'eg'qu' r'rc'p'v'g'c'p'f' q' s wg'rc'v'c'uc'f' g'et'geko kgpvq' t'gs wgtkf c'r ctc'crecp| ct'gn' r'ng'p'q'go r'ng'q'ug'gp'ew'p'v'c'r' qt'g'p'eko' c'f'g'c's'w'gm'»eqo r'c'v'd'ng'»eqp'gn'gs'w'k'k'd't'k'q'gz'v'gt'p'q'0'G'ug'r' tqdrgo c'j'c'uk'q' e'gp'v'c'ri'c'iq'rc'ti q'f'g'rc'j' k'v'q't'k'geq'p'»o' k'ec'c'ti'gp'v'p'c.'t'g'r' t'g'ug'p'v'c'p'f' q'v'p'c'f'g'rc'u'r' t'lp'ek'rc'gu'v't'cd'cu't' ctc'rc'»eq'p'et'gek'p' f'g'r' t'q'eg'qu'f'g'f'g'uctt'q'm'geq'p'»o' k'eq'0' :'' Gp' r'c't'v'ew'ct." rc'u' r' tqdrgo^a v'eku'gp'v'q't'p'q' c'n'f²hlek'»eqo' g't'ek'n' s'w'g' i' g'p'g't'c'rc'lpf'wutk'»cwqo' qvtk' »hw'gt'qp' gu'w'f'k'cf'cu'co' r' n'co' g'p'v'g'c'pl'x'gn'i' n'd'cn' { 'n'q'ec'n'0' C'n'f'g'ur' g'ev'q.'c'pl'x'gn'lp'v'gt'p'cek'p'c'n'ug'f'g'uc'cep'uw'ec'w'uc'c'r'c't'v'k' f'g'rc'u'r' t'q'eg'qu'f'g'f'g'ur'q'ec'ik'cek'p' { 'h'c'i' o' g'p'v'ek'p'i' n'd'cn'f'g'rc'r' tqf'week»p.'rc'v'g'p'f'g'p'ek'j'cek'rc'f'g'ul'p'v'gi' t'cek'p' x'gt'v'ec'n'f'g'rc'u'i' t'c'p'f'g'u'k'ko' cu'lpf'wutk'rgu.'rc'p'w'g'x'c'f'k'k'k'p'lp'v'gt'p'cek'p'c'n'f'gn'v'cd'cl'q'g'uc'd'ng'ek'f'c'r'qt'rc'u'i' t'c'p'f'g'u' k'ko' cu.'rc'lp'v'q'f'week»p'f'g'p'w'g'x'cu' | q'p'cu'c'n'eqo' g'tek'q' o' w'p'f'k'cn'rc'»eq'p'q'to'cek'p'gp' o' g'tec'f'qu't'gi' k'q'p'c'rgu'f'g'rc' lpf'wutk'»cwqo' qvtk' .rc'»eg'p'v'c'ri'k'cf'f'g'rc'u'g'o' r' t'g'uc'u'v'g'to' k'p'c'rgu'gp'uw'ec'f'g'p'c'f'g'x'c'm'q't.'rc'i' q'd'g't'p'c'p' c'c'n'lp'v'gt'k'q't'f'g' rc'v't'co' c'q'rc'»eq'p'v'c'ek'p'g'lp'v'gt'p'cek'p'c'ri'k'cek'p'f'g'rc'v'co' c'c'w'q'r'c't'v'k'c'»Ct| c' { 'N'q'r' g'l' .422: »H'k'i'c'p'v' { \ wo' r'g.' 4239=I' g't'g'h'k'g'v'c'n'0'4223=V0'U'w'i' g'q'p'g'v'c'n'0'422: »U'w'i' g'q'p'g'v'c'n'0'422: »U'w'i' g'q'p' { 'D'k'g'g'd't'q'g'em'4233+0' C'pl'x'gn' n'q'ec'n'rc'»h'k'g'c'w'c'j' c'cd'q't'f'cf'q'rc'u'g'ur'g'ek'h'ek'f'cf'g'u'j' k'w'»t'k'ec'u'f'g'rc'lpf'wutk'»cwqo' qvtk' .rc'»h'g'i' o' g'p'v'ek'p'c'n'lp'v'gt'k'q't' f'gn'g'ur'd'p'»cw'q'r'c't'v'k'c'."gn'c'v'c'cu'q'v'g'ep'q'»i' k'eq'f'g'rc'»t'co' c'cw'q'r'c't'v'k'c'."rc'»k'p'ug't'ek'p'»c'uko² v'k'ec'gp'gn'o' g'tec'f'q' t'gi' k'q'p'c'n' { 'rc'j' g't'g'p'ek'f'g'rc'»g'v'c'c'f'g'rc'»eq'p'x'g't'v'k'k'f'cf'»Ct| c' { 'N'q'r' g'l' .422: »D'c't'ng'v'c'g'v'c'n'0'4235=»D'k'n'4237=» E'c'p'v'c't'g'm'c'g'v'c'n'0'4239=»R'c'p'k'i' q.'I^a t'tk' .g'v'c'n'0'4239=»R'lp'c' q.'4237+0'

Gráfico II-2 - Producción de vehículos (unidades) (eje derecho) y saldo comercial de vehículos y autopartes (millones de dólares) (eje izquierdo) (1995-2019)



Hwpgv<grndqtcek>p'r tqr lc'gp'dcug'c'CF GHC.'CHCE'{'EQO VTCF G0'

C'hkpgu'f'g'4235'c'r ct'kt'f'g'rc'tgtceek>p'geqp>>o kec'f'g'Dtcukl'{'rc'ec'f'c'f'g'u'w'f'go c'p'f'c' f'g'x'gj'f'w'qu'gn'lekm'c'uegpf'gp'v'eqo'gp|cdc'c'ci'q'ctug'0C'u'w'x'gj'. 'gn'r'c'f'u'x'g'ek'p'q'ko'r'ngo'gp'vdc' gn'R'p'k'p'x'ct'C'w'q.'eqp'gn'ew'cn'ug'd'w'ue>'ewdt'k'gn'c'x'c'peg'f'g'h'q'u'x'gj'f'w'qu'cu'k'v'equ.'o'gz'k'ec'p'qu' {'g'w'qr'g'qu'v'c'v'ep'q'f'f'g'k'p'eg'v'x'ct'rc'u'k'p'x'gt'uk'p'p'gu'gp'gn'io'gtecf'q'k'p'v'g't'p'q.'f'g'o'c'p'g't'c'v'n's'w'g' C'ti'g'p'v'p'c' r'g't'f'k'x'gt'uk'p'p'gu'c'v'c'f'f'cu' r'qt' Dtcukl' *J' q't'ce'k'q' E'g'r'g'f'c.' g'p't'g'x'k'uc' v'g'n'h'p'k'ec.' 2: 124423; +0C'g'm'q'ug'w'uo >'rc'eq'p't'ceek>p'f'gn'io'gtecf'q'h'ec'n'c't'c'f'f'f'g'c'w'o'g'p'v'q'u'f'g'h'q'u'r't'g'ek'qu' k'p'v'g't'p'q.'rc'f'g'x'c'm'ce'k>p'f'g'k'p'ek'qu'f'g'4236'{'rc'g'g'x'c'ek>p'f'g'rc'u'v'c'u'c'u'f'g'k'p'v'g't'²'u'0'

H'g'p'v'g'c'g'u'v'g'eq'p'v'z'v'q.'gp'4236'gn'f'q'd'k'g't'p'q'c'ti'g'p'v'p'q't'g'p'q'x>'u'w'c'ew'g't'f'q'd'k'x'v'g't'c'n'eq'p' Dtcukl'{'u'g't'g'f'w'q'gn'x'c'm't'r't'q'v'eq'net'f'gn'h'g'z'f'g'3.; 7'/'s'w'g'ug'j'c'd'f'c'o'c'p'v'g'p'k'f'q'f'g'uf'g'gn'4228' j'c'w'c'f'k'ej'c'h'g'ej'c'/'c'3.72.'d'c'l'c'p'f'q'rc'ec'p'k'f'c'f'f'g'x'gj'f'w'qu'{'c'w'q'r'c't'v'g'u's'w'g'r'q'f'f'c'p'k'o'r'q't'v'ct'ug' f'g'uf'g'gn'r'c'f'u'x'g'ek'p'q'0C'uko'k'uo'q.'ug'g'u'v'c'd'ng'ek>'gn'r'nc'p'R't'q'E't'g'C'w'q.'gn'ew'cn'eq'p'uk'f'c'gp'q'v'q't'i'c't' et²'f'k'qu'f'g'82'ew'q'v'c'c'v'c'u'c'u'w'd'uk'k'cf'cu'v'v'c't'c'rc'eq'o'r't'c'f'g'c's'w'm'q'u'v'o'q'f'g'm'q'u'f'g'd'c'l'c'q'b'g'f'k'c' i'c'o'c'h'c'd't'k'ec'f'qu'gp'gn'r'c'f'u's'w'g'rc'u'v'g't'o'k'p'c'm'g'u'j'c'c'p't'g'x'k'uc'f'q'u'w'u'r't'g'ek'qu'0'

G'p't'g'w'o'g'p.'f'w't'c'p'v'g'g'u'v'c'g'v'c'r'c'ug'ng'x>'c'c'ed'q'w'p'c'h'w'g't'v'g'g'z'r'c'p'uk>p'f'g'rc'k'p'f'w'w't'k'c' cw'q'o'q'v't'k'c'ti'g'p'v'p'c'k'o'r'w'u'v'c'f'c'r'qt'rc'f'g'o'c'p'f'c'f'g'Dtcukl'{'w'p'o'gtecf'q'k'p'v'g't'p'q'gp'c'ue'g'p'qu' n'w'g'i'q'f'g'rc'et'k'uk'f'g'rc'eq'p'x'g't'v'd'k'k'f'c'f'0G'u'v'q'ug'x'k'q'g'x'k'f'g'p'ek'f'q'gp'gn'c'w'o'g'p'v'q'f'g'rc'r't'q'f'w'ee'k>p.' x'g'p'v'c'u.'g'z'r'q't'v'c'ek'p'p'g'u'{'g'o'r'ng'qu'gp'gn'ig'ev'q't'0U'k'p'g'o'd'c'ti'q.'gn'uc'rf'q'eq'o'g't'ek'c'n'f'gn'le'q'o'r'ng'l'q'h'w'g'

∴; u'c'u'k'd'c'p'f'gn'39'c'n'3; .4' g'p'w'p'c'o'q'gp'gn'is'w'g'ug't'g'i'k'u't>'w'p'5; " f'g'k'p'h'ce'k>p'c'p'w'c'n'45'1284236.'Nc'P'c'ek>p'0'

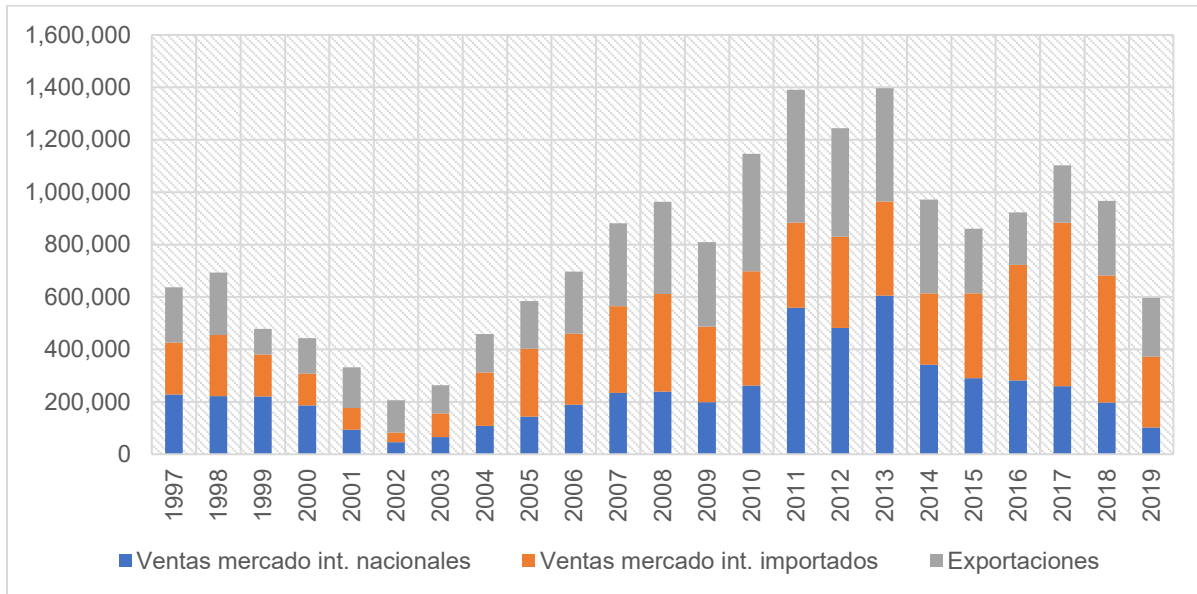
r gtuwvpgvgo gpv'f ghlekctkq. 'ci tcx^a pf qug'ht g'v'c'hu'p'kxgrgu'tgi kmtcf qu'gp'hc'f²ecf c'f g'3; ; 20 Guv'gu'g'zr n'ecf q'r t'k'ekr cm g'v'g'r qt'gr'cwo g'v'f'f'g'ru'ko r qt'v'ek'q'p'gu'f'g'c'w'qr ct'v'gu. 'ru'ev'w'rgu' etge'f'p' cn' t'ko q' f'gn' o c'qt' p'Ào gtq' f'g' x'g'j 'f'w'qu' r tqf'w'ek'f'qu' gp' gn' r c'f'u'0' Gm' ug' h'w'g' r tq'w'p'f'k' cp'f'q'eq'v'k'p'w'co g'v'g'w'gi q'f'g'rc'et'k'uk'f'g'422: /; "{ 'eq'v'k'd'w'f' »'cn'et'g'ek'p'v'g'r tq'd'rgo c' f'g'hc'nc'f'g'f'k'k'uc'u'gp'rc'ge'q'p'qo 'f'c'cti g'p'k'p'c'0''''

2.2.2 - La etapa del gobierno de Cambiemos (2015-2019)

" Nc'cuwpek»p'f'g'O cwt'ek'q'O cet'k'eqo q'r t'g'uk'f' g'v'g'f'g'rc' 'Cti g'p'k'p'c'uki p'k'k'e»'w'p'r w'p'v'q'f'g' s'w'k'd't'g'gp'rc'qt'k'g'p'v'ek'p'f'g'rc'r q'n'f'k'ec'o cet'q'ge'q'p'»o lec'f' 'r tqf'w'ek'x'c'0'c'r ct'v'k'f'g'f'lek'go dt'g'f'g' 4237'rc'p'w'g'x'c'cf'o k'p'k'ut'cek'p'ko r r'go g'p'w'»'w'p'c'r q'n'f'k'ec'ew'f'qu't'cui qu'uc'nd'g'p'v'gu'h'w'gt'q'p'gn'c'x'c'p'eg' gp'rc'cr'gt'w'tc'eqo g'tek'cn'f' 'rc'f'g'ut'gi w'rc'ek'p' 'h'p'c'p'ek'g'tc'f' 'eco d'k't'k'."o ct'ec'p'f'q'w'p'p'q'v'c'd'rg'i k'q' eq'p' t'g'ur'g'ev'q' c' rc' g'v'c'r c' cp'v'g't'k'q't' *D'w'i qu." 4239=" Y c'k'p'g't' { " D'g'm'q'p'k' 4239-0' C' " p'k'x'gn' o cet'q'ge'q'p'»o leq.'f'w't'c'p'v'g'4238'rc'f'g'x'c'n'w'ec'ek'p'i g'p'g't'c'f'c'r qt'rc'w'p'k'h'ek'ec'ek'p'f'gn'o g'tec'f'q'f'g' eco d'k'qu." u'wo c'f'c' cn' cl'w'w'g'f'g' w't'k'h'cu." k'p'et'go g'p'w'»' gn' r tq'eg'u'q' k'p'h'rc'ek'q'p'ct'k'q." s'w'g' p'q' h'w'g' ce'qo r c'° c'f'q'r qt'rc'hu'uc'rc't'k'qu." t'g'w't'c' { g'p'f'q'gn'uc'rc't'k'q't'g'cn'f' { gn'eq'p'uw'o q'k'p'v'g't'p'q' *P'g'h'c."4239-0' Eqo r r'go g'p'v'ct'k'co g'p'v'g'."rc'u'g'g'x'c'f'cu'v'c'uc'u'f'g'k'p'v'g't'2'u't'g'c'rg'u'ug'f'go qu't'ct'q'p'k'p'g'h'ev'k'x'cu'r c'tc'f'g'uce'g'rg't'ct'rc'k'p'h'rc'ek'p' { "ch'g'ev'ct'q'p'p'gi c'v'k'x'co g'p'v'g'gn'x'q'n'w'o g'p'f'g'k'p'x'g't'ul'ek'p'0'C"uw'x'g'l'."rc'u' p'w'g'x'cu'r q'n'f'k'ec'u'w'x'k'g't'q'p'w'p'h'w'g't'v'g'lo r ce'v'q'gp'gn't'g'v't'q'eg'u'q'f'gn'uge'v'q't'k'p'f'w'ut'k'rc'n'i g'p'g't'cn' *R'g't'g'l' " C'mo c'p'uk'f' { 'I' t'cu'q'."4239="U'c'p'v'ct'e^a pi g'm'g'v'c'ri'0'423; +0"

Gp'hu'q's w'g't'g'ur'g'ev'c'rc'k'p'f'w'ut'k'c'w'w'q'o q'v't'k'."ug'g'l'g'ew'ct'q'p'w'p'c'ug't'k'g'f'g'r q'n'f'k'ec'u'r À'd'rc'ec'u' s'w'g'ch'g'ev'ct'q'p'cn'uge'v'q't'0'G'p'v't'g'2'uc'u."ug'g'p'ew'g'p'v't'c'p'rc'u't'g'h'g't'k'f'cu'c'rc'cr'gt'w'tc'eqo g'tek'cn'eqo q' gn't'g'go r rc'q'f'g'rc'u't'g'ut'k'ev'k'x'cu'F'LC'K'u."s'w'g'j'cd'f'c'p't'g'ek'd'k'f'q'w'p'hc'm'q'cf'x'g't'u'q'c'rc' 'Cti g'p'k'p'c'gp' rc'Q'ti c'p'k'c'ek'p' 'O'w'p'f'k'cn'f'gn'Eqo g'tek'q' *Q'O'E+."r qt'gn'U'k'w'go c' "k'p'v'gi t'cn'f'g' 'O'q'p'k'q't'g'q'f'g' K'o r qt'v'ek'q'p'gu' *U'K'O'K'."gn'ev'c'rc'n't'k'i k'»'r c'tc'w'p'p'Ào gtq'o g'p'q't'f'g'rc'u'r'q'ule'k'q'p'gu'ct'c'p'eg'rc't'k'cu'0'c'uw' x'g'l'."rc'u'o g'p'ek'q'p'c'f'qu'eco d'k'qu'o cet'q'ge'q'p'»o leq'f' { "f'g't'gi w'rc'ek'p'uge'v'q't'k'cn'gp'gn'eq'p'v'g'z'v'q'f'g' t'g'eg'uk'p'f'gn'o g'tec'f'q'd't'c'uk'g'° q."f'k'g't'q'p'eqo q't'g'u'w'x'c'f'q'w'p'h'w'g't'v'g'c'wo g'p'v'q'f'g'rc'r'g'p'g't'cek'p' ko r qt'v'c'f'q't'c'gp'gn'o g'tec'f'q'k'p'v'g't'p'q'f'g'x'g'j' 'f'w'qu' *x'g't'I t^a h'ek'qu'KK4" { 'KK5+.'cu'f'eqo q'w'p'c'wo g'p'v'q' f'g'rc'u'ko r qt'v'ek'q'p'gu'f'g'c'w'q'r ct'v'gu'r qt'x'g'j' 'f'w'qu' r tqf'w'ek'f'q'c'p'k'x'gn'p'cek'q'p'cn="v'q'f'q'g'm'q'gp'w'p' eq'p'v'g'z'v'q'f'g'h'w'g't'v'g'ec'f'c'f'g'rc'u'p'k'x'grgu'f'g'r tqf'w'ec'ek'p'f'g'x'g'j' 'f'w'qu' *x'g't'I t^a h'ek'qu'KK3" { 'KK4-0'

Gráfico II-3 - Ventas en el mercado interno (importados y nacionales) y exportaciones de vehículos (unidades) (1997-2019)



Hwpgv<gndqtc&p'r tqr kc'gp'dcug'c'CF GHC0'

Rqt" qvtq" rcf q." gp" 4238" ug" flew" r" Ng{" 490485" f g" T2i ko gp" f g" F gucttqmq" {" Hqtvcgelo kpvq'f gn'CWqr ctvuo q'Cti gpvqp'c'r ctvt'f g'r'ewcn'ug'qvqi »'wp"dppq'ggev>pleq' f g'et'f kq'hu'ec'n'c'ru'cwqo qvlegu's wg'eqo r tctcp'r ctvgu'{' r kgl cu'pcekqpcrgu02"C'uw'xgl . "gp" 4239." Àpleq" c° q' f g' etgelo kpvq' geqp»o leq' f g' r" i guv&p" f g' O cetk" ug' r tgu'gp»" gn' Rrcp" Cwqo qvk' "õ3'O km'põ's wg'cr wvdc'c'rc'hdtkce&p' f g'wp'o km'p' f g'xgj 'f'wqu'c'r ctvt'f g'wp' cewgtf q'gpvt'g'gn'Gucf q."go r tgu'cu'{' "ukpf kecqu'gp'gn's wg'ug'r tqo gv'f'o c { qt'kpxgtuk&p."pwgxcu' vgepqmi 'f'cu."pwgxcu'eqpxgpkqu'rcdqtcrgu' {" "o glqtcu'gp'gn'ceeguq" c"r"eqo r tc'f g'wpkf cf gu0 Cf go a u.'c'hp'gu'f g'4239'ug'ht'o »'wp'cewgtf q'f g'eqo gtekq'gz vgtkq'f gn'O gtequw'eqp'Eqmqo dlc' r ctc'kpvgteco dkt'xgj 'f'wqu'eqp'ctcpegn'egtq'j cuvc'64022'wpkf cf gu'CEG'94+0'

GP'423: . 'hwgi q'f g'r'uwdc'f g'ru'vcucu'f g'lpvt2'u'lpvtpcekqpcrgu'{' "r' r tqhw'pf k cel&p' f g' ru' lpeqpukv'gpeku'lpvtpcu."Cti gpvqp'eqo gp| »"c"s wgf ctug'ukp'hwpgvu'f g'hp'cpeko kpvq' gz vgtpq.'r qt'm'ewcn'tgewt&'cn'Hqpf q'O qpgv'kq'k'vtpcekqpcn'HO K'gn'ewcn'ng'qvqi »'wpq'f g' rnu'r t2'wco qu'o a u'cnqu'f g'r'j kvqtk'f gn'qti cpluo q0Guc'etkuku'geqp»o leq/hp'cpektc'ngx»"c" r'f gxcnw&ek&p'f gn'vr q'f g'eco dlc'necn:3'{"cn'cwo gpvq'f g'r'tgecw'f cel&p'ko r qukk&c'f gn'Gucf q0 Cu'f'ug'tggucd'ng&ektq'ko r wgu'qu'f g'85'r qt'w&u3'c'ru'g'zr qt'w&ek'q'p'g'f'r tqf w&qu'kpf w&tk&rgu." rnu'ew&rgu'chgevtq'p'cpvq'c'ru'vgt'o lpcrgu'cwqo qvlegu'eqo q'c'ru'cwqr ctvuo'g'zr qt'v'f qt'cu0'

:2'F lej q'dppq'xctk&dc'f gn'6'cn'37' "f gn'xcrqt'f g'ru'r ctvgu'{' r kgl cu'cf s wtkf cu'gp'gn'r e'f'0'
 :3'Gn'ewcn'r cu»'f g'842'r qt'w&u3'gp'4239'c'882'r qt'w&u3'gp'423; . 'lpenw'f gpf q'tgut'lv&xqu'eqpvtqrgu'eco dktkqu0''

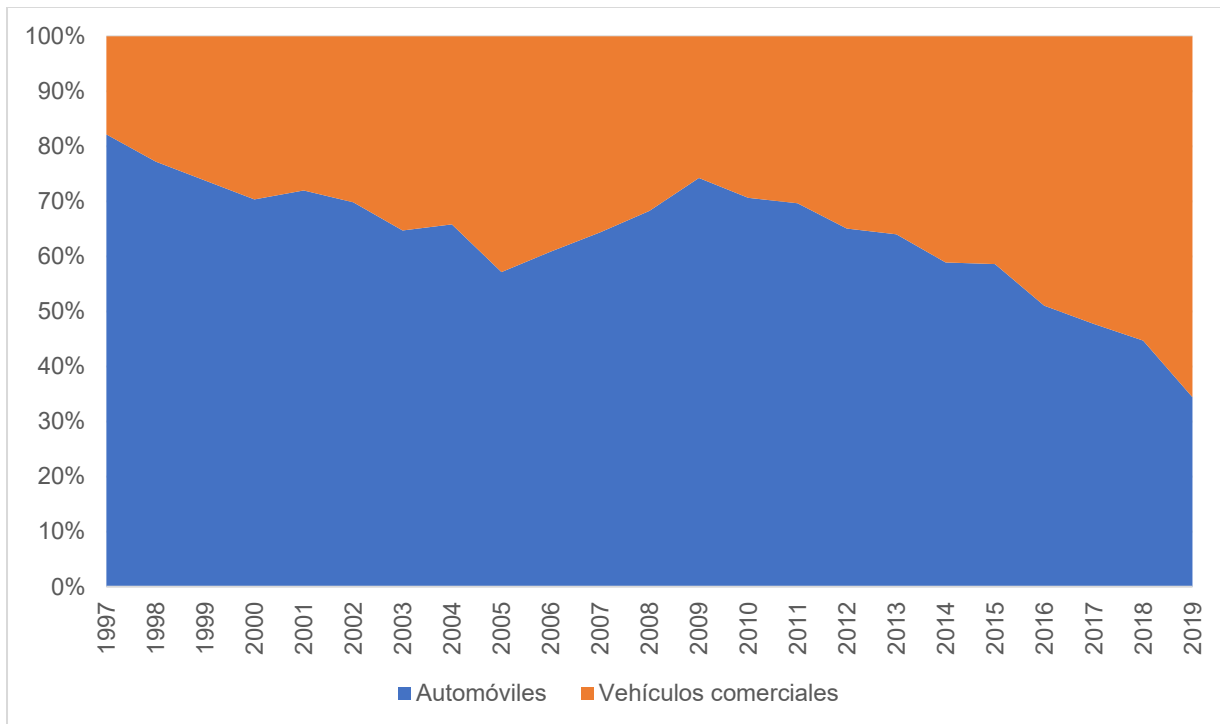
Cf go ^a u."ug'tgf wgtqp'hqu'tgkpvgi tq'u'c'rcu'gZR qtvekpqgu'f g'dkpgu'cwqo qvqtgu'f g'8.7' 'c'5.4' 0 Gp"423; "rc'etkuku'geqp»o kec'ug'r tqhwf k »."ci tcx^a pf qug'rc'tgeguk»p'c'r ctvt'f g'rcu'ec'ff cu'gp'gn' eqpuwo q.'rc'r tqf week»p{"gn'go r ngq."gptg'qvtqu'kpf kec'qtgu'0Cu'ff'rc'r tqf week»p'cwqo qvtk'ug' f gur nqo »"ngi c'pf q" c"ecuk'522022"xgj 'f'wqu'r tqf wekf qu."gn'xcnqt"o ^a u'dclq'f g'rc'f²ecf c"*xgt" I t^a hleq"KK3+0'

Cpv'gn'et'gekp'v'f² hlek'eqo gteknf'gn'ugevt'tgi kvtcf q'gp'hqu'Ànko qu'c'° qu'f g'rc'i guk»p" *xgt" I t^a hleq"KK4+."gn' qdkgtpq'f g'O cetk'guvdrgek»'wp'pwxq'cewgtf q'cwqo qvqt'eqp'gn'gpt'cpvg" i qdkgtpq'f g"Dqnuq'pctq" gp"Dtcuk'0'Gp" gn'pwxq'v'c'v'f q"ug"o qf kke»" gn'eqghlek'p'v'g' hgz" f g' eqo gteq'ugev'k'cn'gpt'g'mu'r c'ff'gu."s w'ug"o cpvg'p'c"gp"3.720'C"r ctvt'f g'gn'pwxq'cewgtf q."gn' xcnqt'r tqveq'nt'ug"cw g'p»"c"3.92."uwd'k'p'f q'rcu'ec'p'k'f'cf'gu'f g'ko r qtvek»p'r gto k'k'cu'f'guf'g' gn'r c'ff'x'gek'p'j'cek" Cti gp'k'p'0'Uk'p" go d'cti q."m'p'q'x'g'f'qu'f'g'g'ug'v'v'c'v'f q."c'f' hgt'g'pek'f'g'mu' cpv'k'q'gu."gu's w'f'lej q'hgz'ug'guvdrgek»'eqp'ect^a evgt'tg'v'q'ce'v'x'q."eqp'x'ki'g'pek'f'guf'g'42370' F'g'g'ug'o qf q.'ug'ngu'r gtf qp»"c'rcu'go r tguc'u'k'p'uet'k'v'cu'gp'gn't²i ko gp'cwqo qvtk'rcu'o w'ncu'r'qt" r²tf'k'f'c" f'g' r'tgh'g'g'pek" c'te'p'eg'nt'k" s w'ngu' eqtt'gur'q'p'f'c" r'qt" j'cd'gt'ug" g'zeg'f'k'f'q" gp"rcu' ko r qtvekp'p'gu" c' Cti gp'k'p'f'gn'xcnqt'r tqveq'nt' h'k'f'q'gp"4238'eqp'x'ki'g'pek'j'cu'c'4242'*Rgt'g'j" C'm'cpuk'4244+0⁴"

Cuko kuo q."gp'g'ug'eqpv'z'v'f'g'f'gr't'guk»p'f'gn'o gtecf q'k'p'v'g'p'q'{"t'gi'k'q'p'cn'rc'k'p'f'w'v'k'k" cwqo qvtk'c'ti'gp'k'p'j'c'k'f'q"eco'k'p'f'q"uw'gur'gek'ik'cek»p'r tqf we'k'c"*xgt" I t^a hleq"KK6+0'Nc" ec'ff'c'f'g'rc'r tqf week»p't'gec'{"r't'k'pek'c'm'gp'v'g'gp"mu'cwqo »x'k'ngu."r'gt'q"r't^aev'eco'gp'v'g'p'q" ko r'cew"gp"mu'x'gj'f'w'qu'eqo gtekn'gu"/eco'k'p'p'gu."eco'k'p'p'g'cu."g'v'e'0'ugi'og'p'v'q" f'qo'k'p'f'q" r't'k'pek'c'm'gp'v'g'r'qt'rcu'r'k'ent'w'u/. 's w'f'c'p'ct'q'p'r'ct'v'ek'r'cek»p'gp'gn'v'c'n'r'q'f'we'k'f'q'f'g'rc'k'p'f'w'v'k'k" cwqo qvtk' *xgt" I t^a hleq"KK7"{"I t^a hleq'u'2/3'f'gn'c'p'g'z'q'G'uc'f'ff'v'k'eq+0'G'ug'v'eco'k'q'hw'g'c'À'p'o ^a u' ko r'qt'v'p'v'g'gp"rc'g'z'r'qt'v'ek»p'f'g'x'gj'f'w'qu."f'q'p'f'g'c" h'k'p'gu'f'g'rc'f²ecf'c'f'g'3; ; 2"gn'42' " eqtt'gur'q'p'f'c" c"x'gj'f'w'qu'eqo gtekn'gu'{"gn't'gu'v'c'p'v'g': 2' "c'cwqo »x'k'ngu."o'k'g'p'v'cu's w'g'r'c'tc'rc" ugi'w'p'f'c'f²ecf'c'f'gn'4222'f'lej'c'g'ew'cek»p'ug'k'p'x'k'v'k» *xgt" I t^a hleq'2/4'f'gn'c'p'g'z'q'G'uc'f'ff'v'k'eq+0'

⁴"Cf go ^a u."gp"423; "Cti gp'k'p'c'k'o »"gn'4'À'rt'q'v'eq'm'f'gn'CEG'35'eqp'R'ct'ci'w'c'{"c'v'c'x²u'f'gn'ew'c'n'r't^aev'eco'gp'v'g' v'q'f'qu'hqu'cwqo »x'k'ngu'r'q'f't^ap'k'p'i't'g'uct'f'g'o'c'p'g't'c'k'p'o'g'f'k'c'v'{"h'k'd't'g'f'g'c't'c'p'eg'nu'c'R'ct'ci'w'c'0

Gráfico II-4 – Producción de vehículos en Argentina por tipo (porcentajes) (1997-2019)



Hwpgv<gndqtcek>p'r tqr kc'gp'dcug'c'CF GHC'

F g'guc'hqto c.'f wtcpv'f kej c'gvr c'ug'ingx>>c'ecdq'wpc'hwtg'tgtceek>p'f g'rc'kpf wutkc' cwqo qvtk' "mecn's wg'ci tcx>>"ru'r tqdrgo cu'r t gugpvu'gp"rc'hcug'r t gxc0'Cu'cf go^a u'f g'rcu' ci wf cu'ec'f cu'gp'rc'r tqf week>p'f g'xgj 'fwrqu' { 'rc'r² tf kf c'f g'r wguqu'f g'tcdclq'gp'gn'ugevt. 'ug' r tqhwf k' >>gn'f² hck'eqo gteknf gn'eqo r rglq'cwqo qvt0'Rqt'wp'rcf q. 'ug'o cpwxq'wp'cnq'pk'gn' f g'ko r qtcekppu'f g'cwqr ctvgu.'cn'o kuo q'vgo r q's wg'ec'c'rc'r tqf week>p'f g'xgj 'fwrqu.'r gtq.' cf go^a u." ug' uwo ctqp' etgekpvu' f² hcku' gp' rcu' ko r qtcekppu' f g' xgj 'fwrqu' vgo kpcf qu.' ci tcxcpf q'gn'ewcf tq'f g'rc'kpf wutkc'0'Uk'go dci q.'gug'tgeqtkf q'i gpgtcn'f gn'ugevt'pq'hwg' j qo qi² pgq' gvtg'rcu' 34' vgo kpcrgu' f gn'eqo r rglq' cwqo qvt. :⁵ gvtg'rcu' ewcrgu' t gucnc' gp' r ctvewt'rc'vc { gevtk'f guctqmf c'r qt'Vq { qc' Cti gpvpc0'

2.3 - Desempeño económico de cada terminal automotriz (2002-2019)

C'r guct'f g'gug'tgeqtkf q'i gpgtcn'f g'rc'kpf wutkc'cwqo qvtk' "gp'Cti gpvpc.'pq'vqf cu'rcu' vgo kpcrgu'ug'f gugo r g° ctqp'f g'rc'o kuo c'hqto c'hwi q'f g'rc'etkuf g'rc'eqpxgt vdkkf cf 0F gvtq'

:⁵C'rcu'vgo kpcrgu'cwqo qvtegu' { c'kpu'rcf cu'cpvu'f g'rc'etkuf g'rc'eqpxgt vdkkf cf "k'geq.'Hcv'Hqtf.'I gpgtcn' O qvtu.'Rgw' gqvEktqgp.'Tgpcw.'O gtegf gu/Dgp|. 'Xqmuy ci gp' { 'Vq { qc'ug'wo cp'f qu'ht'o cu'lc' r ppguc'J qpf c' gp'4233' { 'Pku'cp'gp'423: 0'Vco dR'p'ug'gpewpvc'rc'uwec'Uecpk'eqp'wpc'r r pvc'gp'Vvewo^a p.'r gtq'ug'rc'gzenw'f g'rcu'cp' r kku' { c's wg'gp'Cti gpvpc'rc'ht'o c'ug'f gf kec'c'rc'r tqf week>p'f g'ukvgo cu'f g'tcpuo kkp' { 'pq'c'rc' hcdtkecek>p'f g'xgj 'fwrqu'

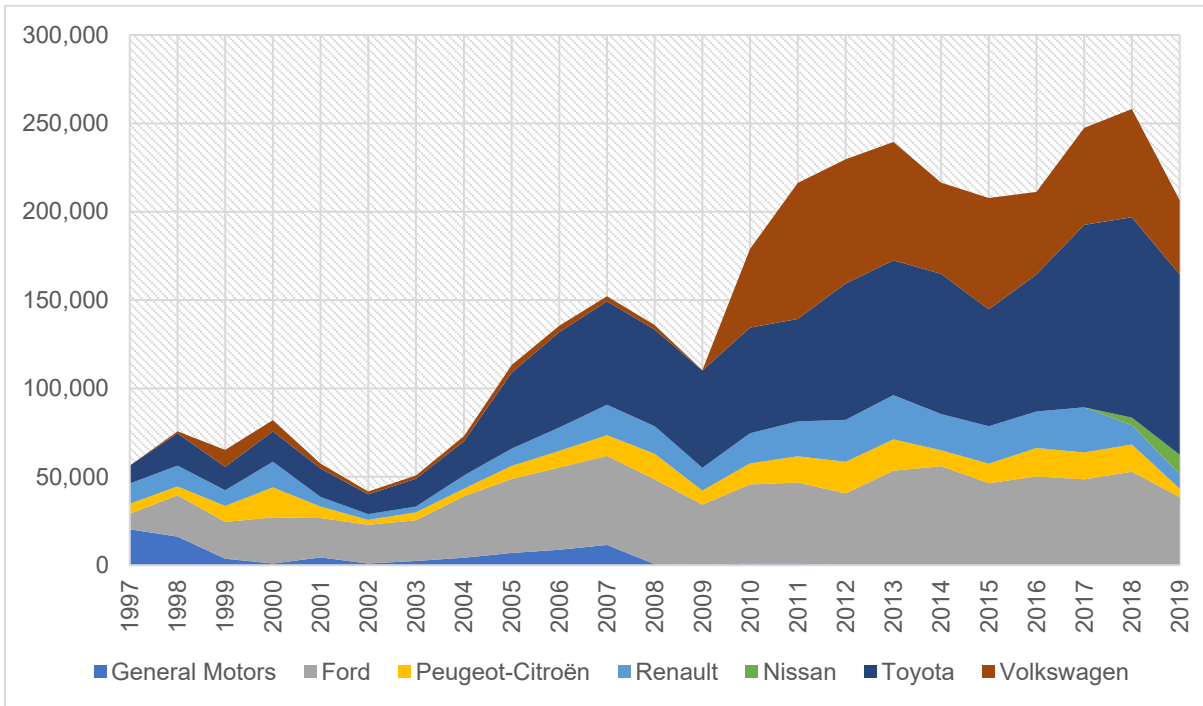
f g" guvg" eqo r qtwco kpvq" j gvtqi 2 pgg." ug" f guvcec" r" cwur lekquc" performance" f g" Vq{ qvc" Cti gpvpc0Rqt" wp" rcf q." gp" v to kpqu" f g" r tqf weekp" f g" xgj f wqu." o kpvctu" rnu" vgtto kpcrgu" cwqo qvlegu" etgekgtqp" c" wp" tko q" f gn8' . 'rc' hto c' lcr qpguc" m' j k q" cn3; ' "gpvtg"4224" { "423; 0' F guf g" uw" kpuvrc" k" p" gp" 3; ; 9. "ewcpf q" ug" wdkcdc" gp" gn' u' r vko q" nxi ct" ugi Ap" r" r tqf weekp" f g" ecf c" vgtto kpcn" guecn" cnlewct vq" gp" 4227. 't cucpf q" cnlugi wpf q" gp" 4236" { 'mgi cpf q" c' lgt' gn' r tkpek' cn' r tqf vevqt" f g" xgj f wqu" gpvtg" 4238" { "423; 0"

Guv" f gugo r g° q" tguenc" cAp" o a u" cn' f hgt gpekt" r" r tqf weekp" r qt" vr q" f g" xgj f wqu" { c" s wg" f guf g" uw" kpekqu" Vq{ qvc" eqpegpvt" »" uwu" qr gtcekqpgu" gp" r" r tqf weekp" f g" r" r len' w' J kwz0' F g" guvg" o qf q." o kpvctu" r" r tqf weekp" f g" xgj f wqu" f g" r cuclgtqu" gp" Cti gpvpc" ec{ »" eqpuvcpvgo gpv" nagi q" f g" r" eqpvtceekp" geqp» o kec" f g" Dtcukri" gp" 4235" *xgt" I t^a hleq" 2/3" f gn' Cpgzq" Guvcf f wqu" r" r" f g" xgj f wqu" eqo gteknru" r kxkpqu" ug" o cpwxq" *xgt" I t^a hleq" KK7+0' Gp" r ctvewrt. 'r" r tqf weekp" f g" xgj f wqu" wvknctkqu" etgek" gp" i tcp" o gf kf c" hagi q" f g" 4232" c" r ctvt" f g" r" hcdtkecekp" f g" r" Xqmuy ci gp" Co ctqm" s wg" ug" uwo »" c" rqu" qvtqu" o qf grqu" f g" r len' w' u" f g" o c{ qt" 2 zkk. "r" o gpekqpcf c" J kwz" { "r" Hqtf "Tcpi gt0⁶" F g" guvg" o qf q." gpvtg" 4239" { "423; "rqu" xgj f wqu" eqo gteknru" gzi rlectqp" r" o c{ qt" r ctv" f g" r" r tqf weekp" gp" gn' r c" u0Gp" guvg" o cteq. "gn' f gugo r g° q" f g" Vq{ qvc" ug" f guvcec" vqf cx" f c" o a u." { c" s wg" r cu" »" f g" gzi rlect" gn' 45' 'f g" r" hcdtkecekp" f g" xgj f wqu" eqo gteknru" gp" 4224" j cuvc" gn' 6; ' "gp" 423; *xgt" I t^a hleq" KK7+0'

"
"

:⁶C" o gf kf qu" f g" 423: 'P kuucp" eqo gp| »" c' hcdtlect" uw' r len' w' Htqpvtg" gp" E»tf qdc. 'nagi q" f g" lpxgtvt" gp" co r rict" r" ecr cekf cf "kpuvrc" f c" f g" r" r rpv" f g" Tgpcwv" uqekq" i mdcn' f g" P kuucp0C" uw" xgl . "Tgpcwv" uwo »" r" qvc" r len' w' o gf kpc" f gpqo kpcf c" Crcunep" gp" 4242" *xgt" Vcdrc" KK/5+0'

Gráfico II-5 - Producción por empresas de vehículos utilitarios livianos en Argentina (unidades) (1997-2019)⁹⁵

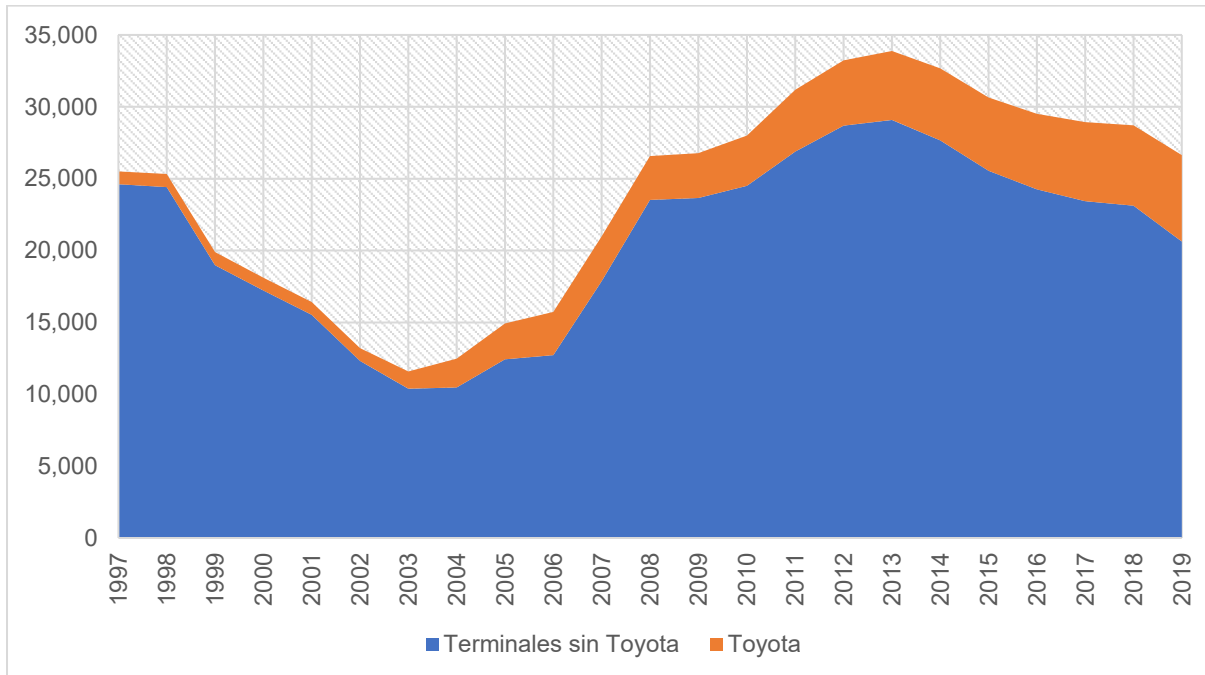


Hwpgv<grdqtcck>p'r tqr kc"gp"dcug'c"CF GHC'

Ceqo r c° cpf q" gn' plxgn' f g" r tqf week>p." gn' go r ngq" gp" Vq{qvc" wo dk&p" etgek>" uquvplf co gpv'f guf g'gn'kplek'f g"uwu'qr gtcekkp'g'u'xgt'I tª hleq"KK8-0'Nc"go r t'guc"eqo gp| >>" g'zr rkecpf q'gn'6' "f gn'go r ngq'v'v'gn'rc'tco c.'r cucpf q'cn'32' "gp"4225."36' "gp"4235."39' "gp" 4237"{"h'p'ck' cpf q"gp"423; "eqp"gn'45' "f gn'v'cdclq"gp"gn'ugevqt"v'gto k'p'cn'0'Rct'kewrto gpv'."gn' etgek' k'p'v'f gn'go r ngq"gp"Vq{qvc"ug'f k'f'g'hqto c"eqp'tce'f'ek'c"eqp"gn'o q'x'k' k'p'v'f gn'ugevqt" gp"uw"v'v'ck'f'c'."{c's'wg'g'ug'ec{ >>"uquvplf co gpv'c'r ct'v'k'f'g"4235."eqp"rc't'geguk>p'f'g'Dtcukn" o k'p'v'cu's'wg'Vq{qvc'cwo gp>>"uw'p'À' gtq'f'g'tcdclcf qtgu'f w'c'p'v'f'lej q'r gt'f'q'f'q'xgt'I tª hleq'2/ 5'f gn'c'pgzq'G'uc'f'f'ur'ek'q-0'

⁹⁵ J' c'uc'423: "CF GHC"eqpuk'gt>"c'rc"Vq{qvc"UY 6"eqo q"wp'xgj'f'ewu'w'w'k'ct'k'q'0'Gp"v' to k'p'qu'f'g'j' qo q'ni' cel'p"g" ko r qu'k'x'qu'rc"UY 6"u'go r t'g'hw'g'wp'xgj'f'ewu'f'g'r'cuclgt'qu'{"CF GHC"eqtt'ki k'g'ug'gtt'qt"gp"423: 0'Gp"nu'I tª hlequ' KK7"{'2/3'f gn'c'pgzq.'gn'c'w'qt'eqtt'ki k'g'ug'f'c'v'q'r'ctc'v'q'f'qu'nu'c'° qu'0'

Gráfico II-6 – Empleo en el sector terminal de la industria automotriz de Argentina (promedios anuales) (1997-2019)



Hwpgv-gndqtckp'r tqr kc'gp'dcug'c'QGF G.'Tgxkuc'O gtecf q'f' f qewo gpvckp'kpvtpc'f'g'Vq{ qvc0

"

F g'hqto c'uko krc't'ug'r wgf g'uwdtc{ ct'nc'vc{ gevqtk'f'g'nc'hko c'lcr qpguc'qdugtxcpf q'gn' xcmqt'f'g'm'rtqf wekf q'gp'gn'r gt'qf q.'gu'f gekl.'vpgkpf q'gp'ewgpc'gn'pAo gtq'f'g'xgj 'ewqu' r tqf wekf qu'{"m'u'r tgekqu'f'g'2 uqu0'Gp'g'4224'{"423; "Vq{ qvc'cewo w»'wpc'r tqf wek»p'f'g' w&u770485'o kmppgu.'wp'xcmqt'eqpuk'gtcdngo gpv'uw'gtkqt'cn'crecp| cf q'r qt'nc'hko c'wdkefc'gp' gn'lgi wpf q'w'i ct.'Xqmuy ci gp.'8's w'iq'j k q'r qt'w&u620623'o kmppgu'9'*xgt'I t'a hkeq'KK9+0"

C"uw'xgl.'guv'tgeqttkf q'ug'f gpvc'gp'gn'r tqpwpekf q'cuegpuq'gp'nc'eAr w»'geqp»o kec' cti gpvpc'c'r ct'vt'f'g'wp'cwo gpvq'etgekpgv'f'g'nc'r'rtqr qtel»p'f'g'nc'u'xgpvcu'f'g'Vq{ qvc'uqdtg'nc'u' xgpvcu'f'g'nc'u'422"go r tguco'o a u'i tcpf gu'f'g'Cti gpvpc'*xgt'I t'a hkeq'KK: +0'Gp'guv'cur gevq.' Vq{ qvc'rkf gtc'c'nc'u'vgtto kpcgu'cwqo qv'legu'c'r ct'vt'f'g'42390'C"uw'xgl.'gm'ug'tghgic'gp'gn' xgt'vi kpquq'cuegpuq'f'g'nc'hko c'gp'f'kej q'tcpnkpi .: "gp'gn'ewcn'eqo gp| »'gp'gn'r wguv'326'eqp'gn'

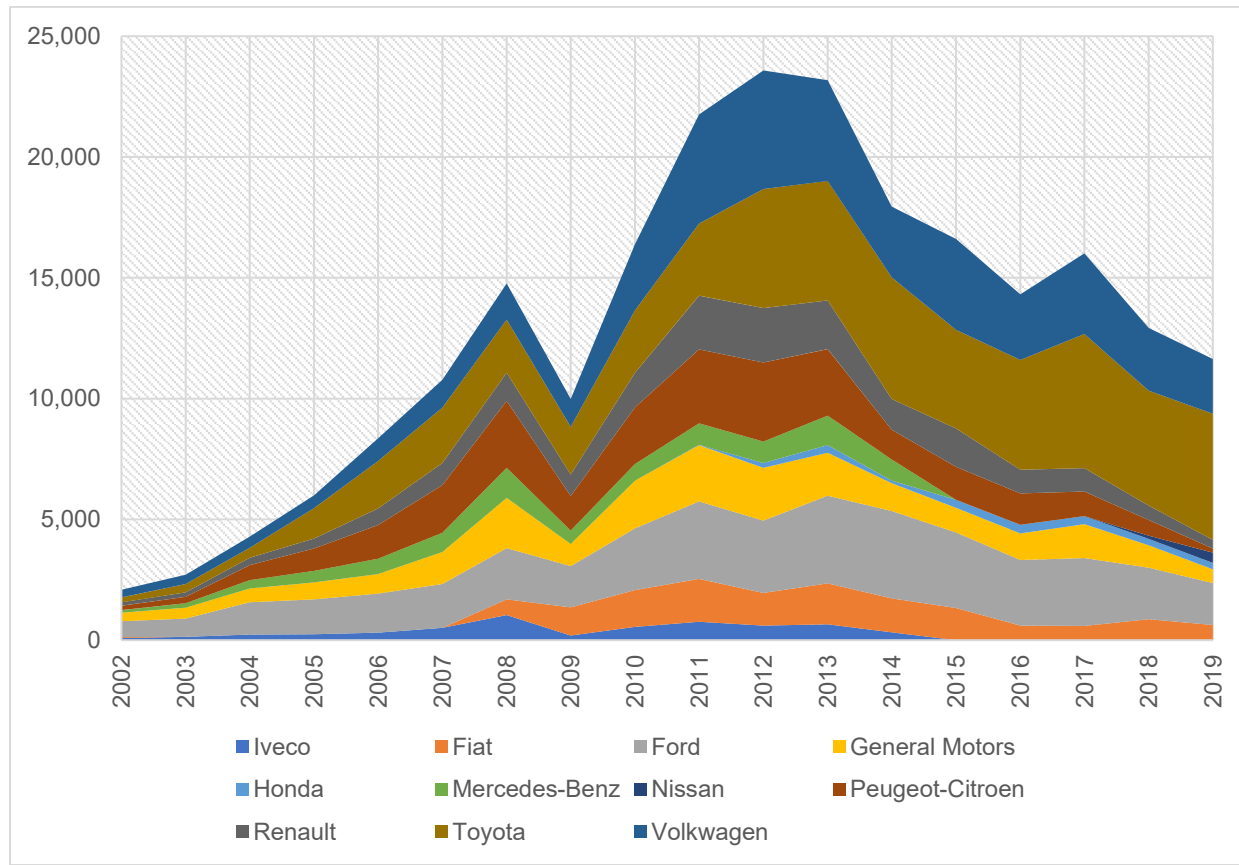
:8"Ug'vkgp'gp'ewgpc'nc'r'rtqf wek»p'f'g'eclcu'f'g'eco dlq'f'g'Xqmuy ci gp'gp'dcug'c'nc'uw'o c'f'g'nc'u'g'zr qt'wekppgu'f'g' 2 ucu'c'iq'r tqf wekf q'gp'xgj 'ewqu0"

:9"Gr'xcmqt'f'g'xgj 'ewqu'r tqf wekf qu'ug'gu'ko c'c'r ct'vt'f'g'ecrewn'gn'r tgekq'gp'r gu'f'g'ecf c'o qf gm'r tqf wekf q'r qt' ecf c'vgtto kpcn'gp'lw'k'f'g'ecf c'c'o q'ugi Ap'nc'i w'p'q'hkcl'f'g'r tgekqu'f'g'CECTC" *eqpuwncf c'c'r ct'vt'f'g' y gd0tej kxg0ti +clwv'f'q'r qt'gn'r tqo g'f'k'cpwcn'f'gn'vr q'f'g'eco dlq'f'g'gn'f'»rc't'guvcf qwpk'gpug'f'gn'DETC'uw'o cf q' c'nc'u' g'zr qt'wekppgu' f'g' cwqr ct'vgt' f'g' ecf c'vgtto kpcn' cwqo qv'k' cti gpvpc0' Rctc' co r rict' eqpuwnc' P qvc' O gxf q»i kec'4'f'gn'CPgzq0'

: "Ug'v'c'f'gn'cpnkpi 'f'g'nc'Tgxkuc'O gtecf q's w'eqphqto c'wpc'dcug'f'g'nc'u'422"go r tguco'o a u'i tcpf gu'f'gn'r c'f'f'g' cewgt'f'q'eqp'uw'gur gev'x'cu'xgpvcu'cpwcn'p'q'ug'kpcnw' gp'hko cu'f'gn'ugevt'ci tqr gev'ct'kq.'lcrxq'nc'u'edqecf cu'c'nc' eqo gtekrk' cel»p'f'g'i tcpqu0'

kplekq'f'g'uwu'qr gtcekppgu'gp'3; ; 9"{'mgi »'c'ugt'rc'vgtetg'go r t guc'o a u'i t c p f g'f'g'rc'Cti gpvpc'
 gp'423; . 'wde' a p f q u g'f' g d c l q'f'g'rc'u'g u c v r g u' c e k o k p v q u' R g t q u' f g t q u' C t i g p v p c' * [R H' { ' D c p e q'
 P c e k » p' C t i g p v p c' * D P C + ' * x g t' V c d r' K 3 + 0 F g' h q t o c' u k o k r t. ' g p' 4 2 3; ' m g i » ' c' g z r d e c t' g n' 5 3' "
 f'g'rc'u'xgpvcu'f'g'vqf'cu'rc'u'vgt o k p c r g u' c w q o q t k e g u' { ' g n' 4. 6' ' f' g n' v q c n f' g' r c' u' 4 2 2' g o r t g u c u' o a u'
 i t c p f g u' f' g' C t i g p v p c' * x g t' I t a h e q' K K: + 0'

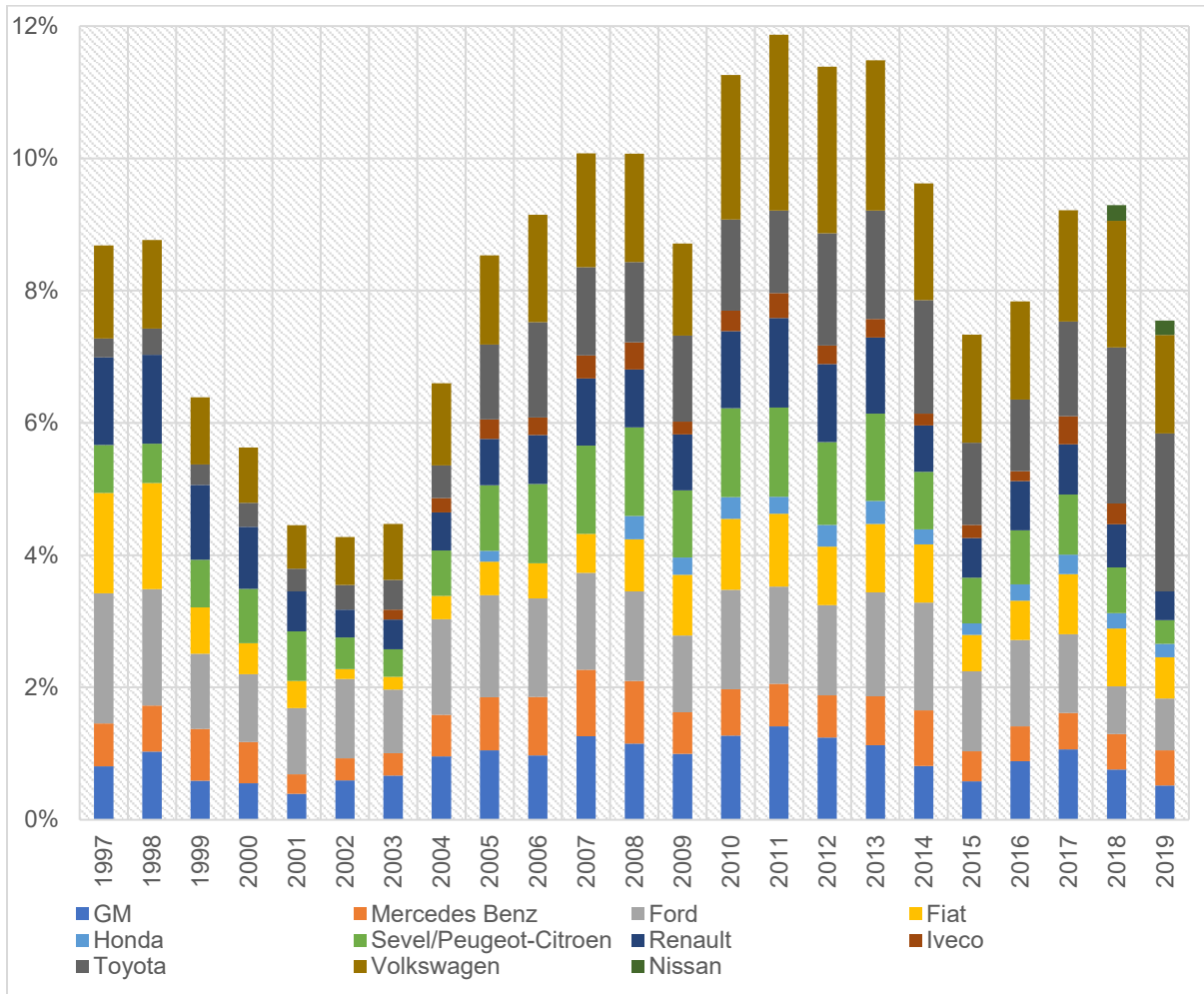
Gráfico II-7 - Valor de vehículos producidos por terminal automotriz⁹⁹ (millones de dólares corrientes) (2002-2019)



Hwpgv<gndqtcek»p'r tqr k'gp'dcug'c'CF GHC.'CECTC' { 'DETCO'

::'Rctc'co r rict'equuinct'P qv'O gvf qn»i kec'4'f'gn'cpgzq0'

Gráfico II-8 - Porcentaje de ventas de las terminales automotrices sobre las ventas de las 200 empresas más grandes de Argentina (porcentajes) (1997-2019)



Hwpgv<gndqtcel>p'r tqr kc'gp'dcug'c'Tgxkvc'O gtecf q0'

Tabla II-1 - Posición de Toyota en el ranking de las 200 empresas más grandes de Argentina (años seleccionados)¹⁰⁰

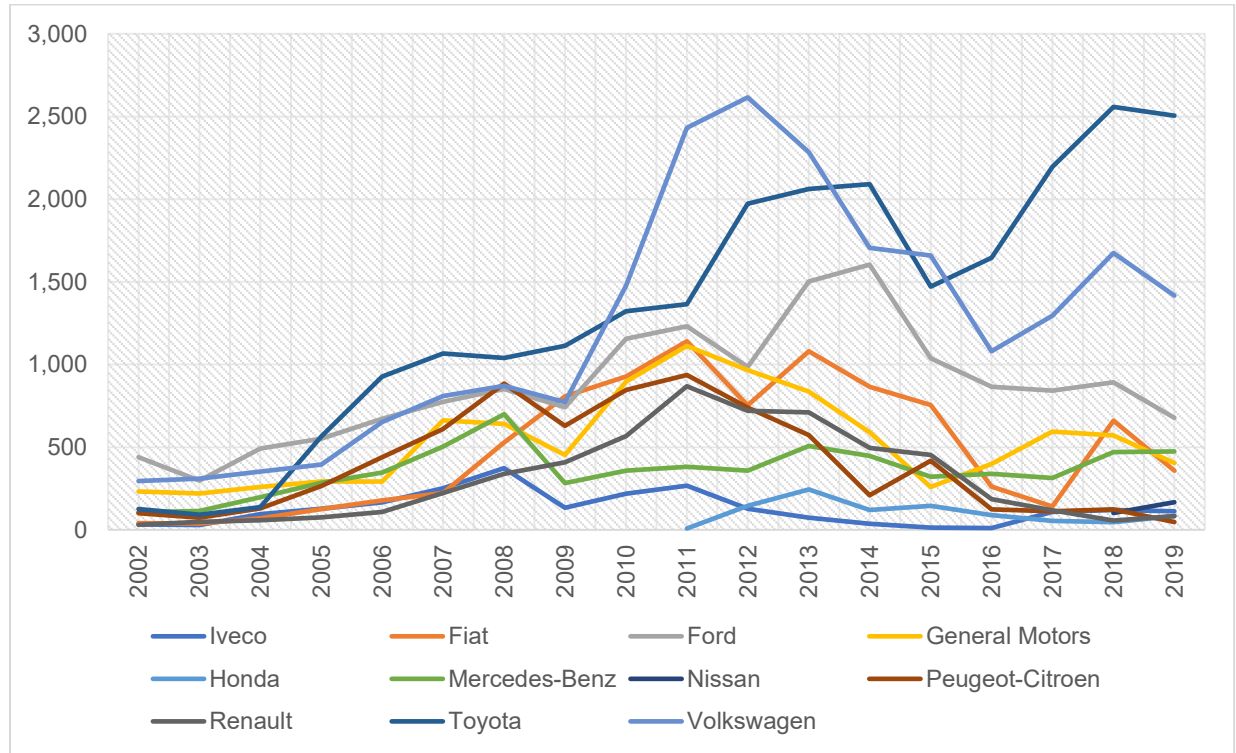
Año	Posición en el ranking
1997	104
2000	81
2005	16
2010	17
2015	17
2019	3

Hwpgv<Tgxkvc'O gtecf q0'

³²²Rctc'xgt'hc'tc{ gevqtk'eqo r ngv'f g'Vq{ qvc'gp'gnlcpnpi 'xgt'hc'Vcdrc'2/4'f gn' Cpgezq'Gucf'¶nleq0'

Qxtq "f g" rqu" cur gevqu" uclpvgu" f g" r" vtc { gevqtk "f g" Vq { qvc "gu" gn' tghgkf q "cn' eqo gtelq" gzvgtkt0' Cn' t' gur gevq. "r" go r t' guc "hwg" r" s' wg" o " a u" g' z' r' qt' v' c' k' p' p' u" r' t' q' f' w' l' q" g' p' v' t' g' "4224" { "423; " n' g' i' c' p' f' q' "c" e' q' m' e' c' t' "r' t' q' f' w' e' v' u" g' p' "g' n' g' z' v' t' c' p' l' g' t' q" r' q' t' "w&u460474" o' k' m' p' p' u" *x' g' t' "I t' a' h' e' q' "K; #0' G' p' u' g' i' w' p' f' q' h' w' i' c' t' . "u' g' "g' p' e' w' g' p' v' t' "X' q' m' y' c' i' g' p' "s' w' g' "c' r' e' c' p' | » "w&u440; 6' b' o' k' m' p' p' u" { "g' p' "v' g' t' e' g' "h' w' i' c' t' "H' q' t' f' " e' q' p' " w&u3708: 2" o' k' m' p' p' u' 0' G' n' t' g' u' q' " f' g' " r' c' u' " v' g' t' o' k' p' c' r' u' " c' w' q' o' q' t' k' e' g' u' " g' z' r' n' e' c' p' " o' q' p' v' u' u' k' i' p' h' e' c' v' x' c' o' g' p' v' g' o' g' p' q' t' g' u' "g' p' "g' z' r' q' t' v' c' e' k' p' p' u' 0' G' p' "e' w' c' p' v' q' "c' "r' "f' k' x' g' t' u' k' h' e' c' e' k' p' "f' g' "u' w' i' o' g' t' e' c' f' q' u' " g' z' r' q' t' v' c' d' r' u' "c' "r' c' t' v' k' "f' g' n' "p' f' l' e' g' "f' g' "J' g' t' h' k' p' f' c' j' n' i' g' "J' k' t' u' e' j' o' c' p' "K' J' + "g' p' "g' n' e' w' c' f' t' q' "K3. 323 "Vq { qvc "p' q' " c' r' c' t' g' e' g' "e' q' o' q' "r" go r t' g' u' c' "e' q' p' o' c { q' t' "f' k' x' g' t' u' k' h' e' c' e' k' p' "f' g' "f' g' u' k' p' q' u' { "c' "s' w' g' "g' p' v' t' g' "r' u' "c' o' q' u' "422; { " 4237 "u' w' i' o' g' z' r' q' t' v' c' e' k' p' p' u' "g' u' w' x' k' g' t' q' p' "h' w' g' t' v' g' o' g' p' v' g' "e' q' p' e' g' p' v' t' c' f' c' u' "g' p' "D' t' c' u' k' t' 0' U' k' p' "g' o' d' c' t' i' q' . "g' p' "r' u' q' u' "A' n' k' o' q' u' "c' o' q' u' "i' g' p' g' t' » "p' w' g' x' q' u' "f' g' u' k' p' q' u' "f' g' "g' z' r' q' t' v' c' e' k' p' "h' w' g' t' c' "f' g' n' "O' g' t' e' q' u' w' t' "v' c' r' u' "e' q' o' q' "R' g' t' A' " E' q' m' o' d' l' c' { "E' j' k' g' . "t' g' u' r' g' e' v' x' c' o' g' p' v' g' . "f' k' x' g' t' u' k' h' e' c' p' f' q' "g' p' "i' t' c' p' o' g' f' k' f' c' "u' w' i' o' g' t' e' c' f' q' u' o' " " " " "

Gráfico II-9 - Exportaciones de terminales automotrices (millones de dólares FOB) (2002-2019)



Hwpgv-g'ndqtcelp'r tqr k'gp'dcug'c' Cf wpc' { "Uqhtcf g0'

323 "Gn' K' J "gu" wpc" o' gf k' c' s' w' g' "k' p' p' "r" r' t' q' r' k' f' c' f' "f' g' "r' q' p' f' g' t' c' t' "g' n' r' g' u' q' "f' g' "e' c' f' c' "r' t' q' f' w' e' v' u" { "r' c' "i' "g' p' "g' n' "v' c' i' l' "f' g' n' " e' q' o' g' t' e' l' q' . "f' g' "o' q' f' q' "s' w' g' "k' p' h' t' o' c' "u' q' d' t' g' "r' "e' q' p' e' g' p' v' t' c' e' k' p' "g' e' q' p' » o' l' e' c' "f' g' "w' p' o' g' t' e' c' f' q' "J' k' t' u' e' j' o' c' p' . "3; 86-0' G' u' v' u' "u' g' " k' f' g' p' w' h' e' c' "c' i' l' "v' o' c' t' "g' n' e' w' c' f' t' c' f' "f' g' "r' u' "r' c' t' v' e' k' r' c' e' k' p' p' u' "f' g' "e' c' f' c' "r' c' "u' w' p' "p' f' l' e' g' "g' n' g' x' c' f' q' "g' z' r' t' g' u' c' "w' p' o' g' t' e' c' f' q' o' w' l' " e' q' p' e' g' p' v' t' c' f' q' { "w' p' "d' e' l' q' "w' p' q' "f' k' x' g' t' u' k' h' e' c' f' q' 0' R' c' t' c' "o' r' n' c' t' "f' k' e' j' c' b' g' v' q' f' q' m' i' "c' "x' g' t' "r' "P' q' v' c' "O' g' v' q' f' q' n' i' k' e' c' "3' f' g' n' i' C' p' g' z' q' 0'

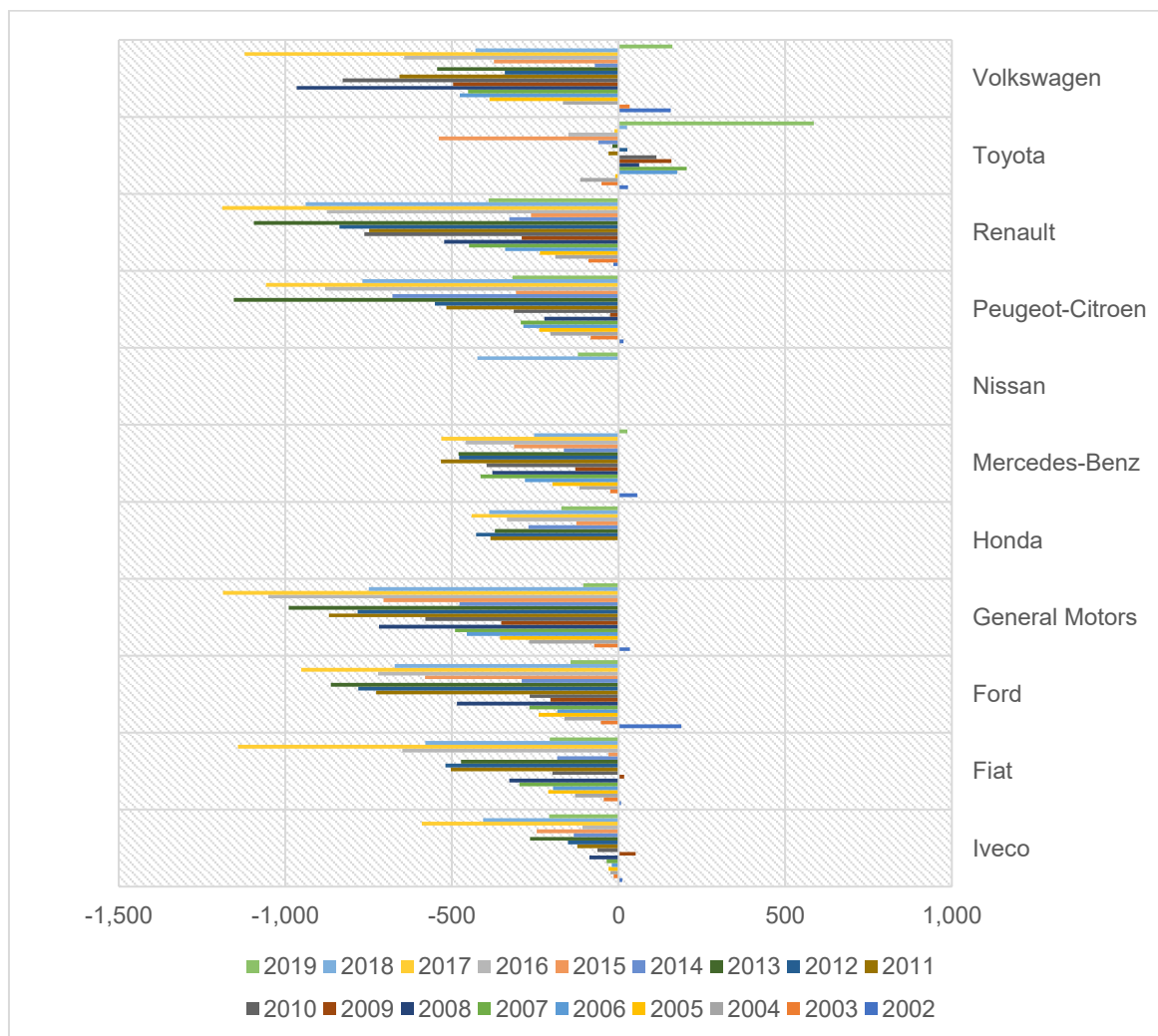
Cuadro II-1 - Índice IHH de concentración de destinos de exportación por terminal automotriz (2002-2019)

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
IVECO	8.153	6.159	3.957	3.930	5.509	3.882	4.688	3.547	4.891	4.756	4.678	4.367	4.120	3.455	4.992	7.092	7.639	8.451
FIAT	6.986	6.950	6.414	4.347	5.100	6.565	7.360	9.472	9.292	9.612	9.093	9.637	8.842	3.484	8.730	9.701	9.765	9.569
FORD	5.867	4.966	4.531	3.619	3.584	3.907	5.014	6.038	6.243	6.778	6.805	6.243	6.377	5.400	4.739	4.881	5.394	4.864
GENERAL MOTORS	3.485	3.844	4.331	3.064	3.854	6.794	8.752	9.128	9.006	8.803	9.579	9.621	9.908	9.773	9.837	9.715	9.772	9.670
HONDA										9.787	9.913	9.701	9.550	9.129	9.216	8.607	8.179	9.508
MERCEDES-BENZ	2.879	2.025	1.501	1.388	1.417	1.059	1.102	3.101	2.717	3.984	6.187	6.559	7.527	5.049	4.340	5.178	5.186	7.702
NISSAN																	8.402	9.176
PEUGEOT CITROEN	4.760	2.647	2.760	2.737	3.879	4.495	4.799	7.939	8.423	8.243	8.498	9.382	9.355	3.255	8.325	7.852	7.861	6.085
RENAULT	5.406	3.338	2.201	2.540	2.203	3.751	5.304	6.454	6.472	6.721	7.564	7.430	6.776	5.230	5.180	4.014	3.660	2.833
SCANIA	4.869	5.257	9.367	9.715	9.050	8.827	9.165	9.426	9.630	9.491	9.165	9.686	9.261	6.308	6.738	7.548	8.428	7.653
TOYOTA	8.360	5.356	3.730	3.384	3.625	3.809	5.891	7.736	7.653	8.448	6.260	7.361	7.541	7.517	6.593	3.653	3.494	3.610
VOLKSWAGEN	3.587	3.569	2.724	2.592	3.128	3.532	4.292	6.672	3.682	6.580	3.441	3.357	3.086	1.982	1.702	2.529	3.040	3.751

Hwpgv-gndqtcklp'r tqr k"gp"dcug"cf cxqu"fg"Cf wpc"{"Uqhtcf g0

" Ulp'go deti q.'gnitcui q'b^a u'lo r qtvcpg'gp'gn'ewcnlug'f guceec"Vq{ qvc'gu'lw'ucrf q'eqo gtekn' gp"eqo r ctce»p"eqp'gn'tguvq'f g'rcu'vgo kpcrgu"cwqo qv'legu"*xgt"l t^a hleq"K32+0Gp"ghgevq."rc" hto c'gu'rc"Àplec's wg'qdwvq'wp't guwncf q'uw'gtcxkctkq'gp'rc'f hgt gpek"gpvt'g'uwu'gZR qt vcekppgu" g'ko r qt vcekppgu"gpvt'g"4224"{"423; "gn'ewcn'cncp| »"w&u5; 2"o kmppgu'r ctc"vqf q'gn'r gt"qf q'0'Gn' tguvq'f g'rcu'vgo kpcrgu"qdwvq'gtqp"t guwncf qu'f hlekctkqu"s wg"gp"uw"eqplwpvq"uki p hlektqp" w&u7; (8; 2"o kmppgu."crt gf gf qt "f gn'92" "f gn'vqcn'f gn'f² hlek'f gn'ugevqt "f wtcpvg"rc"gvcr c"dclq" guwf kq0Guv'cur gevq'ucrlgpvg'ug'f guceec"çÀp"o^a u'f gdlf q'c'rc'ko r qt vcekc"o cetqgeqp»o kec's wg" vepg"r ctc"Cti gp'vpc"rc" f kur qpklkklf cf "f g'f kxkucu'f cf qu"mü" {c"o gpekqpcf qu'r tqdrgo cu'f g" *restricción externa* *Dtcwp"{"Lq{."3; 8: =Uej qtt"{"Y clpgt."4236="Vj kny cm"3; 9; +

Gráfico II-10 - Saldo comercial externo por terminal automotriz (millones de dólares)* (2002-2019)



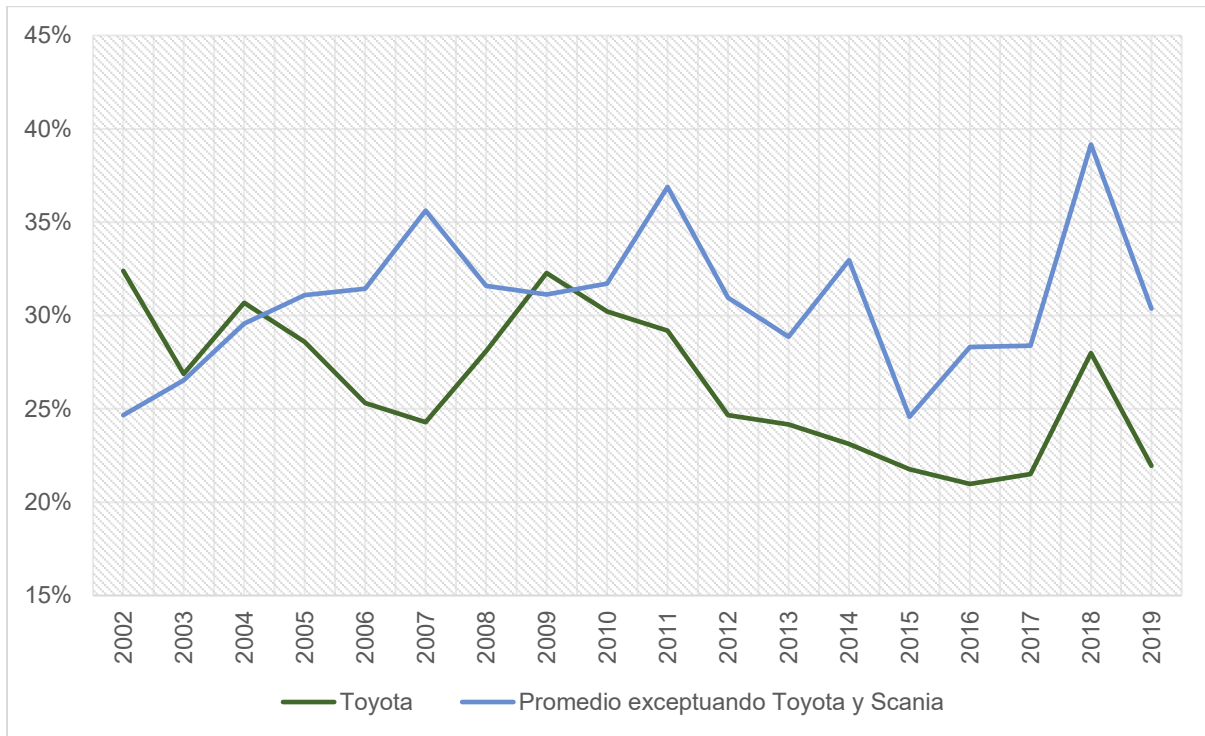
Hwpgvq'gndqtcel»p'r tqr kc'gp'dcug'c'çf wpc"{"Uqlwcf g0' , F »rtgu'HQD'r ctc'gZR qt vcekppgu"{"f »rtgu'EKH'r ctc'ko r qt vcekppgu0'

Guxu't guwncf qu'ug'g zr dcep. "gp'r ctvg. 'r qt 'gn'cng' eqpvpgk q' mecn'f g'mu'xgj 'f wncu'f g' Vq{ qvc0C'r ctvt'f g'nc' gf lek'p'f g'ncu'ko r qt vckppgu'f g'cwqr ctvug'gp'f » rctgu'udt g'gn'cngt'f g' mu'xgj 'f wncu'r tqf wck qu'ug'f gpqc's wg'Vq{ qvc'wnc' » "gp'r tqo gf kq'wp'48' 'f g'ko r qt vckppgu' f g'cwqr ctvug'gp'uwu'xgj 'f wncu'o kcpvcu's wg'gn't guv'f g'ncu'vgo kpcrgu'm'j' kckgtq'gp'53' '*xgt' I t^a h'eq'33+0²⁴' Ncu'f qu'vgo kpcrgu's wg'ug'eqmectq'p'r qt'f gdclq'f g'Vq{ qvc'hwgtq'p'Hqtf "eqp' wp'r tqo gf kq'f g'45' 'f g'ko r qt vckppgu'udt g'gn'cngt'f g'nc' r tqf wek'p' { "Xqmuy ci gp'eqp'47' " *xgt' I t^a h'eq'2/6'f gn'cpgzq'Guxf 'f wncu+0²⁵' Rqt'qvtq'ncf q. 'gung'udt gunc'p'v'g' t guwncf q'eqo gtekn' f g'Vq{ qvc'ug'g zr d'c'co d'k'p'r qt'o gpqtgu'ko r qt vckppgu'f g'xgj 'f wncu'f g'r cuclgtqu'cn'b' gtecf q' cti gp'v'p'q'gp'eqo r cteck'p'eqp'nc'o c{ qt'f'f gn't guv'f g'ncu'vgo kpcrgu'eqo q'Xqmuy ci gp.'Hqtf . " I gp'gtcn'O qvqtu.'Tgp'cwn.'H'c'v' { 'Rgwi gqv'Ek'q'gp.'t'gur g'v'x'co gp'v'g' *xgt' I t^a h'eq'2/7'f gn'cpgzq' Guxf 'f wncu+0

³²⁴"Ecdg'tgo ctect's wg'gung'o ² vqf q'gu'f k'v'p'q'cn's wg'wnc' cp'ncu'vgo kpcrgu.'o k'f k'p'f q'r k'g' c'r qt'r k'g' c0Ugi 'Ap'gung' 'Anko q.'Vq{ qvc'v'p'f'gp'4242'wp'62' 'f g'eqpvpgk q'mecn'gp'uwu'xgj 'f wncu'*F'cpl'gn'J' gtt'gtq.'gp'v'g'x'k'v'c'r'gtu'q'pcn' 394244+0'

³²⁵"C'r ctvt'f g'ncu'etvegu'f g'ncu'xctk'drgu'ko r qt vckppgukcngt'f g'nc'r' r tqf wek'p' { "g'zr qt vckppgukcngt'f g'nc'r' r tqf wek'p'gp'v'g'4224' { "423; 'ug'r wgf gp'xgt'o ^a u'ertco gp'v'ncu'f k'g'g'p'ekcu'gp'v'g'ncu'vgo kpcrgu'*xgt' I t^a h'eq'2/6' f gn'cpgzq'Guxf 'f wncu+0Gp'r ctv'w'ct.'Vq{ qvc.'Hqtf' { "Xqmuy ci gp.'ncu'r t'p'ek'crgu'r tqf w'v'q'cu'f g'r k'nc'w' u'gp'gn' r c'f'u'v'p'g'zr qt v'f'qt'cu'eqp'cng'eqpvpgk q'mecn'uk'p'go d'cti q.'ncu't guwncf qu'f g'nc'f q'eqo gtekn'gp'v'g'g'ncu'*w'u'5; 2" o k'np'p'gu'Vq{ qvc.'/w'u'9062: 'o k'np'o gu'Hqtf' { "o w'u'90827'o k'np'p'gu'Xqmuy ci gp+'tgo cteck'nc'uk'p'i' w'ct'k'f'c'f'f'gn'ec'uc'q' f g'Vq{ qvc.'k'p'ncu'q' h'g'p'v'g'c'g'uc'u'vgo kpcrgu'gp'Cti gp'v'p'c'0'

Gráfico II-11 - Contenido importado de los vehículos¹⁰⁴ en Toyota y promedio del resto de las terminales de Argentina (porcentajes) (2002-2019)



Hvpgv<grdqtcelp'r tqr kc'gp'dcug'c'CECTC.'CF GHC.'DETC'{'CF WPC C0'

"

F g'gung'o qf q.'c'r ctvt'f g'rc'eqo r ctcekp'f gnlf gugo r g° q'f g'ecf c'wpc'f g'rc'u'vgtó kpcrgu" cwqo qvlegu'ug'f gucec'gn'ecuq'f g'Vq{ qvc'Cti gpvkpc'gp'dcug'c'uwu'r qukkxqu'iqi tqv0Gug'2 zkq" uqdtgucrg.'c'uw'xgl.'vpgkpf q'gp'ewgpc'mu'r tqdngo cu'gutwewtcrgu'f gn'eqo r nglq'cwqo qvt" xlpewrf qu'c'uw'f2 hck'eqo gtekn'{"gn'cmq'wuq'f g'cwqr ctvgu'ko r qtvcf cu'{"rc'tgtceekp'f g'rc' kpf wutlc'gpvtg'423: {"423; 0Gug'tgeqtkf q'r wf q'gxkf gpektug'gp'iqu'pkxgrgu'r tqf wvku'f g'rc' hto c.'uwu'xgpvcu.'uw'r qulekp'gp'rc'eÀr wr'geqp»o kec'cti gpvkpc'{'uqdtg'vqf q.'uwu'tguwncf qu' eqo gtekrnu' c' r ctvt' f g' uwu' gsr qtcekp'p'gu.'cmq' eqpvkpf q' mecn' f g' uwu' xgj 'ewnu' {" uwu' uwr gtcxkctkqu'ucif qu'eqo gtekrnu'0Gp'rc'Àplec'f ko gpukp's wg'pq'ug'j cmc'wp'tguwncf q'uw' gkqt" cn'tguv" gu' gp'rc'f kxgtuk'kecekp'f g'uwu'o gtecf qu'f g' gsr qtcekp.'cwps wg'ug' qdugtxc'wpc' co r rcekp'f g'guvqu'f guvqu'gp'iqu'Ànko qu'c° qu'f gnlf gt'qf q'dclq'guwf kq0'

Conclusiones parciales

C"mq'rti q'f g' gung'ecr 'wru'ug'tgeqputw' »'rc'vc{ gevqtk'j kw'klec'f g'rc' kpf wutlc"

³²⁶Rctc'co r rkt'eqpuwnt'P qc'O gqf qn»i lec'4'{'5'f gn'cpgzq0"

cwqo qvkl "cti gpvpc" j cekgpf q"2 phcuku" gp" uuu" ectcevgt "uuecu" i gpgtcrqu" {" uuu" r tqdngo cu" gwtwewtcrqu"r cte" f guvcect"rc"gzegr ekqpcrkf cf "f g"Vq{ qvc" Cti gpvpc0Cu" "ug" f gucttqmtqp"rcu" f kwpvcu" gvr cu" f g"rc" kpf wwtlc" f guf g"uuu" kplekqu"gp"3; 42" j cuvc"rc" etkuku" f g"rc" eqpxgtvdkrkf cf " ug° cncpf q"s wg"rcu"r tqdngo ° vkecu" f gn'cncpeg" f g"uuu" gztvcekqpgu" {" uuu" ucif qu"eqo gtekrqu" {" c" ug" gpeqpvtdcp" r tguvgyu" gp" guvg" tgeqttkf q. "cf go ° u" f g" qvctcu. "eqo q"rc" b" qf gtpk cekp" f gn'ugevqt0 Cp" r ctvewct. "gp"rc" f2 ecf c" f g"3; ; 2" ug" ngx» "c" ecdq" wpc" r tqhwpc" tgeqpxgtukp" f gn'eqo r nglq" s wg" r gto kkw" wpc" b" glqtc" r tqf wvxc" {" "vgepqn" i kec" {" i gpgt» "wpc" ucirkf c" gztvctcf qtc" r cte"rc" tco c" vto kpcn'c" r ctvkl" f g"rc" etgcekp" f gn' b" gtecf q" tgi kqpcn'0Ukp" go dcti q. "f wcpvg" guv" gvr c" vco dl2 p" ug" ci vfk »" gn' f2 hek" eqo gtekn' f gn' eqo r nglq" xkpewrf q" gp" i tcp" o" gf kfc" cn' cwo gpvq" f g"rcu" ko r qvcekqpgu" f g" cwqr ctvqu" r cte"rc" r tqf weekp" f g" xgj "fwrqu0"

Nwgi q" f g"rc" etkuku" f gn' hkp" f g"rc" eqpxgtvdkrkf cf "rc" kpf wwtlc" cwqo qvkl "gztv gto gp» "wpc" hcug" f g" gztv cpukp" gp" v2 to kpu" f g" r tqf weekp. "xgpvcu. "gztv cekqpgu" {" go r ngq0Ukp" go dcti q. " nqu" r tqdngo cu" f g"tkcf qu" f g" uw" dncrp| c" eqo gtekn' {" f gn' cnq" wuq" f g" kpuwo qu" ko r qvctf qu" ug" uquwxkgtqp0C" r ctvkl" f g"rc" cuwpekp" f gn' i qdkgtpq" f g" Eco dlgo qu" c" hkp" f g" 4237. "gn' eqo r nglq" cwqo qvkt "uwtk" w" hwtvgtvgtqegu" f cf q" r qt"rc" tgtceekp" f g" uw" r tqf weekp. "rc" eqpvkpwkf cf "f g" nqu" cnqu" plxgrgu" f g" ko r qvcekqpgu" f g" cwqr ctvqu" {" "rc" cr ctkekp" f g" grgxcf qu" f2 hekku" gp"rcu" r ctvkl cu" f g" xgj "fwrqu" vto kpcf qu. "m" ewcn' ci tcx» "nqu" pgi cvkxqu" ucif qu" eqo gtekrqu" f g"rc" kpf wwtlc0

Gp" dcug" c" f lej q" o" cteq" ug" cpcrkf ctqp" nqu" f gugo r g° qu" f g"rcu" f kwpvcu" vto kpcrgu" cwqo qvtegu" f gpvqpf q" wp" eqo r qvco kpvq" f hgt gpekcf q" gpvtg" gmcu. "gp" gn' ewcn' ug" f guvcec"rc" vtc { gevqtk" f g" Vq{ qvc" Cti gpvpc0Nqu" t guwncf qu" f g" guvg" Ànko q" cp° rkuku" ctqletqp" wp" rkf gtc| i q" f g"rc" hko c" lcr qpguc" gp" nqu" plxgrgu" r tqf wvxcqu. "rcu" xgpvcu. "rc" r qukekp" gp"rc" eÀ wrc" geqp» o" kec" cti gpvpc" {" . "uqdtg" vqf q. "nqu" t guwncf qu" eqo gtekrqu" c" r ctvkl" f g"uuu" gztvcekqpgu. "cnq" eqpvkpwkf q" nqecnf g"uuu" xgj "fwrqu" {" "uuu" uw" gtcxkctkqu" ucif qu" eqo gtekrqu0Guqu" nqi tqv" ug" f guvcecp" f gdlf q" c" nqu" r tqdngo cu" gwtwewtcrqu" f gn' eqo r nglq" cwqo qvkt "xkpewrf qu" c" uw" f2 hek" eqo gtekn' {" "cn' cnq" wuq" f g" cwqr ctvqu" ko r qvctf cu. "eqo q" vco dl2 p. "r qt" gn' eqpvz vq" f g" tgtceekp" f g"rc" kpf wwtlc" gpvtg" 423: {" "423; 0F g" guvg" o" qf q. "gn' ecuc" f g" Vq{ qvc" eqo r tgpf g" wpq" f g" gur gekn' kpvgt2 u" gp" gn' f gucttqm" f g"rc" kpf wwtlc" cwqo qvkl "cti gpvpc" guvcdngekpf q"rc" pgegukf cf "f g" gzc"o kpc"t" nqu" hcvqtgu" s wg" gztv ncecp" guv" vtc { gevqtk0Guvc" vctgc" ug" go r tgpf g" gp" r tqhwpc" kf cf "gp" nqu" r t» zko qu" ecr "fwrqu0

"

CAPÍTULO 3

La incrustación internacional de Toyota Argentina: la formación y el desarrollo de la multinacional Toyota Motor Corporation

Introducción del capítulo

" Gr'r t g u g p v g " e c r " i n c r u s t a c i ó n i n t e r n a c i o n a l " f g " r c " h k r c n ' c t i g p v k p c " f g " V O E 0 R c t c " g u q . " u g " t g x k u c " e » o q " g u v c " g o r t g u c " u g " k p l e k » { " f g u c t t q m » v c p v q " g p " u w " r c " u " f g " q t k i g p . " L c r » p . " e q o q " g p " g n ' t g u v q " f g n ' o w p f q . " r t g u v c p f q " g u r g e k n ' c v g p e k » p " c " r c u " e c t c e v g t " i n k e c u " f g " u w " g u t c v g i k c " g o r t g u c t k n i m d c n i { " c n i h w i c t ' s w g " q e w r c " r c " h k r c n ' c t i g p v k p c " g p " u w " g u t w e w t c " o w n k p c e k q p c n i " F g " g u v g " o q f q . " u g " e q o k p p | c " r c " u g e e k » p " c p c r k i c p f q " g n ' q t k i g p " f g " r c " g o r t g u c " g p " L c r » p " g p " g n ' o c t e q " f g n i e t g e k o k g p v q " g e q p » o k e q " g " k p f w u t k n i f g n i r c " u * 3 . 1 + 0 " N w g i q . " u g " f g v c m p " f q u " e q o r q p p g v g u " g u g p e k r g u " f g " r c " g u t c v g i k c " g o r t g u c t k n i f g " V q { q v c " * 3 . 2 + " r q u " e w c r g u " u q p " u w " u k u g o c " f g " r t q f w e e k » p " * T o y o t a P r o d u c t i o n S y s t e m + * 3 . 2 . 1 + { " g n ' o 2 v q f q " V q { q v c " * T h e T o y o t a W a y + * 3 . 2 . 2 + 0 " G u v q u " g r g o g p v q u " u q p " e g p v t c r g u " r c t c " g p v g p f g t " r c u " e c t c e v g t " i n k e c u " f g " r c " h k t o c " f g u f g " u w " q t k i g p " s w g " f g t q p " h w i c t " c " r c " r t q r c i c e k » p " f g " u w " u k u g o c " c " r c t v k " f g n i h c o c f q " t o y o t i s m o , g n i e w c n i e q p f g p u » " i t c p " r c t v g " f g " m u " e c o d k u " s w g " u g " g u v c d c p " m g x c p f q " c " e c d q " g p " g n i e c r k c r k u o q " o w p f k c n i g p " r c " f 2 e c f c " f g " 3 ; 9 2 0 " C u l o k u o q . " g u v q u " c u r g e v q u " u q p " e t w e k r g u " r c t c " e q o r t g p f g t " r c " g u t c v g i k c " f g " V q { q v c " C t i g p v k p c " f w t c p v g " r c u " A n k o c u " f 2 e c f c u " r t k p e k c m g p v g " u w " r c p k h e c e k » p " c " r e t i q " r n | q { " u w " t g r e k » p " e q p " r t q x g g f q t g u " m e c r g u " }

" G p " g n i u k i w k e p v g " e r c t v c f q " u g " t g e q p u s t w f g " r c " g v c r c " f g " e t g e k o k g p v q " c n i k p v t k q t " f g " L c r » p " n w g i q " f g " r c " K K I w g t t c " O w p f k c n " r c " g z r c p u k » p " f g n i I t w r q " V q { q v c " { " g n i k p e t g o g p v q " f g " u w u " g z r q t v e k q p p g u " c " f k u k p v q u " o g t e c f q u " f g n i o w p f q " * 3 . 3 + 0 " N w g i q . " u g " u k i w g " e q p " r c " h c u g " f g " k p v t p c e k q p c r k i c e k » p " f g " r c " h k t o c " c " r c t v k " f g " r c " k p u v c r e k » p " f g " h k r c r g u " g p " f g h g t g p v g u " r c " f u g u " * 3 . 4 + 0 " G p " g u v c " g v c r c " f g " g z r c p u k » p " g p " o g t e c f q u " g o g t i g p v g u " g u " e w c p f q " V q { q v c " u g " k p u v c r e " g p " C t i g p v k p c 0 " C " t c " f " f g " g m q . " u g " t g c r k i c " w p c " e c t c e v g t k i c e k » p " f g n i t q n i f g " e c f c " u w d u k f k e t k c " c " r c t v k " f g n i c o q " f g " t c f k e c e k » p . " g n i e c t a e v g t " l w " f l e q . " g n i v r q " f g " d k e p " r t q f w e k f q . " h c u " t c | q p p u f g " r c " k p u v c r e k » p " { " g n i p k x g n i f g " r t q f w e e k » p " g p v t g " 4 2 2 ; " { " 4 2 3 ; 0 " U g i w k f q " c " g u v q . " u g " f g u e t k d g " r c " g v c r c " f g " e q p u q r k f c e k » p " f g " V q { q v c " e q o q " w p c " h k t o c " o w n k p c e k q p c n i " * 3 . 5 + " g p " d c u g " c n i c p a r k u k u " f g " r c " r t q f w e e k » p " g p " r c u " f k u k p v c u " t g i k q p p u " f g n i o w p f q { " r c " t g e q p u s t w e e k » p " f g " r c " t g f " f g " c e e k q p k u c u " r t k p e k r c r g u " f g " r c " h k t o c " n w g i q " f g " u w " k p e n u k » p " g p " r c u " d q n u c u " f g " P w g x c " l q t n i { " N q p f t g u 0 }

" R q u v t k q t o g p v g . " u g " c p c r k i c " g n i r t q { g e v q " k o p p x c e k » p " k p v t p c e k q p c n i f g " X g j " f e w r q u " O w n k r t q r » u k q " * K O X + " r c p | c f q " r q t " r c " g o r t g u c " c " p l x g n i m d c n i g p " 4 2 2 4 " * 3 . 6 + " g p " g n i e w c n i r c " h k r c n i

cti gpvpc"vkgpg"wp"tqn'r tgr qpf gtcpg0Nc"glgewek»p" f g"guvg"r rcp"gu"wp"lcevtq" f gygto kpcpvq" f gn' r cr gn' f g"rc" Cti gpvpc"gp"rc" guv wewtc"o wmkpcekqpcn' f g"Vq{ qvc"gp"ewcpvq" c"uw"gur gekcrk cek»p" r tqf wevxc. "r guq" f gn' o gtecf q" kpvgtpq. " guvdrgek kgpvq" f g" o gtecf qu" f g" gzi qtveck»p. " eqo q" vco dk p. "r qt"rc" h'ckek»p" f g"rcu'r rcpvcu'r tqf wevxcu's wge'eqo r kgp"eqp" Cti gpvpc"cn'kpvgtkq" f g"rc" o wmkpcekqpcn'Rqt"Ànko q. "ug"cpcrik c"gn' f gugo r g° q" f g"rc" go r tguc"hwgi q" f g"rc"etkuku" f g"422: / 422; " *3.7+" eqo r ctª pf qrc" eqp" gn' tguvq" f g" rcu" hto cu" cwqo qvlegu" ugi Àp" uwu" kpi tguqu" { " r tqf week»p" i mdcrgu0Cf goª u. "ug"gzco kpc"s w² "tqn'wxkgtqp"rcu' f kwpvcu'tgi kppgu" f gn' o wpf q"cn' kpvgtkq" f g"rc" qti cpk cek»p"gp"ewcpvq" c"xgpvcu" { " r tqf week»p" hwgi q" f g"rc"etkuku" i mdcrf" " "

3.1. - Los inicios de Toyota en Japón (1890-1939)

Nc"j kvqtkc" f g" Vq{ qvc" O qvqt" Eqtr qtcvqpp" eqo kgp| c" eqp" gn' guvdrgek kgpvq" f g" wpc" r gswg° c" go r tguc" hco krc"t "vgz vk'r qt" r ctvg" f g" uw"hwpcf cf qt. "Ucnkej k"Vq{ qf c0³²⁷³²⁸"Gri² zkvq" f gn' go r tgp f ko kgpvq" eqo gp| »"gp"3: ; 3" c" r ctvk" f g"rc" etgckek»p" f gn'vgrt" f g" b cpq" f g" o cf gtc" Vq{ qf c" *Toyota wooden hand loom+ wp" kppqxcf qt" vgrt" s wg" r gto kpc" eqphgeekqpc" r tqf wevqu" vgz vk'gu" eqp" wpc" uqrc" o cpq0Nwgi q. "gp"3: ; 8" o glqt»" f lej c" kpxgpek»p" cn' f gucttqnc"t" gn'vgrt" o geª pleq" Vq{ qf c" *Toyota power loom+ gn'r tko gt" vgrt" o geª pleq" f g" Lcr »p0C" r ctvk" f g" gmq. "rc" go r tguc" hw"etgekpf q" c" wp" tko q" cegrctcf q. "cuqekª pf qug" eqp" qv'cu" hto cu" lcr qpguc" { " co r rcpf q" uwu" r rcpvcu" o cpw'cewtgtcu0Rquvgtkqto gpvg. "lwpvq" c" uw" j klq. "Mkej kq" Vq{ qf c.³²⁹ f gucttqnc"tq" eqplwpc" gpvg" gn'vgrt" cwqoª vkeq" Vq{ qf c" *Toyota automatic loom+ m'j tcpf q" cwqo c'v' ct"rc" r tqf week»p" f gn'vgrt0Gp"dcug" c" guvqu"cxcpogu. "rc" go r tguc" hw"eqpuki wkepf q" o c { qtgu"² zkvq" { " gp"3; 48" guvdrgekgtqp"rc" hto c" Vq{ qf c" Cwqo c'v' Nqgo "Y qtmu. "Nf 0²: "Vq{ qvc. "4234+0

Rctcgrco gpvg" c" guvqu" r tko gtqu" r cuqu" f g" Vq{ qvc. " gp" 3; 42" Lcr »p" eqo gp| cdc" c" ko r ngo gpvct" uw'r qm'lec" kpf wutkrc'no qf gtpc" *Laj puqp. "3: ; 4+0²: "Uk" go dci q. "rcu" go r tguc" oª u"

³²⁷ "Ucnkej k"Vq{ qf c. "gn'hwpcf cf qt" f g" Vq{ qvc" kpf wutkcu" Eqtr qtcvqpp. "pck»" gp"3: 89" gp" gn'r wgdng' twcnf' g' l' co ci wej k' *cj qtc' r ctvg' f g"rc" ekw' cf' f g" Mquck+ gp"rc" r tghewtc' f g" Uj k' wqnc" { " gtc' j klq' f g" wp' ectr kpvgtq" *O ci gg. "4229=Vq{ qvc. " 4234+0

³²⁸ "Guq" ug" eqp'vcr qpg" cn' kplekq" f g"rc" r tko gtc" go r tguc" cwqo qv'k' lcr qpguc. "O kuwdukj k"rc" ewen'r tqxgp" f g" m'j i tcpf gu" i twr qu" go r tgu'ctkrcgu" lcr qpgugu" eqp'qek' qu" eqo q" zaibatsu, m'j ewergu" gtc" eqp'vcr q' r qt" r qf gtqcu" hco krcu" s wg" f qo kpcdcp"rc" geppqo " f lcr qpguc" { " hwgtqp" egp'vcr gu" gp" uw" r tqeguq" f g" kpf wutkrc'k cek»p" *Eqttgc" Tgutgr q. "4238= Rgtgl " C'm cpuk" 4242c+0Nqu" f gpqo kpcf qu" ðewvtq" i tcpf gu" i twr qu" gtc" O kuwdukj k" O kuwk" Uwo kqo q" { " l' cuw' c" *Igpucpc. "4226+0"

³²⁹ "Rctc" co r rict" uqdtg"rcu" r t'pckr crgu" cwqtkf cf gu" f g" VO E" eqpuwnc"t" gn'rkucf q" etqppq»i leq" gp"rc" "Vcdrc" 2/5" f gn' Cpgzq" Guvcf " l' n'eq0

^{32:} "S wg" hwgi q" ug" eqp'xgtvk" f g" gp" Vq{ qvc" kpf wutkcu" Eqtr qtcvqpp0

^{32:} "Ej cm gtu" Laj uqp" *3: ; 4+ " guw'f kquq" f gn' milagro económico" lcr qp² u' eqo q" gn'r tko gt" ecuaq" f g" kpf wutkrc'k cek»p" vctf " f " r kppgtq" f g"rc" rkg'c'wtc" uqdtg" gn' Estado desarrollista. "uqu'kpgg" s wg"rc" ko r ngo gpvckek»p" f g"rc" r qm'lec" kpf wutkrc' lcr qpguc" o qf gtpc" eqo gp| »" gp"rc" f² ecf c" f g"3; 42" eqp"rc" kpv'qf week»p" gp" lcr »p" f gn' eqpegr vq" f g" racionalización industrial. "gn'ewcn'ug" dcu»" gp"rc" t'cekqpcn'k cek»p" kpf wutkrc' crgo cpc0Guc" r qm'lec" ug" egp'v'cdc" gp"rc" kppqxcckek»p" v'gepqn' i lec. "rc" kpu'rc'ckek»p" f g" oª s w'pvcu" { " gs wkr qu" oª u' o qf gtpqu" { " o gf k' cu' i gp'gtcrgu" r ctc" cwo gpvct"

dgpghlekfcu"r qt" guvcu" o gf kfcu" gtcp" rcu" r gtvgpgekpvcu" c" rqu" eqpi mo gtcf qu" go r t guctkqu" lcr qpugu. "eqpkef qu" eqo q" zaibatsu, r qt" rqu" vcpvq. "Vq{ qvc" pq" hwg" qdlgw" f k gevq" f g" f lej cu" r qn" lecu" f g" kpf wutkrc k cek»p0" C" uw" xgl. "f wtcpvg" guvc" f² ecf c" gn' vgttgo qvq" f g" I tgev" Mcpvq" f guxt w{ »" rqu" hgttqecttkrgu" gp" i tcp" r ctvg" f g" Lcr »p" f cpf q" nwi ct" cn' etgeko kpvq" f gn' wuq" f g" cwqo »xkrgu" { "eco kppgu0Guv" cwo gpvq" f g" r' f go cpf c" f g" xgj ¶ewru" gtc" ewdkgvq" gp" uw" vqcrk cf" r qt" ko r qtvekpogu" f guf g" Guvcf qu" Wpk qu" ew{ q' ukvgo c" f g" r tqf week»p" gp" o cuc' ru' j ce¶c" o wej q" o^a u" eqo r gkxku" s wg" rcu" gwtqr gcu. "r qt" rqu" vcpvq. "c" o gf kfcu" f g" r" f² ecf c" f g" 3; 42" Hqtf " { " I gpgtgn' O qvqu' kpuvcrtqp" uw' r rvcu" f g" gpucio drcf q" gp" Lcr »p" *J qny gi. "4229-0"

Rqt" uw' r ctvg. "gr² zkv" f g" rqu' vgrtgu" cwqo^a veku" Vq{ qf c" uki wk" cwo gpvcpf q" f g" hqto c" vcn' swg" gzegef kgtqp" c" Lcr »p" { " gp" 3; 4; " ecr kcrqu" f g" I tcp" Dtgv c" egttctqp" wp" cewgtf q" r ctc" r" vcpuhgtgpek" f g" r cvpvgu" eqp" r" go r t guc" lcr qpgu0" Gp" gn' o cteq" f g" guvc" pgi qekcekp" Mkej kq" Vq{ qf c" eqo gp| »" c" xkclct" c" I tcp" Dtgv c" { " Guvcf qu" Wpk qu. "cf gpt^a pf qug" gp" gn' f gucttqmq" f g" r" kpf wutk" cwqo qvtk" gp" guvqu' r c¶gu" { ' eqpxgpek' pf qug" f g" r' pgeguk cf" f g" uwko r wuq" gp" Lcr »p" *Vq{ qvc. "4234-0" Cu¶" gp" 3; 55" ug" cdtk»" wp" f gr ctwo gpvq" f g" cwqo »xkrgu" f gptq" f g" Vq{ qf c" Cwqo cve" Nqgo " Y qtmu. " gn' ewcn' ug" f gf le»" c" guwf kct" g" ko kct" rqu" f kug^o qu" f g" rqu" xgj ¶ewru" guvcf qvpk gpugu" { " c" tgenwct" vtdclcf qtgu" eqp" gzr gkgepek" gp" r" kpf wutk" cwqo qvtk" *LONkmt. " 4225-0"

Gp" 3; 52" gn' f gucecf q" O kpkvgtkq" f g" Ego gtekq" kpvtpcekqpcn' g" kpf wutk" *Ministry of International Trade and Industry. 'O KVK' f gn' qdkgtpq" lcr qp² u' r t gupv»" wp" r rcp' r ctc" f gucttqmt" r" kpf wutk" cwqo qvtk" " mecn' s wg" ug" f kki ¶c" c" rko kct" gn' eqpvtqn' gz vcp lgtq" gp" gn' ugevq" { " tgf vekt" gn' f² hek' eqo gtekn' { " eqpuku¶c" gp" gn' qvqi co kpvq" f g" r' kgepekcu" gur ge¶kecu" r ctc" r" hcdtkecek»p" f g" xgj ¶ewru" { ' eco kppgu0³² Cu¶" gn' Guvcf q' hg' eqpegf k»" f lej qu' r gto kuqu' Apleco gpvg' c" f qu' hto cu" f g" ecr kcrqu" lcr qpugu. ' P kuucp³³ { " Vq{ qvc³⁴. " { " c" r ctvt" f g" cm¶" vpc" ugtkg" f g" dgpghlekqu" gp" o cvgtk" f g" ko r wguvqu" { " t guxtkeekppgu" c" rcu" ko r qtvekpogu0³⁵ Guvcu" hwtq" rcu" r tko gtcu" r qn" lecu" f gn'

r" ghlekgepek" geqp»o lec0" C" uw" xgl. " gmq" ug" eqo dlp»" eqp" gn' hqo gpvq" guvcn' c" e^a t vrgu. " gpvqpf kpf q" s wg" gptg" rcu" i tcpf gu" go r t gucu" f gd¶cp" eqpukwkt" oligopolios cordiales *cordial oligopolies+¶Lqj puqp. '3; : 4-0"
³²" Gp" 3; 56" gn' Ego k² " f g" Rtqo qek»p" c" r" Rtqf week»p" F qo² ulec. " wp" »ti cpq" f gn' O KVK" rcp| »" r" Eqplgtgpek" O kpkvgtkcn' r ctc" gn' Guvcngelo kpvq" f g" r" kpf wutk" Cwqo qvtk" gp" r" ewcn' r ctvekr ctqp"; " o kpkvgtkqu' pcekqpcngu" { " f g" f »pf g' uwi k»" r' r' g" { " f g" O cpwhcewte" kpf wutkcn' f g" Cwqo »xkrgu" s wg" ug" vgtto kp»" f levcpf q" gp" 3; 580"
³³" Gn' i twr q" P kuucp" gtc" r ctvg" f gn' ugi wpf q" i twr q" f g" zaibatsu. " r quvgtkt" cn' etgeko kpvq" f g" rcu" ewcvq" r t lpek' rgu" hco krcu' Uwu" pgi qekqu" kplekrgu" i kctqp" gp" vqtpq" c" r" eqo gtekn' cek»p" kpo qdkkctk. " f g" ugi wtqu" r" r" guvc" { " r" o kpgt¶c" ¶Lgpucpc. "4226-0"
³⁴" Cwps wg" gn' r gn' kq" f g" r' hco krc' hwpf cf qtc" gu" Vq{ qf c" *豊田+ug' f gek k»" o qf klect" gn' pqo dtg" f g" r" go r t guc" c" Vq{ qvc" { " c" s wg" uw' r tqpwekcekp" gu" o^a u' ugpckm" { " uw' guetkwte" uko dqrk' c" wp" eqo kpl| q' hgrk' <" Vq{ qvc" *トヨ+gp" Lcr »p" gu^a " eqpuk' gtcf q" o^a u' chqtwpfcf q" s wg" Vq{ qf c" *豊田+ { " c" s wg" ug" eqpuk' gtc" cn' qej q" eqo q" wp" pAo gtq" f g" r" uwgtvg" { " qej q" gu' gn' pAo gtq" f g" t' c| qu' pgeguctkqu' r ctc" guetkdt" Vq{ qvc" gp" Mcvnrpc0'
³⁵" C" uw" xgl. " ug" rgu' qdrki »" c" guvcu" go r t gucu" c" wkrk' ct" cwqr ctvgu' pcekqpcngu0"

i qdktgtpq'lcr qp²u'f kki kf cu'c'go r tgucu'kpf wutkrgu'gp'r ct vkwrt. 'rcu'ewcrgu'ug'hwpf co gpvdcip" eqo q'pgegukf cf gu'f g'f ghguc'pcekqpcn³³⁶*Lqj puqp."3; : 4-0"

"F g'gug'o qf q.'gp"3; 58"Vq{ qvc'eqo gp| »'rc'r tqf week»p'f g'uwu'eco kppgu'o qf grqu'I 3'c" wp'plxgnf g'372'wpkf cf gu'r qt'o gu.'rq's wg'hwg'gnr tko gt'r cuq'f g'rc'r tqf week»p'gp'o cuc0Nwgi q." rc'hkt'o c'r tgu'gp»'uw'r tko gt'xgj 'f'wru'f g'r cuclgtqu."gn'o qf grq'CC0'Gp"3; 59"Vq{ qvc'O qvt'ug" guvdrgek»'eqo q'wpc'eqo r c° 'f'kpf gr gpf kgpvg'f gn'tguvq'f g'rcu'go r tgucu'f gn'i twr q'{"gp"3; 5: " eqputw{ »'rc'r rcpv'f g'Mqtqo q.'cn'egpvt'uw'f g'Lcr »p0Guc'Anko c'gtc'wpc'r rcpv'f g'r tqf week»p" kpgi tcf c" s wg' kpenw'f' vqf qu' rqu' r tqeguqu' pgeguctku" r ctc" rc" r tqf week»p" f g' cwqo »xkrgu." kpenw'f qu' rqu' r tqeguqu' f g'hwpf lek»p" {"hqlc."o gecpk cf q."gpuc'o dmlg"o ge^a pleq."guvco r cf q." gpuc'o dmlg'f g'ecttqegt'f'cu."r kpwtc" {"gpuc'o dmlg'i gpgtcr³³⁷"Ecf c"wpq'f g'guvqu' r tqeguqu'ug" f kug° »'r ctc"s wg'guwxkgtcp"eqpgexcf qu." {"rc"r rcpv'f g'Mqtqo q'hqto »'rc"dcug'f g'rcu'hwwt'cu" h' dtlecu'gp'Lcr »p0"

3.2 – El sistema de producción y el método de Toyota

3.2.1 - El sistema de producción de Toyota (*Toyota Production System, TPS*)

F guf g'uwu'kplekqu.'rc'go r tguc'ko r ngo gp»'hqto cu'f g'vcdclq'gpo ctecf cu'gp'wp'ukuvgo c" kpgi tcn'f g'r tqf week»p'r tqr kq."ew{ q'qdlgkxq'gtc'tgf wek'equvqu'c"vtx²u'f g'rc' g'ko kpeck»p'f g' rcu'kpeqpukv'gpeku."gn'i cuvq" {"rc"uqdtgecti c'gp'mqu' r tqeguqu³³⁸"Guv'ukuvgo c'hwg'wp"j kq'gp"rc" j kvqtk'f gn'ecr kcrkuo q'f g'o qf q'vni's wg'cu'f'eqo q'mqu' r tkpek'ku'f gn'hqtf ku' q'lwi ctqp'wp'tqn' tgrgxcpv" gp" gn' f gucttqm" geqp»o leq" f g' GGWW" c" r tkpek'ku' f gn'uki m" ZZ." gn' VRU" hwg" f gvto kpcpv'gp'gn'f gucttqm'f g'r qui vgttc'f g'rc'geqpqo 'f'lc'r qpguc'xqp'Vwpl grm cpp."3; ; 9-0'

Guv'ukuvgo c'kpg'uwu'kplekqu'c'r ctvt'rc'r tqf week»p'vgz vkleq'gn'wuq'f gn'vgrt'o ge^a pleq." ewcpf q'Vq{ qvc'ko r ngo gp»'wpq'f g'mqu'eqo r qpgpvu'f g'uw'VRU."f gpqo kpcf q'jidoka, qt'kpvf q' c'rc'automatización con estilo humano'Eqp²uv'ug'cr wvdc'c"s wg'rcu'o^a s wpcu'r wgf cp'guvct" gp'hwpkqpc'o kpvq'ukp's wg'rcu'vcdclcf qt'gu'rcu'gu²p'eqpuv'p'go gpv'qdugtxcpf q.'qti cpk'cpf q' gn'ekewkq'f g' vcdclq'f g' hqto c' vni's wg' rc"o cs wpc'k'ug" f gvpi c' uqmq' ewcpf q' cni wpc"

³³⁶Eqo q'eqpugev'gpekf'f g'guvq' {"f gn'kplekq'f g'rc'KKI O.'Hqtf {"I O'uwur gpf kgtq'uw'r tqf week»p'gp'Lcr »p'gp"3; 5; 0'

³³⁷F gdf q'c'rc'dcl'f go cpf c'f g'r ctv' {"r kgl cu'r ctc'rc'r tqf week»p'f g'xgj 'f'wru'gp"3; 52'gz'k'p'r qecu'go r tgucu' r tqxggf qtcu'gp'Lcr »p.'gur gekm'gpv'f g'rcu'r ctv'f g'cegtq'0Rqt'gug'o q'v'xq.'gp"3; 56'Vq{ qvc'et»'wp'f gr ctv'co gpv' f g'r tqf week»p'f g'cegtq's wg'ug'gpecti cdc'f g'rc'r tqf week»p' {"t'ghk'pco kpv'f gn'cegtq'r ctc'rc'hdt'lecek»p'f g'r ctv' {"r kgl cu'f g'rcu'r tko gtqu'r tqv'kr qu'f g'cwqo »xkrgu's wg'ug'gucv'p'f gucttqm'cpf q'0F g'guv'bo qf q.'ug'eqo gp' ctqp'c" hdt'lect'in-house'r kgl cu'hwpf kf cu'eqo q'ecdgl cu'f g'ek'kpf tq.'dn's wgu'f g'ek'kpf tq'f' r kvqpgu.'bo kpv'cu'ug'ko r qt'vdcip" r ctv'f g'Ej gxtqrgv'eqo q'eki 'g'c'rcu.'b' tdrqu'f g'rg'x'cu.'x' r wrcu.'gpej wgu' {"eqo r qpgpvu'gr'v'lequ'0'

³³⁸Cu'f'iq'tgch'kto c'gr'etgcf qt'f gn'VRU."gn'kpi g'p'gtq'Ve'k'j K'Qj pq'3; : : <: +""en Toyota, como en todo el resto de las industrias, las ganancias sólo pueden ser obtenidas reduciendo costos". Ugi 'Ap'Uj ko k'w'3; ; ; +'gn'VRU' eqplki w'c'wp'eqplw'v'f g'bo² qf qu'r ctc'tgf wek'rcu'equv'qu'r qt'xgj 'f'wru'r tqf wek'q'0'

ktgi wrctkf cf " uwegf ꞑc." nq" ewcn' r gto kꞑc" c" wp" wcdclcf qt" qr gtct" eqp" xctkcu" o ^a s wꞑpcu" uko wn⁷ pgco gpvg*Qj pq."3; : : -0"

Nc"qtc'r ctvg'f gn'VRU'gu'gn'ukungo c'*justo a tiempo* "*just in time*+, gn'ewcnhwg'r tqr wguvq" r qt" Mkej ktq"Vq{ qf c"eqp"gn'eqo kgp| q" f g"rcu'qr gtcekppgu"gp"rc"r rcpvc"Mtqo q" c" hꞑcrgu'f g"rc" f²ecf c" f g"3; 520Gn'o kuo q" tghktg" c" s wg"gp"gn'r tqeguq" f g" r tqf weekp" u»nq"rcu' r ctvgu" { " r kgl cu" gur geꞑhleo gpvg'lpf kecf cu'ngi wgp" c"rc" rꞑpgc" f g"gpucio drcf q"gp"gn'o qo gpvq"gzcewq" f g" hqto c"cn' s wg'pq" j c{ c" r tqf weekp"gp"gzeguq."gu'f gekl."stock *Qj pq."3; : : -0F guf g"gn'r tkpek kq."gn' hꞑf gt" f g" Vq{ qvc" { c" r rcpvcdc"rcu"dcugu" f g" f lej q" ukungo c" f g" r tqf weekp" uquvplkpf q" s wg" "*lo más importante es asegurar que no haya escasez ni exceso, es decir, que no haya exceso de mano de obra ni tiempo para la producción designada. No hay desperdicio ni exceso. Significa no tener que esperar a que las piezas circulen (...)* Este es el primer principio para aumentar la eficiencia" *Vq{ qvc."4234-0Nc"ko r ngo gpvcekp" f g" f lej q" ukungo c" eqkpek kꞑ" eqp"rc" gptcf c" f g" Lcr »p" c"rc" KKI O" f gn'rcf q" f gn'Glg."gp"crkcp| c"eqp" Cngo cplc" g" Kcrkc0Gn'eqpvzq" f g" guecugl" f g" o cvgtkrgu" gp" gn'o cteq" f g"rc" i wgttc" r qvpekꞑ" gn'*just in time*" { c" s wg"ko r rke»" s wg" r ctc"rc" r tqf weekp" f g" xgj ꞑewqu" ug" cf s wktkgtcp" Àpleco gpvg" nqu" o cvgtkrgu" pgeguctkqu" u»nq" gp" gn' o qo gpvq" { "gp" rqu'xqnÀo gpgu" gur geꞑhleo gpvg'tgs wgtkf qu³⁹"

Nwgi q" f g"rc" i wgttc" { "gp"gn'o cteq" f g"rcu" c^o qu'f qtcf qu'f gn'ecr kcrkuo q" ug'j k q" pgeguctkq" ko r ngo gpvct"rc" r tqf weekp"gp"o cuc³: "Dclq" guvc" o qf crkf cf . "gn'eqpegr vq" f g" *just in time* ug'j k q" r qukdrng" c" r ctvk" f gn'ukungo c" f g" *kanban*,³³: gn'ewcn'gtc"wp" kꞑutwo gpvq" s wg'lpf kecdc" ew^a rgu" { "e»o q" rcu" r ctvgu" gtcp" wktk cf cu" gp" gn' o qo gpvq" { " r gto kꞑc" wp" eqpvtqn' o kꞑwekquq" f gn' r tqeguq" r tqf wekxq0E qp" gmq. 'rcu' r kgl cu'ug" gptgi cdcp" gptg'rcu' f kgt gpvqu' r rcpvcu' uqnr "gp" rqu'xqnÀo gpgu" pgeguctkqu" { "ug" r qf ꞑcp" grko kꞑct" rqu' kꞑxgpvctkqu' f gptq" f g" ecf c" r tqeguq0Cf go ^a u. "guvcu' v² eplecu" pq" hwgtq" uqnr "ko r ngo gpvcf cu" cn' kꞑvgtkqt" f g"rcu" r rcpvcu' f g" Vq{ qvc. "ukꞑ" s wg" wco dk² p" gtcp"

³³⁹"C"uw'xgl. "gp"gn'o cteq" f g"rc" i wgttc"gn'i qdkgtpq" lcr qp² u' r tqj kdk"rc" r tqf weekp" f g" xgj ꞑewqu' f g" r cuclgtqu' r ctc" cdcuwegt"rc" f go cpf c" r tkcf c0Gp" guvg' b cteq" ug' r tqf wgtq" b c{ qto gpvg'eco kppgu' s wg'gtcp" xgpf kf qu'c"rcu'hwgt| cu" o kktctgu'dclq"wp" gutkewq" eqpvtqn' f gn'i qdkgtpq" lcr qp² u0Cf go ^a u. "f wcpvg" guvcu' c^o qu'gn' O K/Klo r ngo gpv»wp" r rcp" r ctc" cwo gpvct"rc" ecrkf cf " f g"rcu'cwqr ctvgu' lcr qpgucu' eqo q' r ctvg' f g" uw'gutcvgi kc" r ctc" cwo gpvct"rc" ecrkf cf " f g"rcu" xgj ꞑewqu'0Cuf| "guvcdrgekꞑ" gn' T gi rno gpvq" f g" egt wkecekp" f g" r kgl cu' f g" cwqo »xkrgu" { " o cvgtkrgu' f g" cwqo »xkrgu" f g" cnc" ecrkf cf . " s wg" eqpukwꞑc" gp" gn' qvti co kgpvq" f g" egt wkecekppgu" f g" ecrkf cf " c" cs wgnrcu' hkt o cu' lcr qpgucu' f g" cwqr ctvgu' s wg' ewo r rgtcp" rqu' tgs wkuqu0C" r ctvk" f g"rc" qdvpekꞑ" f g" f lej qu' egt wkecf qu'rcu'cwqr ctvkcu' i q| cdcp" f g" wpc' ugtkg' f g" tcvco kgpvqu' gur gekrgu' { " dgpghlekqu' r qt' r ctvg' f gn'i qdkgtpq0C" tꞑ" f g" f lej q' r rcp. "gn'eqpvkpf q" hꞑecni f g"rcu' xgj ꞑewqu' f g" Vq{ qvc { qvc" etgekꞑ" eqpukf gtdrigo gpvg" *Laj puq. "3; : 4-0"

³³: "Nqu'dqo dctf gqu'c»o kꞑqu' c" { " P ci cucnk'pq" chgevtq" f kgevc o gpvg'rc" r rcpvc" f g" Vq{ qvc" gp" Mtqo q. " wkecf c" c" cr tꞑko cf co gpvg' 822" nō " f g" f kꞑcpek" f g" J kqij ko c0"

³³: "Gp"rc" r rcpvc" f g" Vq{ qvc" ^a tcvg' gn'rcpdc" gu'wpc' vctlgvc" s wg" eqpvkpg" kꞑhꞑto cekp" uqdtg' f cvqu' f gn'r tqxggf qt. "rc" r kgl c" s wg' ² ug' r tqxgg" { " gn' hꞑi ct" f qpf g' ug" gpewgvtc" f gptq" f g"rc" r rcpvc0Ukxg' r ctc" cdcuwegt" gp"gn'o qo gpvq" lwwq" rc" ecpwcf cf " pgeguctk" f g" r kgl cu' r ctc"rcu' wꞑkf cf gu' s wg' gu' p" gp" r tqf weekp. "c"rc" xgl " s wg" ukxg' r ctc" eqo wꞑlectng" cn' r tqxggf qt"rc" ecpwcf cf " f g" r kgl cu'c" gptgi ct" f kctko gpvg" *f rxtctgl " P gy o cp. "4239-0"

r tqr wguvcu'c'uwu'r tqxggf qtgu'o glqtcpf q'mqu'r tqeguqu'r tqf wevku'f g'vqf c'rc'ecf gpc'f g'xcmt " *Vq{ qvc.'4234-0"

C" uw" xgl ." gn' VRU" kpeqtr qt»" wpc" r rpkhecelep" uwcxk cf c" f g" rc" r tqf weekp" hpcn' *production smoothing-0'Gn'qdlgvkxq'f gn'uwcxk cf q'f g'rc" r tqf weekp."s wg"gu"wpc'f gekukp'f g" r rpkhecelep'f g'pkxgn'v e'vkeq'vco dk'p'eqpkef c'eqo q'Heijunka."gu'tgf wek'rc'xctkdkrk cf 'f g'rc" vcu'f g'r tqf weekp"gp'rc'gvr c'hpcn'f g'rcu'qr gtcekppgu'f g'hcdtkecelep"r ctc'etget"wp'hmlq'f g" f go cpf c'gucdng'r ctc'rcu'qvcu'qr gtcekppgu'f g'hcdtkecelep"gp'rcu'gvr cu'cpvgtkqtgu."cu'eqo q' tgf wek'gn'uvqen'f g'r tqf wevqu'vgo kpcf qu"*P 0'Y 0'Dki i ctv."3; ; 9=Eqrng cp"("Xci j ghk"3; ; 6= [cxw\ ("Cmærk"4229-0"

C"r ctvk'f g'rcu'etkuku'f gn'r gvt»ngq'gp'rc'f²ecf c'f g'3; 92."f gn'ci qvco kpvq'f gn'o qf gmq" hqtf kuc/ng{pgukcpq" {" f g" rcu" o^a u' tgf wek'cu' vcucu' f g" etgelo kpvq" geqp»o keq" o wpf krcgu" r quvgtkqtgu."gp'Vq{ qvc'ug'vgo kpctqp'f g'eqpxgpegt's wg'pq'gtc'r qukdng'ugi wk'eqp'gn'ukngo c'f g" r tqf weekp"gp"o cuc"*Qj pq."3; ; : 0'F g'guc'hqto c."ug'r tqhwpf k »"gn'VRU."gucdngelkpf q'wp" o² vqf q'f g'hcdtkecelep"s wg'hmpelkpcdc'gzenukxco gpvg'gp'dcug"c'rcu'f go cpf cu'f gn'o gtecf q"{" gko kpcdc'rc'uqdtgr tqf weekp'0'Guc'eqo r ngv'ko r ngo gpvcelep"gp'gn'o cteq'f g'iqu'eco dkqu's wg" ug' gucdcp" mgxcpf q" c" ecdq" gp" gn'ecr kcrkuo q" o wpf kcn'ng"r gto kks" c" rc" go r t guc" qdvgpgt" tguwncf qu'uwo co gpvg'hcxqtedngu."cwo gpwcpf q'rc'r tqf wevku'cf {" 'rcu'i cpcpeku0"

F g'gug'o qf q."Vq{ qvc'eqpepvt»"r ctvg'f g'rcu'i tcpf gu'vcpuhqto cekppgu's wg'ug'gucdcp" r tqf wekpf q'gp'gn'ecr kcrkuo q" o wpf kcn'gp'rc'f²ecf c'f g'3; 92."ukgp q'rc"xcpv wctf kc'f g'rcu" r t^a vkecu'f g'producción flexible"*lean production-"*Eqtkcv."4222=Eqxcttdkcu'X0("Tco ¶g| " R²tg| ." 4242=F qj ug' gv'cn0" 3; ; 7-0' Guv" pwxq" ukngo c" ko r rle»" gn'eco dkq'f g'rc" hqto c'f g" r tqf weekp"gp"o cuc'f g'dkppgu'kpf khtgpekcf qu'r qt'wpc'f g'etgelo kpvq"o^a u'ngvq"{" f khtgpekcf q0' Cu'eqo gp| »"wpc'gtc'f g'eqo r gvpekc'r qt'rc'ecrk cf ."rc'gtc'f g'iqu'r tqf wevqu'gur gekkecf qu"{" f g" rc'hcdtkecelep'r qt'iqu'0'F g'gmq'tguw»"rc'pgegukf cf 'f g'fpgcu'hgzkdngu'f g'r tqf weekp."hqi tcpf q' hcdtlect" ulp" wpc" o c{qt" tgqti cplk'celep" r tqf wevqu' f khtgpygu." c" r ctvk' f g" wpc" o kuo c" eqphki wtcelep'd^a ulec'f g'iqu'gs wkr qu"{" 'eqp'wpc'tgf wek'c'f go qtc'f g'clwvg"*Eqtkcv."4222-0"

F guf g'gn'r wpvq'f g'xkuc'gultewco gpvg'rcdqtcn'f g'Vq{ qvc."wpq'f g'iqu'o^a u'guwf kcf qu'gp" rc'rkgtewtc."ug"j c"ug^o cmf q"s wg" Vq{ qvc"pq"eqpekdk»" c"rcu'vcdclcf qtgu'eqo q" gpi tpcplgu" tggo r rc| cdngu'gp'wpc'i tcp"o^a s wpc'f g'r tqf weekp."ukpq's wg'ecf c'vcdclcf qt'hwg'hqto cf q'r ctc" wpc'xctkcf cf 'f g'vcdclqu"{" j cdkrk cf gu."pq'uqm'gp'rc'fpgc'f g'r tqf weekp."ukpq'vco dk'p'gp'gn' o cpvpkp kpvq.'tgcrk'celep'f g'tgi kntqu.'eqpvtqnf g'ecrk cf ."gve0'Gp'hw ct'f g'f gngi ct'rc'vctgc'f g" guwcpf ctk'ct'gn'vcdclq" c"wp'kpi gplgtq'kpf wutkcn'eqp'etqp»o gvtq."rc'i gtgpek'ecr cels»"c"rcu" r tqr kqu" vcdclcf qtgu' f gn' vcmgt" gp" guc" vctgc" {" ngu' f kq" rc" tgur qpucdkrk cf " f g" o glqtct"

eqpwpwo gpvg'gnf gugo r g° q.'r tqeguq'f luvpwxq'f gn'vq{qvuo q'f gpqo kpcf q'kaizen"*Dcwukpk"
4223+0'

Ukp"go dcti q."qtc'r ctvg'f g"rc'rkgtcwtc"j c"cuqxtcf q's wg."gp'tgcnk cf."gn'ukuvgo c"fg"
rtqf weekp'ug'j c'bo cpvpgkf q'bo gf kcpvg'vctgcu'gzegukxco gpvg'kpvpuksu'{'rti cu'j qtcu'f g'vcdclq"
swg'mgxc'c"uwu"go r ngcf qu'j cuvc"uwu'nf'bo kgu'f'f'lequ"*Hwo kq."4228<3: 4+0'C"uw'xgl."Dq{gt{"
Htg{uugpgv" *4224+" f guvecp" s wg" Vq{qvc" r wf q" guvdrgegt" cewgtf qu" eqp" uwu" go r ngcf qu"
i ctcpxk cpf q'guvdkrk cf {"ecttgcuf'g'rti q'r r' q'gp'rc"go r tguc.'r gtq'j cekppf q'r ctv'ekr gu'c'iqu"
vcdclcf qtgu'f g"rcu'tgf weekp'gu"eqpucp'v'f g"equvqu"vq'v'gu" s wg" f gd'f'c"j cegt" rc" go r tguc0'
Cf go a u.'ugi Àp'guvqu'cwqtgu.'rc'ht'o c'bo cpwxq'eqpucp'vgo gpvg'rc'ecp'kf cf 'f g'vcdclcf qtgu'r qt"
f gdclq'f g"rcu'p'k'gr'gu'p'gegu'ct'k'q' {"v'g'ek'ct'k' »"o wej cu'f g"rcu'p'gegu'kf cf gu'f g"rc"eqo r c°'f'c0"
Ugi Àp" f r'actgl "P gy o cp" *4239+." gn'r wpvq" egpvtcn' gp" rc" t'gr'ek'p' f g"rc" go r tguc" eqp" uwu"
vcdclcf qtgu'gu'rc'cegr wek'p'f g'rcu'Ànko qu'c'ko r r'ectug'eqp'rc'r q'f'f'ec'f g'tgf weekp'f g'equvqu"
{c's wg'cu'f'ug'eqp'ge'v'p'rcu'k'p'v'gt'gugu'f g"rc" go r tguc"eqp'rcu'f g'rcu'vcdclcf qtgu'Uki vk'p'f q'cn'
cwqt."ug"eqp'uk'w'f'g'cu'f'wp" òeqo r tqo kuq'vq{qv'k'v'cö" f q'p'f g'rcu'vcdclcf qtgu'c"v'cx² u'f g"rc"
tgr t'gug'p'ce'k'p'uk'p'f'ec'n't'guki p'cp'uw'x'q'w'p'v'f'f'g't'guk'rk'q'eqo d'c'v'k'c'rcu'r q'f'f'ec'f'g'tgf weekp'
f g'equvqu'c'eco dk'f g'rc'guvdkrk cf 'rcdqtcn0'

Rqt"Ànko q."gn'ukuvgo c"fg'r tqf weekp'f g"Vq{qvc"ug'f gur rgi »"gp"eqo dk'p'ce'k'p'eqp'wp"
f gu'ctt'qm'q'qt'ki k'p'cn'gp"gn'ukuvgo c"fg'r tqxggf qtgu'c"r ct'v'k'f g't'gr'ek'p'p'gu'eqo g'ek'rc'gu'f g'rcu'q"
r r'cl q." h'w'k'f'qu" ec'p'rc'gu' f g' k'p'ht'o c'ek'p." tgf weekp' eqpl'w'p'v' f g' equvqu' f g' v'cp'uce'ek'p' {"
r tqf weekp'{"v'cp'uh't'g'p'ek'f'g'v'ge'p'q'q'f'c'°*J g'r gt'{"J g'p'f'gtu'q'p."4236=Vq{qvc."4234+0'Gp'gu'v'g"
k'p'v'g'teco dkq."Vq{qvc"i ctcpxk cdc"c"uwu'r tqxggf qtgu'x'q'n'Ào g'p'gu'f g'eqo r tc'c'n'qu'r qt'rcu'q"
r g't'f'f'f'qu'f g'v'k'o r q'{"rc"r qu'k'k'k'f cf "f g'eqo r ct'v'k'rcu'd'g'p'g'h'ek'qu'f g"rc"t'gf weekp'f g'equvqu"
qv'q'ti cf cu'r qt'gn'VRU"*Dq{gt'{"Htg{uugpgv."4224+ Gp'd'cu'g'c'g'uc'ct'v'ek'w'ek'p'ug'cr w'p'v'cd'c"
i g'p'gt'ct't'gr'ek'p'p'gu'f g'u'ek'qu'g'p'v'g'gn'ec'p'v'g'{"gn'r tqxggf qt."f g'h'q'to c'v'cn's wg'co d'cu'r ct'v'gu'ug"
d'g'p'g'h'ek'p' gp"rcu'o qo g'p'v'qu'f g"² z'k'q' {"v'co d'k'p'co d'cu'ug'r g't'w'f'k's w'g'p' gp"rcu'uk'w'ek'p'p'gu"
k'p'x'g't'uc'u0"

Gn'q'd'lg'v'x'q'f g"Vq{qvc"gtc"o k'p'ko k'ct'gn'p'Ào g'tq'f g'r tqxggf qtgu'{"et'g'ct"cu'ek'ce'k'p'p'gu'c"
rcu'q'r r'cl q'cn'h'q'o g'p'v'ct" s wg'rcu'g'z'k'v'g'p'v'gu'ug"gz'r c'p'f'c'p' {"et'g'c'p'eqp'rc'h'k't'o c'gp'n'v'i ct'f g"
c'wo g'p'v'ct"uw'p'Ào g'tq'r c'tc"l'p'f'w'ek't'q'h'g't'cu'f g'r t'g'ek'qu'eqo r g'v'k'k'x'qu"*O eO k'nc'p."423; +0'F g'gu'v'g"
o q'f q."Vq{qvc"p'q't'ki g'uwu'g'g'ee'k'p'p'gu'f g'r tqxggf qtgu'r qt'rcu'o g'p'q't'gu'r t'g'ek'qu'q'h't'g'ek'f'qu."uk'p'q"
s wg'x'g'rc'et'g'ce'k'p'f g'x'c'q't'eqo q'wp'g'uh'w'g't' q'eqpl'w'p'v'f g'c'wo g'p'v'ct'rcu'ec'r c'ek'f cf gu'f g'gu'v'qu'c"

³⁴²C'uw'xgl." gu'w'f'k'qu'f g'ec'v'q'f'g'rc'ce'v'k'f cf 'f g"Vq{qvc"gp'r c'f'gu'gp'f'g'uctt'qm'q'eqo q'H'k'r k'p'cu"*J ct'w'ej k'4228+'g"
k'p'f'k'°*Uj g'nj ct'N'cn'F cu'{"U'q'd'k'p."4228+'t'g'x'g'm'p'rcu'bo c'rcu'eq'p'f'k'ek'p'p'gu'f g'rcu'vcdclcf qtgu'f g'rc" go r tguc0'

re'xgl 's wg'ug'tgf wegp'uwu'equuqu*J gr gt {"J gpf gt uqp."4236-0Guc'r qn'lec'f g'r tqxggf qtgu'f g' Vq{ qvc'r wgf g'xgtug'tghlclfc'c'gp'rcu'tgi rcu'r wdrkecf cu'gp'3; 5; "gp'rcu's wg'ug'uqukpgg's wg""una vez que se los designe como proveedores de Toyota, deben ser tratados como parte de Toyota (como plantas sucursales); Toyota realizará negocios con estos sin cambiar a otros, y hará todo lo posible para mejorar su desempeño" *VO E."3; ; : <98-0Guc'u'tgmkqpgu'c'rcu' q'r rc| q' tguwactqp" kpf kklf wcn' {" eqngevko gpvg" dpgghlekucuc" wcpvq" r ctc" gn' erkgpv" eqo q" r ctc" gn' cwqr ctvuc." {"hqt wgekgtp'c'Ap'o a u'gn'ukungo c'cwqo qwt' lcr qp2 u'*K gt'gv'cu'4233-043'Nwgi q." guc'hqto c'f g'xkpwcekp'ug'ko r ngo gpw'gp'rcu'hkrcgu'f g'rc'htc' c'gp'f kwpvqu'f c'f'gu'f gn'b wpf q' i gpgtcpf q'tguwacf qu'uko krcu'gu'*F {gt' {"P qdgqmc."4222-0Kqj "gv'cu'423: c=Ncpi hkrf Uo kj {" I tggpy qqf."3; ; : -0"

Ugi Ap'J glo *4235+."gp'guc'tgrecp'f g'eqqr gcekp'gpvtg'Vq{ qvc' {"uwu'r tqxggf qtgu.'rc' r tlo gtc'vco dl'p'ug'gpecti c'f g'bo cpvgpgt'wp'cnu'eqpvtqnl'udtg'hqu'ugi wpf qu'0E qp'gn'qdl'gkx'f g' o cpvgpgt'wpc'hwtg'f kxkuk'p'f gn'v'cdclq'gpvtg'uwu'cwqr ctvucuc."wp'gum'gej q'ugi wko kgpvq'f g'uwu' cevklf cf gu." {" j cekgpf q' ewo r rkt' uwu' r qn'lecu' f g' tgf week'p' f g' equuqu." Vq{ qvc' c'v'kdw'»" ukungo a v'eco gpvg'rc'r tqf week'p'f g'wp'o kuo q'r tqf wevq'c'v'gu'q'o a u'r tqxggf qtgu." i gpgtcpf q' ukwcekqpgu'f g'eqo r gvgpek'ho kcf c'gp'ewcpvq'cn'p'Ào gtq'f g'lwi cf qtgu'r gtq'ci w'cu'gp'v'to kpu' f g'uw'ecr cekf cf 'r ctc'o cpvgpgt'cnu'guv' pf ctgu'f g'ecrkf cf {" tgf week'p'f g'equuqu'*J glo ."4235." 4238-0Cuko kuo q."gn'cwqt' uqukpgg's wg."gp'qecukqpgu."qu'x'pewqu'gucdrgu' {"f g'rcu' q'r rc| q' eqp'wp'i twr q'egpvtcn'f g'r gs w'o qu' {"o gf kcpqu'cwqr ctvucuc'f g'Vq{ qvc'gu'eqpvtctt'gucf q'eqp' o c {qt'eqo r gvgpek' {"hgzklklf cf 'eqp'qvtqu'r tqxggf qtgu'r gth' tlequ'f g'rc'htc' c'*J glo ."4235-0'

Rctc'P qxken'gv'cu'0*4224+'qu'r tlpek' kqu'tgevtgu'f gn'hwpekqpc' kgpvq'f gn'VRU'v'kpgf gp'c' etgct'wp'pwgxc'v'kr q'f g'tgrecp' uqekcn'gpvtg'nu'go r ngcf qu' {"rc'go r tguc." {"gpvtg'2 uvc' {"uwu' cwqr ctvucuc'0Gp'gung'r wpvq.'b a u's wg'wpc'tgrecp' dcucf c'gp'r tlpek' kqu'geqp»o leq/r tqf wev'qu' ug' v'c'w' f g'rc' eqpvt week'p' f g' wp' x'pewu' uqekcn' f hgtgpvg' s wg'ko r nec'rc' gncdqtcek'p' f g' eqpugpuqu'udtg'wpc'ugt'g'f g'r tlpek' kqu's wg.'gp'rc' b gf kf c'gp's wg'ugcp'i gpw'pco gpvg'cr rkecf qu." i gpgtcp' wpc'pwgxc'eww'w'c' gp'o cvgtk' f g'tgrecqpgu'ncdqtcrqu." kpf wutkrqu' {"eqo gtekrqu'0 K'p'p'w'rc'eqpvt week'p' f g'eqpugpuqu'dcucf qu'gp'rc'k'p'v'gi tkf cf {"xgtcekf cf 'f gn'r tqegf gt'f g'rc' q'vc'r ctvg.'c'r guct'f g'rc'gz'k'ngpek'f g'k'p'v'tgugu'f kx'gti gpv'gu."eqo r ngo gpvt'kqu'q'tge'f' t'qequ'0Gp' guc'eqpvt week'p' f g'eqpugpuqu'ug' dcuc' gn'eqo r tqo kuq'eqp'rcu'go r tgucuc'r tqxggf qtgu." gn' eqo r tqo kuq'f g'r tqf wev'klf cf 'eqo q'r tlpek' kq'f g'f k'ut'kdwek'p'f g'k'petgo gpv'qu'f g'qu'ucn'ct'kqu' {"

³⁴³"Gp'Vq{ qvc.'gn'gi k'wp'r tqxggf qt'gu'wp'r tqeguq'rcu' q' {"r tqm'pi cf q's wg'ko r nec'xgt'k'lect'uk'gn'r tqxggf qt'ug' cf cr v'c'a'c'rc'tgf'f g'uw'ok'p'ut'q'0Gp'cni w'p'qu'ecuqu.'qu'r tqxggf qtgu'ug'ug'geek'qpc'r qts wg'v'k'p'p'p'p'q'x'cek'qpgu's wg' o glq'tcp'qu'r tqeguq'q'f kuo k'p'w'f gp'qu'equuqu'0Ug'gur gtc's wg'v'cpvq'qu'r tqxggf qtgu'pwg'x'qu'eqo q'qu'gz'k'ngp'v'gu' eqo r ctv'p'uwu' k'p'p'q'x'cek'qpgu'eqp' qvtqu'r tqxggf qtgu's wg'uw'ok'p'ut'cp'r tqf wev'qu'uko krcu'gu'0Rqt' n'q' v'cpvq."ugt' r tqxggf qt'v'cg'eqp'uki q'rc'qr qt'w'p'kf cf 'f g't'gek'kl'f'gcu'i gpgtcp'cu'c'v'cx'2 u'f g'rc'tgf'f g'uw'ok'p'ut'q'0'

f g'rcu'i cpcpeku."{ f g'tgf week»p'f gn'vcdclq'pgeguclq."{ f g'cpqo cñ'cu'f g'r tqf wevq' f g'r tqeguq0' Guv'f ct vewrct 'ukungo c'f g'r tqxggf qtgu'ug'cr rlect'a 'co dlē p'gp'c'ti gp'vpc' f'ug'a 'wpc'f g'rcu'ērcxgu' f gn'cnq'eqpvpgkf q'iqecñ'f g'uwu'xgj 'f'ewru.'eqo q'ug'xgt'a 'gp'iqu'r t»zko qu'ecr 'f'wru0'

Gp'tguwo gp.'gn'ukungo c'f g'r tqf week»p'f g'Vq{ qvc'ug'dcuc'gp'rc'd'Àus wgf c'f g'rc'tgf week»p' f g'equuqu'c'r ct vkt'f g'rc'r tqf week»p'clwuxfc'c'gp'xqn'Ào gpgu' f'vko r qu'f gvgto kpcf qu'r qt'rc' f go cpf c'f gn'o gtecf q.'g'xkcpf q'rc'uqdtgr tqf week»p0'Rqt'wp'rcf q.'guv'ko r rē»r tqeguqu'f g' vcdclq'uwō co gp'v'kp'vpguk'qu'r ctc'uwu'go r rēcf qu0'Rqt'q'vq.'gn'ukungo c'ug'eqo dlp»'eqp'wpc' ct vewrct'ek»p'eqp'uwu'r tqxggf qtgu'guvdrēgēgpf q't'grēkqpgu'f g'eqqr gtce'ek»p'c'rc'ti q'r rē| q'gp'rcu' ewrcgu'ug'eqo r ct vgp'iqu'dgpg'hekqu.'r gtq'co dlē p'rcu'r 2 tf kf cu."{ "ug'tgrēk' cp'hwgt'vū'eqpvt'qru' f g'ecrk'cf' f' f'gf week»p'f g'equuqu0'Guv'eqpl'wpv'f g'ko r rēo gp'vcek'qpgu'eqpuk'w' »'wp'o 2 vqf q' o cp'w'c'ewt'gtq't'gxq'wēk'q'pct'k'gp'rc'k'p'f wut'k'c'w'wqo q'v'k' s'w'ug'eqo r rēo gp'v' r gth'g'ewo gp'v' eqp'rc't'ggut'wewt'ce'ek»p'f gn'ecr kcr'kuo q'o w'p'f kcn'c'r ct vkt'f g'rcu'et'kuku'f gn'r g'v'»r'g'f'g'3; 92." r gto k'k'g'p'f q'c'rc'ht'o c'lcr'q'pguc'et'gegt'ce'grt'cf co gp'v'f w'cp'v'rc'ugi w'p'f c'o kcf'f'gn'uki m'ZZ0"

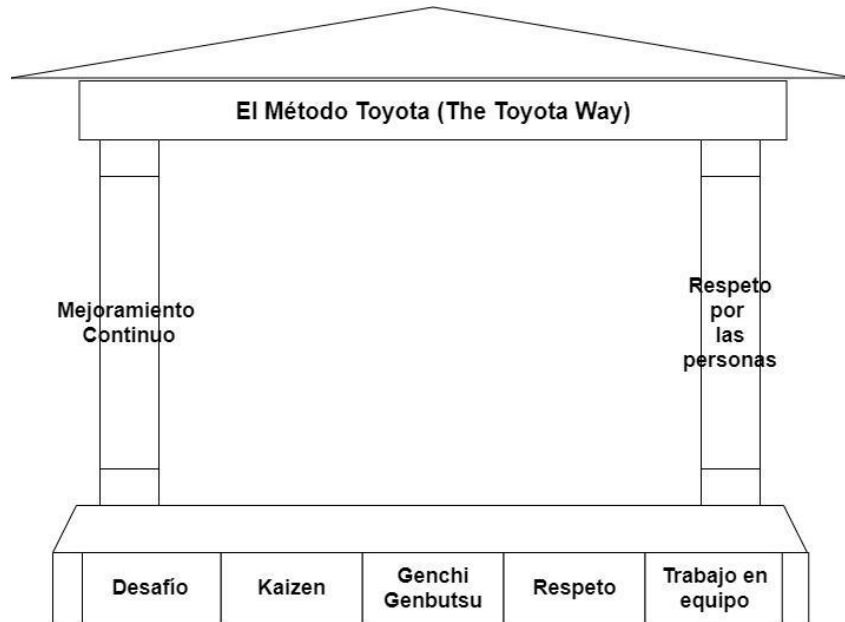
3.2.2 - El método de Toyota (*The Toyota Way*)

Ncu'ectcevg't'f'rc'ku'f gn'VRU'guv' p'hwgt'vgo gp'v't'grēk'q'p'cf cu'eqp'wpc'r ct vewrct'xkuk'p' go r t'guct'kn's w'g'c'r ct vkt'f gn'4224'rc'eqo r c'o 'f'f'gpqo k'p'»'el método Toyota'«*The Toyota Way*»⁴⁴⁴ Guc'uk'f gcu'hwgt'q'p't'guwo kf cu'gp'wp'f qewo gp'v'kp'v'g'p'q'f g'rc'eqo r c'o 'f'f'gp'4223's w'g'ug'hqto w'»' eqp'qdl'g'v'k'q'f g'o cp'v'g'p't'rc'gug'p'ek'f g'rc'eqo r c'o 'f'f'w'cp'v'g'uw'r tqeguq'f g'i'rd'c'rk' cel'ek»p'«⁴⁴⁵ g't' gv'c'f0'4233'«L0'N'ngt.'4225'«0'R'ctc'gmq.'ug'f'guct'q'm'»gn'r tqi tco c'*Toyota Way*'s w'g't'geqi 'f'f'iqu' r t'k'p'ek'k'qu't'g'ew't'gu'j' k'u'»t'k'equ'f g'Vq{ qvc' f' f'rcu'v'c'puo k'f'c'c'rcu'go r rēcf qu'f g'v'qf q'gn'o w'p'f q0' Guv'f qewo gp'v'g'zr rēc'dc'g'w'c'hw'qu'f'f'c'r ct vkt'f gn'f kci tco c'f g'w'p'c'ēcuc'c'r ct vkt'f g'f'qu'r k'ct'g'k' mejora continua' f' respeto por las personas *xgt' Hki wtc' «3-0'Gn'r tko gtq'f g'rcu'r k'ct'gu' f'g'uecpuc' uqdt'g'v'gu'dcugu'«c'«desafio.'s w'g't'gh'gt'g'c'n'r'gpuc'o k'g'p'v'c'rc'ti q'r rē| q=d'«kaizen.'s w'g'

³⁴⁴ Nqu' r tko gtqu' tgi k'kt'qu' guet'k'qu' f g' 2 uc' f c'v'p' f g' 3; 57' ew'c'p'f q' ug' guv'drēgēg't'q'p' rqu' E'k'p'eq' R't'k'p'ek' k'qu' H'w'p'f co gp'v'rcu'f'g'Vq{ qf c.'rcu'ēw'rcu'g't'ep'«c'«ulgo r t'g'ug't' h'gn'c'rcu'f'gd'gt'gu.'eqp'v'k'd'w' g'p'f c'cu'f'c'rc'eqo r c'o 'f'f'c'c'n' d'k'p' i' g'p'g't'c'n' d'«ulgo r t'g'ug't' guw'f'k'qu' f' et'g'c'v'k'x'q.'g'uh'q't' a' p'f'q'ug' r'qt' c'f'g'rc'p'v'ct'ug'c'rcu'v'ko r qu'«e'«ulgo r t'g'ug't' r' t' a' ew'eq' f' g'x'k'ct'rc' h'k'x'q'rk'f' c'f' f' ulgo r t'g'g'uh'q't' ct'ug'r'qt' et'g'c't'w'p'co d'k'p'v'g'h'co k'rk'c't'gp'gn'v'cdclq's w'g'ug'c'e' a' r'k'f' q' f' co k' c'd'rg'« f' g'«ulgo r t'g't'g'ur'g'v'ct'rcu'cu'w'p'v'qu'g'ur'k'k'w'rcu' f' t'g'eq't'f'ct'g'u'v'ct'ci' t'cf'g'ek'f'q'gp'v'q'f'q'o qo gp'v'«Vq{ qvc.' 4234'«0'Guv'rc'r t'k'p'ek'k'qu'hwgt'q'p'o q'f'k'k'c' p'f'q'ug'c'o' g'f'k'c's'w'g'ug'r' t'g'ug'p'v'cd'p'p'w'g'x'qu'f'g'u'c'l'f'qu'gp'rc'j' k'v'q't'k'f'g'rc' h'k'o c'r'gt'q'ulgo r t'g'o cp'v'g'p'k'p'f'q'rc'o' kuo c'gug'p'ek'0'F'k'ej'q'g'ur'f'k'w'hw'g't'guwo k'f'q'r'qt'N'ngt'«4225+gp'w'p'c'f'g'rcu' q'dt'cu'o' a' u'eq'p'w'nc'f'cu'v'q'dt'g'rc'gn'o 2 vqf q'f'g'Vq{ qvc' f' hw'g'z'r w'g'u'q'gp'uw'o q'f'g'q'r'k'co k'f'c'n'f'g'6'R't'qt'uwu'uki'rcu' gp'k'p'i' r' u'«hw'qu'f'f'c'«philosophy+ r t'q'eguq' «process+ r g'tu'q'p'cu' f' eqo r c'o g'tqu' «people and partner+ f' t'g'u'q'w'el'ek'p'f'g' r t'q'drigo cu'«problem solving+«xgt' hki wtc' 2/3'f'gn'c'p'g'z'q'G'w'c'f'f'k'w'eq'«0'Gp'rc'«dcug'f'gn'o q'f'g'q'ug'gp'ew'g'p'v'c'«c'«uw' hw'qu'f'f'c'f'g'rc'ti q'r rē| q.'s w'g'ug'eq'p'eg'p'v'c'gp'g'z'eg'f'g't'rcu'p'g'eg'uk'f'c'f'gu' f' g'z'r'g'ew'v'k'cu'f'g'rcu'eqo r t'cf'q't'g'u'«d' r t'q'eguqu.'s w'g'eq'p'uk'ng'gp'rc'i' t'c't'eq'p'w'c'p'v'go gp'v'r' t'q'eguqu'o' a' u'g'h'ek'ep'v'g'u'«e'«r' g'tu'q'p'cu' f' eqo r c'o g'tqu.'s w'g'g'u'v'cd'rg'eg' rc'ko r q't'v'p'ek'f'gn'v'cdclq'gp'gs'w'r'q'f'gp'v'q'f'g'rc'eqo r c'o 'f'f'« f'«u'q'w'el'ek'p'f'g'r' t'q'drigo cu.'s w'g'cr'w'p'c'c's w'g'rcu' go r rēcf qu'guv'p'eq'p'w'c'p'v'go gp'v'kp'v'g'p'f'q' t'g'u'q'k'g't'rcu'r' t'q'drigo cu'f'g'rc'go r t'g'uc'0'

tgo kg'c'rc'o glqtc"eqp'kpw³⁴⁵"{ "e+genchi genbutsu."s wg"uki p'k'c'rc'nc'hwpg'r ctc"gpqvtct " nqu"j gejj qu0[" gn'ugi wpf q"fg"nqu"r kctgu."fg"respeto por las personas."ug"r quc"uqdtg"fg qu" eqpegr vqu<f "+respeto="{ "g+"trabajo en equipo0"

Figura III-1 - Diagrama sobre el método Toyota (The Toyota Way)



Hwpgv<gndqtcels>p'r tqr k'gp'dcug'c'Nkngt{"J qugwu."422: +0

Gug'f qewo gpvq'ug'f kwtkdw{ >'c'vqf cu'rcu'k'rc'ngu'f g'rc'go r tgu'c'gp'gnib wpf q'r ctc'k'p'v'p'v'ct " tgr r'lect'g'wcu'kf gcu'f g'Vq{ qvc'Lcr >>"gp'nqu'f k'w'p'v'qu'r c'p'gu'f qpf g'f gugo d'ctecdc'rc'htc o c'f g' F lgi q'g'v'c'ri0"422; =Uqupqxumknj ."4238+0³⁴⁶"Ugi Àp'Hwo kq'4228<3: 3+. "Vq{ qvc'pq'gu'gn'v'k' q'f g' GO 's wg'o q'x'k'k' c'uw'uk'k' f g'r tqf week>p'f g'wp'w'i ct'c'q'v'q'r ctc'cugi wtct'gn'ceegu'c'o cpq'f g' qdte" d'ct'c'c."gp"eco dkq."gu'gn'v'k' q'f g'eqtr qtcel>p"s wg'qd'v'k'p'g"i c'p'c'p'ekcu'cn'k'p'f v'ek" c"uwu" v'edclcf qtgu'c'v'edclct'f g'o c'p'g'c'g'h'k'k'p'v'g'cn'g'w'c'd'ng'eg'g'uw'uk'w'go c'gp'nqu'uk'k'qu'f g'r tqf week>p' g'w'c'd'ng'ekf qu0³⁴⁷"

³⁴⁵Gp'r ct'v'ew'ct. "rc'r' t' a' e'v'ec'f g'kaizen j c'uk'f q'o w'f 'ko r qt'v'p'v'g'gp'gn'z'k'q'f g'hu'r tqegu'qu'r tqf v'ek'x'qu'f g'Vq{ qvc' *V'eng'we'j k"422; +0'Uw'ko r r'go gp'v'cel>p'ko r r'k'ecdc's wg'v'q'f qu'qu'go r r'g'cf qu'f g'rc'htc o c.'f g'uf g'gn'o a' u'd'clq'gp'rc' g'ue'rc' "lgt' a' ts' w'ec."j cu'c'gn'o a' u'c'ng'p'k'x'gn'r qf 'p'p'w'i g't'k'r'gs w'g'o qu'eco dk'qu's wg'o gl'qt'gp'gn'r tqegu'qu'r tqf v'ek'x'q'0' Gu'q'w'o d'k'p'ug'ng'x'c'c'ecdq'gp'rcu'k'rc'ngu'ct'gf'gf'qt'f'gn'o w'p'f q'0'Gp'rc'k'rc'cn'cti'gp'v'p'c'ug'j'cp'ko r r'go gp'v'cf q' f'k'w'p'v'qu'r'gs w'g'o qu'eco dk'qu'd'clq'gn'o 2'v'q'f q'kaizen"s wg'hw'g't'q'p'ug'o c'rc'f qu'r qt'rcu'gl'g'ew'k'x'qu'eqo q'h'c'v'q't'gu's wg'o gl'qt'ct'q'p'q'v'cd'rgo gp'v'g'gn'uk'w'go c'f g'r tqf week>p'0"

³⁴⁶E'w'c'p'f q'rc'eqo r c'o 'p'g'w'c'd'ng'eg'w'p'c'uw'd'uk'f'k'ct'k'c'gp'wp'p'w'g'x'q'r c'p'u't'g'c'rk' c'w'p'c'k'p'x'g'unk' c'el>p'uqdtg'p'ge'g'ul'cf'gu' p'c'ek'p'c'rgu'f' "hu't'gs'w'k'k'qu'co d'k'ep'v'rgu'f'g'2'ug'f' "ug'd'w'ec'rc'u'o gl'qt'gu'hqto cu'f'g'ko r r'go gp'v'ct'rc'ew'w'w'c'Vq{ qvc'gp' rc't'g'c'rk'cf' "p'c'ek'p'c'n'f'g'v'g'to'k'p'cf'c'Nkngt{"J qugwu."422: +0'R'ctc'nc'i' t'ct'ng'."Vq{ qvc'gp'x'p'k'p'ut'w'v'q't'gu'l'cr'q'p'g'ugu' n'co'cf'qu'kaizen'c'rcu'go r t'g'uc'u'w'd'uk'f'k'ct'k'c'u'r'ctc'gp'ug'ct'c'rc'u'i'g't'p'v'g'u'h'q'ec'rgu'f' "hu'go r r'g'cf'qu'rc'ew'w'w'c'Vq{ qvc." v'c'p'uh'g't'k'v'g'ep'q'ni' 'p'u'j'cd'k'rk'cf'gu'g'k'p'v'g't'eco d'kt'g'z'r'g't'k'p'ek'u'G'ng{"f' "H'w'ly'ctc."4222+0'

³⁴⁷F'g'g'ug'o q'f q."c'p'v'g'nqu'f'g'uc'h'qu'f'g'rc'k'p'v'g't'p'c'ek'p'c'rk' c'el>p."nqu'r't'k'p'ek'k'qu't'g'ev'q't'gu'f'g'rc'go r t'g'uc'hw'g't'q'p' o q'f'k'k'ec'f'qu'r'rc'p'v'g'p'f'q'ug'<c'+l'gt'w'p'c'eqo r c'o 'p'c'f'gn'o w'p'f q=d+l'gt'x'k'c'w'p'b'c'q't'd'k'p'g'uct'f'g'rcu'r'g't'u'p'cu'gp'v'q'f'cu'

" Nc'i guk»p"gutcv²i kec'f g'rc'r tqf week»p"guv^a f ghkpk c'r qt "gn'f gkpgco kgpvq'f g'qdlgvk»qu" f g'r tqf wek»k cf " { "ecrk cf "f g'rc'ti q."o gf kcpq" { "eqtvq'r rc| q"eqp"rc'r qudkrk cf "f g'guvcdregegt" tguwncf qu'o gf kdrgu"gp"vqf cu'rcu'gver cu'f g'i guk»p"»f rctgl 'P gy o cp.'4239+0Rctc'rc'f ghkpk»p" f g' guvqu"qdlgvk»qu"ug" wkrk c" wpc" j gttco kgpvc" f g"i guk»p" rco cf c" *Hoshin*" cpwcn" f qpf g"ug" r quwrcp"rcu'cevkk cf gu"eqpetgcu" c" f gucttqmt" f wcpvg" gn'c° q. "eqpxk v² pf qug"2 uvcu" gp" gn' *Hoshin*" f g'rc'eqo r c° ¶c⁰48"C"uw'xgl . "gn'*Hoshin Kanri*"uwvpgv'rc'xkuk»p" f g'rc'eqo r c° ¶c. " { "j ceg" tghgtgpek" c" wv"qdlgvk»q" kf gcn'f g'r tqf wek" cwqu"cn'o^a u'dclq"equvq. "gp"gn'o qo gpvq"lwuvq" { "eqp" rc"o glqt"ecrk cf O'Uqdtg" guv" xkuk»p" ug" guvcdregep" rqu"qdlgvk»qu" eqpetgvquO' Gn' *Kanri*" gu" gn' guvcdregeko kgpvq'f g'ekemqu'r ctc'crecp| ct"rqu"qdlgvk»qu" f gugcf quO'K r rlec"rqu"uki vkepvu'r cuqu<c+" rc"grcdtcek»p" f g"gutcvgi kcu" { "r rcpgu" f g"ceek»p"=d+"rc"ko r ngo gpvcek»p" f g"rqu"r rcpgu"=e+"rc" gxcn»cek»p" f g'tguwncf qu"= { "f +rc"vqo c" f g'o gf kf cu'cr tqr kcf cuO'

C"r ctvk" f g"rqu"*Hoshin*"ug"guvcdregep"rqu"qdlgvk»qu"cpwrcgu" f g'rc'eqo r c° ¶c"s wg"ugt^a p" o qvqtk cf qu'r qt"rc"grcdtcek»p" f g"gutcvgi kcu" { "r rcpgu"eqpetgvqu" f g"ceek»pO'Guvqu."c"uw'xgl . " ugt^a p" ko r ngo gpvcf qu" gp" gn' r tqeguq" f g" r tqf week»p" cttqlc pf q" tguwncf qu" s wg" r qf t^a p" ugt" eqpvcucf qu" { " gxcn»cf qu" f g"cewgtf q" eqp" rqu" qdlgvk»qu" r tgxkco gpvg" r rcpkhecf quO' Uk" rqu" tguwncf qu" gur gtcf qu"pq"ug"crecp| ctqp. "ug"vqo cp"rcu"o gf kf cu"pgeguctkcu"r ctc"pq"xqrxgt" c"uw" tgewtgppekO'Uk"ug"crecp| cp"rqu"tguwncf qu" gur gtcf qu. "ug"r tqegf g" c"rc"guvcpf ct k ccek»p" f g" guvquO' Cn'eqo dlpctug" gn' *Hoshin Kanri*" eqp" gn' *Kaizen*" *o glqtc" eqpvkpw+." rc" guvcpf ct k ccek»p" pq" eqpukwv { "wpc'tki kf gl . "ukpq's wg"lwr qpg'wpc"eqpucpv'ko r ngo gpvcek»p" f g'tghqto cuO'Grl'emq' f g" guvcpf ct k ccek»p" gu"vcr'j cuv"s wg"gu"kvqf wek'c" wpc"pwgxc"o glqtc" { "ug"xwrgx" c" guvcpf ct k ctO' Guc" hqto c" f g" f ghkpk" rqu" qdlgvk»qu" gutcv²i lequ"ug" gpewgpvc" tgi wrcf c" vcpvq" r qt"rc"o cvtk" gr kv²o kec'f g'rc"o glqtc"eqpvkpw"gp"gn'pkxgn'f g'rc"õhkrquqf¶cö."eqo q" r qt"gn'*just in time*"gp"gn' pkxgn'f g'rc'r tqf week»p"»f rctgl 'P gy o cp.'4239+0'

F g" guv" hqto c." f gn'o kuo q" o qf q" s wg" Vq { qvc" f gucttqm»" wv" kppqxc f qt" ukvgo c" f g" r tqf week»p. "co dl² p" guvcdregeko" f guf g'uw'lpkekqu" wpc" gutcvgi k" eqtr qtcvkc" r ctvewrt. "rc"ewcn' guwvq"dcucf c"gp"gn'r gpucv kgpvq'c'rc'ti q'r rc| q" { "rc"o glqtc"eqpvkpwO'C"o gf kf c's wg"ug" f gucttqm»" rc"j kvqtk" f g"rc'eqo r c° ¶c" guvqu" r tkpek kqu"hwgtqp"eco dlcpf q" { "cf cr v² pf qug" c" rqu" f gucl'qu" eq { vpwrcrguO'Gur ge¶heco gpvg. "c'r ctvk" f g'rc'kvqtpcekqpcrk ccek»p" f g'rc'hko c. "Vq { qvc" gph gpv»" rcu" f khevncf gu" f g'tgr rlect. "pq"u»rqu"uw'ukvgo c" f g'r tqf week»p. "ukpq"uw'ewwrtc"go r tguctkcn'gp"

r ctvuc"vtx²u'f g'rc'wkw cf q'f g'rc'ugi wtk cf " { "f gn'o gf kqco dlkpvge=e+ugt" rff gtgu"gp"vgepqm¶c { "gp"ucvukceek»p"cn' erkpvg=f +ugt"wp"o kgo dtq"eqpvtkdw' gpvg" c"rc'eqo wpl cf "gp"ecf c"pcek»p=g+"hqlct" wpc"ewwrtc" eqtr qtcvkc" s wg" j qptg"rc"lpf kxk wcrk cf "c"rc"xgl "s wg"r tqo wgx"gn'vcdclq"gp"gs vkr q=h"ngxct" c"ecdq"wp"eqpvkpw"etgelo kgpvq" c" r ctvk" f g'wpc'cf o kpkwcek»p"ghkkgpv" { "i rcdn"= { "i +etgct" tgrcekqpgu' f wcf gtcu"eqp"uqekqu"go r tguctkrgu" c" h'rc'ti q" f gn'o vpf qO'

³⁴⁸C"r ctvk" f g'gug"r rcp'egpvcn'ug'eqphk wtc'wp" f gr ctvco gpvq' f g"*Hoshin*" q'Wpk cf "*Hoshin* s wg'xc" c" guvcdregegt" hqu" r rcpgu. "qdlgvk»qu" { "cevkk cf gu'r ctc' rqu" f go^a u'ugevt gu'c' hkp' f g'qdvpgt' hqu" tguwncf qu" f gugcf quO'

r c¶u"uwo co gpv" f kxkpvu" c" Lcr »p' C o dqu" grgo gpvqu" cs w¶ f guetkr vqu. "vcpvq" uw" ukurgo c" f g" r tqf weel»p. "eqo q" uw' xkuk»p" go r tguetkcn" uqp" cur gevqu" encxg" f g" r c" guetcvgi kc" go r tguetkcn" f g" Vq { qv" vcpvq" gp" uwu" kpekqu" gp" Lcr »p" eqo q" gp" uw' g' zr g' t' k' p' e' k' o' w' n' k' p' c' e' k' q' p' c' n' ' r' q' t' m' ' v' c' p' v' q' . " u' q' p' w' p' " h' e' v' q' t' " f' g' v' g' t' o' k' p' c' p' v' g' " r' c' t' c' " g' p' v' g' p' f' g' t' " r' c' " v' t' c' { g' e' v' q' t' k' c' " g' z' e' g' r' e' k' q' p' c' n' ' f' g' " r' c' " h' k' t' o' c' " l' c' r' q' p' g' u' c' " g' p' C' t' i' g' p' v' k' p' c' 0' "

3.3 - Crecimiento en Japón y aumento de las exportaciones (1945-1973)

C" r guet" f g" r c" f gttqv" f g" Lcr »p" gp" r c" KKI O . " gn" pwxq" eqpvz vq" kpvgtpeckqpcn" hmg" hcxqtcdrg" r ctc" gn" r c¶u" gp" f kxgtuqu" cur gevqu" Rqt" wp" rcf q. " gn" kpekq" f g" r c" I wgttc" H¶c" eqpf wq" c" s wg" Guvcf qu" Wpkf qu" wkrk ctc" gn" r qvpeknkpf wutkcnf g" Lcr »p" eqp" gn" hkp" f g" hqt vregt" uw" r qulek»p" o kxkt" h gpv" c" r c" Wpk»p" Uqxk² vkc" gp" wpc" t gi k»p" gp" f kur wc" *Eqmcpvqu. "422: +. " Cf go a u. " r c" r qvpekc" pqt vgo gtekcpc" cdtk»" uwu" o gtecf qu" c" r c" u" g' z' r' q' t' v' e' k' q' p' g' u' k' p' f' w' u' t' k' e' m' u' " f' g' " L' c' r' »' p' . " h' c' x' q' t' g' e' k' p' f' q' " c' " w' p' c' " u' g' t' k' g' " f' g' " g' o' r' t' g' u' c' u' " g' p' v' t' g' " r' c' u' s' w' g' " u' g' " g' p' e' q' p' v' t' c' d' c' " V' q' { q' v' c' 0⁴⁹ " C' " u' w' " x' g' l' . " c' " r' g' u' c' t' " f' g' n' l' p' i' t' g' u' q' " f' g' " L' c' r' »' p' " c' n' " H' O' K' { " c' n' " C' e' w' g' t' f' q' " I' g' p' g' t' c' n' " u' q' d' t' g' " C' t' c' p' e' g' r' u' " C' f' w' e' p' g' t' q' u' { " E' q' o' g' t' e' k' q' " *I C V V +. ³⁴: " r' c' u' r' t' l' p' e' k' r' c' r' u' r' q' v' p' e' k' u' f' g' n' i' o' w' p' f' q' " e' c' r' k' e' r' k' u' c' " h' g' " r' g' t' o' k' k' g' t' q' p' " c' n' l' r' c' ¶u' t' g' u' t' k' p' i' k' t' " r' c' u' k' o' r' q' t' v' e' k' q' p' g' u' { " e' q' p' v' t' q' r' c' t' " g' n' l' v' r' q' " f' g' " e' c' o' d' k' q' " f' g' n' i' { g' p' " e' q' p' " t' g' u' r' g' e' v' q' " c' n' t' g' u' v' q' " f' g' " r' c' u' f' k' x' k' u' c' " * V' q' { q' v' c' . " 4234-0' "

Cf go a u. " Lcr »p" eqphqto »" gn" Egpvtq" f g" Rtqf wevkkf cf " Lcr qp² u" *LRE. " r qt" uwu" uki r c" u" gp" kpi r f u" gp" gn" c° q" 3; 77" eqo q" wpc" gpvkf cf " vkr ctvkc" f g" r c" s wg" r ctvkr cdep" r c" u" go r t g u c u . " g n' i q d k g t p q " { " n u " u k p f k e c v u " e q p " g n' q d l g v x q " f g " c w o g p v c t " h w g t v g o g p v g " r " r t q f w e v k k f c f " r c t c " t g e q p u v t w k t " r " p c e k » p 0 N q u " e q p u g p u q u " s w g " u g " g u v c d r g e k g t q p " g p " g n' l u g p q " f g n' l R E " f l g t q p " h w i c t " c " v p c " u g t k g " f g " e q p e g u k q p g u " c " n u " u k p f k e c v u " e q o q " r c " u g i w k f c f " { " r c " g u v c d k k f c f " g p " g n' g o r r g q " f g " n u " v t c d c l c f q t g u 0 " C " e c o d k q . " n u " u k p f k e c v u " u g " e q o r t q o g v ¶ c p " c " e q m d q t c t " e q p " g n' r t q e g u q " f g " t c e k q p c n k c e k » p " s w g " u g " r q p ¶ c " g p " o c t e j c . " r g t q " e q p " r " r c t v e w r t k f c f " s w g " g u v c " e q m d q t c e k » p " f g d ¶ c " t g c r k c t u g " o a u " c m f " f g " n q " u c r t k c n 0 G u v q " f k q " r c u " e q p f k e k q p g u " r c t c " r c " e r n e c e k » p " f g n' V R U " * f n c t g l " P g y o c p . " 4239-0 R c t v e w r c t o g p v g " g p " V q { q v c . " E q t k v " * 4228 < 4 : / 4 ; + r n c p v g c " r " g z k u v g p e k " f g " v t g u " c e q p v g e k o k g p v u " g p v t g 3 ; 6 ; " { 3 ; 72 " s w g " f l g t q p " h w i c t " c " v p c " h w g t v g " t c e k q p c n k c e k » p " { " s w g " w d l e c t q p " c n' V R U " f g p v t q " f g " n q " r g p u c d r g < w p c " e t k u k u " h k p c p e k g t c " s w g " e c u k " n g x c " c " r c " s w g d t c " c " r c " g o r t g u c = w p c " j w g n i c " g p " t g u r w g u v c " c " r c " t g g u v t w e w t c e k » p " k o r w g u v c " r q t " r c " e t k u k u " s w g " v g t o k p » " e q p " g n' f g u r k f q " f g " 3 0 2 2 " q d t g t q u = " { " g n' g u v c n k f q " f g " r c " i w g t t c " e q p " E q t g c " s w g " f g u v c » " w p c " q r g c f c " f g " f g u r k f q u 0 " c u k x q u " "

³⁴⁹"C" uw" xgl . " Vq { qv" hmg" cegr vfc" c" r ctvkr ct" gp" gn" r tqi tco c" f g" gpvtgpc kpvq" kpf wutkcnf gn" F gr ctvco gpvq" f g" I wgttc" f g" Guvcf qu" Wpkf qu" s wg" ug" gphqecf c" gp" gn" r tqeguq" f g" f guetqmq" f g" r tqeguqu" { " go r r g c f qu" *O ci gg. "4229-0' "
³⁴: "Qti cpk cek»p" s wg" hngi q" ug" vcpuhqto »" gp" r c" QO E0' "

gp"wp"o qo gpvq"gp"s wg"r"go r tgu"cecdcdc"f g" gpectct"r"tggutwewtcel»p" { "s wg"qdrki »"c" cwo gpvct"r"r tqf wexkcf cf "ukp'tgewtkt"cnlcwo gpvq"f g'r gtuqpcr³⁴:"

Gp"guvg"pwxq"eqpvzq"gn'r c"ju"cul³⁵²»veq"eqo gp| »"wp"r tqeguq"f g"cegrgtcf q"etgeko kgpvq" geqp»o leq"q"kp f wutkcr/Nc"kp f wutk"cwqo qvtk "lcr qpguc."eqp"Vq{ qvc"lpenmkf c."etgeko"gp"i tcp" o gf kfc"r ctvk"fg"r"r f²ecf c"fg"3; 72."ceqo r c° cpf q"gnlcwo gpvq"f g"r"r f g"pukf cf "fg"r xgj "fawru" r gt" e^a r kc" gp" gn'r c"ju³⁵²»*xgt" I t^a hleq" KKK3+0" Nwgi q" f g" wp" r tqeguq" f g" etgeko kgpvq" kpvtpq" cegrgtcf q."gp"3; 82"gn'O K/Kf kur wuq"r"cr gt wtc"i tcf wcr"fg"r"u"ko r qt vcekpgu"fg"r tqf wvqu" cwqo qvt gu'cnb gtecf q"lcr qp²u"eqp"gn'qdlgwxq"fg"dclct"mru"r tgekqu"fg"mru"xgj "fawru"lcr qpgugu" { "s wg"uwu"go r tgu"i cpvg"eqo r gkxkcf cf "kpvtpcekqpcr³⁵³"H"gpvg"c"guvg"eqpvzq"fg"lpo kpgpv" cr gt wtc"eqo gtekn"mru"qdlgwxqu"fg"Vq{ qvc"ug"egpvtctqp"gp" f kxgtukhlect"uwu"o qf grmru"r ctc" eqo r ngvct"gn'line up { "co r rkt"uwu"ecr cekf cf gu"r tqf wexkcu"r ctc"mri tct"r"r tqf week»p"fg"r qu" o kmppgu"fg"r xgj "fawru"r qt" c° q. "s wg"gu"m" s wg"mru"mff gtgu."Hqtf . "I gpgtcn'O qvtu" { "Xqmuy ci gp." guwcdp"r tqf wexkpf q" c" hpcrgu"fg"3; 820⁵⁴""

Cu"l" f wcpvg"guqu" c° qu"ug"r"cp| »"gn"Vq{ qvc"Eq tqm. "wp"xgj "fawru"fg"r cuclgtqu" s wg"gp"3; 96" mri t»"ugt"gn'o^a u"xgpf kf q"gp"gn'o wpf q" { "gp"gn'4242"ug"r qulekq»"eqo q"gn'o qf grm"o^a u"xgpf kf q" gp"r"j kuvtkc" *35 12: 14243."Vq{ qvc"Vko gu"»*xgt"Vcdm"2/6" f gn' Cpvgzq"Guvcf "lveq+0" Cuko kuo q." gp"r"ugi wpf c° b kcf "fg"3; 82"ug"tgnrk ctqp"cewgtf qu"eqp"fg"qu"hdtecpvqu"fg"xgj "fawru"lcr qpgugu"

³⁴: "F wcpvg"mru"r tko gtqu" c° qu" f g"r" f²ecf c"fg"3; 72"Vq{ qvc"mgx"»cf grpv"guvcgi kcu"fg" f gucewxcel»p" ukp f kcr/O Ugi Ap"Uj ko k w" *3; ; + "gpvg" gucu" guvcgi kcu" ecdg"o gpekqct<r"ru"r tqr wguu"fg" r tqo qek»p" r qt" r ctvg"fg"r" f kgeek»p" c" mru"o kxcpvru"r ctc"ugr ctctmru" f gn'ukp f kcvq. "gp" f qpf g"cpw" vqu" f kki gpvru" f gxpktq"gp" uw" gtxkqtgu"q" ewcf tu'b gf kqu"r" f kxk»p" f g"mru"ghgewxqu"gp" f kxkpvqu"dewtr qu'o. "r qt" glgo r m. "gn' f g"mru" f k mru"o cf qu"gp"r" guewgr" f g"Vq{ qvc"r" f guclhkec»p" f gn'ukp f kcvq"fg"mru"dewgrmru"dnpequ"o" r tqo qekpccf qu" { "r qt" Anko q. "mru"ghgequ"fg"r" f gttqvc"fg"mru" c° qu"3; 72" { "3; 75"eqpf wq" c" s wg"r"o c { qt" r ctvg"fg"mru"o kxcpvru"ug"hwgtcp" f gn'ukp f kcrkuo q" r ctc" tgr mri ctug"gp"gn'vcdclq" { "r tggewr ctug"fg"uw'xkcf c"r gtuqpcr" { "ho kxct"o"

³⁵²"C" r ctvk"fg"r"i tcp" gzr cpuk»p"fg"r"r tqf week»p"fg"Vq{ qvc"gp"r" f²ecf c"fg"3; 72"eqo gp| ctqp" c" cr ctgegt" r tqdrgo cu"v²epkequ"gur ge"lvequ"gp"mru"xgj "fawru"Ugi Ap"gn'xlegr tgukf gpvg"glgewkxq" { "uqdtkq"fg"Ucnkej k"Vq{ qf c." Gkk"Vq{ qf c." s wgp"cuwo k"p"r" r tgukf gpek"fg"VO E"gp"3; 89."gnlcwo gpvq"fg"r"ecrk cf "pq"guwcd"ceqo r c° cpf q"gn' etgeko kgpvq"gp"r" r tqf wexkcf cf O'Eqo q"eqpugewpeke"fg"grm."gp"3; 85"Vq{ qvc"r"cp| »"r"Rqf"llec"Eqtr qtcvxc"fg" Vq{ qvc" s wg"eqpuk"p"gp"wp" c° eqo dpcel»p"fg"qdlgwxqu"i gpgtcrgu. c"eqvtq" { "rcti q" r m| q. "s wg"r" wpcdp" c" guwcdrgegt" c"Vq{ qvc"eqo q"wp"mff gt"i mrcn" f gucttqmt"r" tgr wcel»p"fg"r"go r tgu"dcucf c"gp"uw"ecrk cf " { "eqpvdwt" c"r" geqpqo "lcr qpguc" r ctvk"fg"r" r tqf week»p"gp"o cuc'0"

³⁵³"C"uw"xgi. "c" r ctvk"fg"r"gpvtcf c"fg"lcr »p"gp"r"Qti cpk cel»p" r ctc"r"Eqqr gtcel»p" { "gn'F gucttqmq"Geqp»o leq" *QEF G+ "gp"3; 86."gn'r c"ju"mri t»"o c { qtgu"lcekf cf gu"r ctc"lpxgt" { "mgxct"qr gtcekpgu" c"Eqgc" f gn'Uwt. "Vcky^a p" { " gn'guvq" f gn'uwf guf g"cul³⁵⁴»veq'0"

³⁵⁴"Cf go^a u. " f wcpvg" f lej q" r gt"qf q. "ru" go r tgu" cwqo qvtlegu" guvcf qwpk gpugu" os wg" { c" vgp"ep" dcmpegu" eqo gtekr"p"gi cwxqu"eqp"lcr »p" f gdlf q" c"ru"cnuc"vctkru" { "c"ru" f hlewncf gu"r qt" eqmect"uwu" r tqf wvqu"gp"gn' o gtecf q"lcr qp²u"eqo gp| ctqp" c" kpvtpguctug"gp"vpgt"uqekqu"mrcrgu"O"gn' twr q"O kuwkluj k"hwpcf q"gp"3: 92"r qt"wp" f gucgp"lpgvg"fg"wp" c"ho kkc" samurái. "hw"wpq"fg"mru"zaibatsu"o^a u" r qf gtququ"fg"lcr »p"ug"eqpxk"»gp"gn'uqekq" f qo kpcpv"87" +gp"wp" c"go r tgu"eqplwpc"eqp"Ej t { urgt"Eqtr qtcvxp. "r qt"m" s wg"mru"eqpegukpctku"fg"Ej t { urgt" eqo gp| ctqp" c" xgpf gt"gn' r gs wq" c"cwqo »xkif g"O kuwkluj k"gp"gn'o gtecf q"guvcf qwpk gpugu" Nwgi q. "Kw" w"cegr" w" hqto ct"qtvc"go r tgu"eqplwpc"eqp"l gpgtcn'O qvtu"laj puqp."3; : 4+0Nq"ewtlqu"fg"guvg"r tqeguq"gu" s wg"gn'o kuo q" pq"hw"r rcpk"cf q"pk"cxrcf q"r qt"gn'O K/Kgp"wp"r tpekr kq. "c" s wg"mru"r rpgu"fg"2"ug"r ctc"r"kp f wutk"cwqo qvtk" gtecp"gu"o wct" c"uq"m" f qu"mff gtgu"pcekqpcrgu"p kuup" { "Vq{ qvc"Ukp"go dcti q. "mru"o kuo qu"i twr qu"go r tgu"ktqu" s wg" j cd"p"ukf q" r tqvgi kf qu" { "ho gpvcf qu"r qt"gn'O K/K"eqo q"O kuwkluj k"Kw" w"ug"xlktq"p"hwgtc" f gn'p"i qekq"cwqo qvtk" { " f guclctqp" c"r"dwqetcekl" hqto cpf q" f lej qu"joint-ventures"laj puqp."3; : 4+0"

r ctc'eqo r gvk'c'pkxgnlpvgtpcelqpcn'eqp'rcu'r tpekr crgu'cwqo qv'legu'gp'gn'v wvf q'*J glo . '4242-0'
 Gnr tko gtq'f'g'gmqu'hwg'eqp'J kq'q'O qvqtu. f'gf'kecf'c'r tpekr cm gpv'c'rc'r tqf week'p'f'g'xgj 'f'wvqu'
 eqo gtekr'gu'i tcpf'gu.'{ 'mgi q'eqp'F'clj'cvuw'O qvqt. "gur'gekr'k'cf'c'gp'rc'r tqf week'p'f'g'o kpk/
 xgj 'f'wvqu'*kei cars+'*xgt'Vcdrc'KKK3-0'F'g'gug'o qf'q.'c'r'ctvk'f'g'f'lej'cu'crkcp| cu'eqqr'gtcv'xcu'
 rcu'go r'rgucu'r'gtv'pge'k'p'v'gu'cn'I twr'q'Vq{ qvc'qht'ge'f'ep'v'qf'q'gn'cdcp'leq'f'g'vr'qu'f'g'xgj 'f'wvqu'
 *Vq{ qvc.'4234-'Vj'g'P'gy 'l' qtm'Vko'gu.'43'42'13; ; 7-0"

Tabla III-1 – Empresas del Grupo Toyota*

Compañía	Inicio	Actividad principal
Daihatsu Motor Co.	1907	Fabricación y venta de vehículos de pasajeros, vehículos comerciales, vehículos especiales y repuestos.
Toyota Industries Corporation	1926	Fabricación y venta de maquinaria textil, automóviles, vehículos industriales y otros productos así como el negocio logístico
Toyota Motor	1937	Fabricación y venta de vehículos de pasajeros, vehículos comerciales, carrocerías y piezas de automoción
Aichi Steel Corporation	1940	Fabricación y venta de aceros especiales, productos de acero forjado y componentes electromagnéticos.
Hino Motors	1942	Fabricación y venta de camiones, autobuses, vehículos comerciales ligeros, turismos, motores y repuestos.
Toyota Auto Body Co.	1945	Fabricación y venta de carrocerías y componentes para turismos, vehículos comerciales y vehículos especiales
Toyota Tsusho Corporation	1948	Comercio nacional, importación y exportación, y comercio internacional de diversos productos, contratación de construcción y de seguros.
Denso Corporation	1949	Fabricación y venta de componentes automotrices y otros componentes eléctricos, equipos de aire acondicionado, equipos industriales en general y equipos eléctricos.
Toyoda Gosei Co.	1949	Fabricación y venta de productos de caucho, plástico y uretano, semiconductores, productos eléctricos y electrónicos y adhesivos.
Toyota Boshoku Corporation	1950	Fabricación y venta de partes interiores de vehículos y filtros automotrices, así como componentes de tren motriz y textiles.
Towa Real Estate Co.	1953	Propiedad, gestión, venta, arrendamiento y gestión subcontratada de bienes inmuebles e inversión en valores negociables.
Toyota Central R&D Labs	1960	Investigación, ensayo e investigación en diversos campos relacionados con el desarrollo y uso de tecnologías básicas.
Aisin Seiki Co. (ahora Aisin Corporation)	1965	Fabricación y venta de repuestos automotrices, equipos de vivienda, sistemas de energía y productos para discapacitados y personas mayores.

Toyota Financial Services	2000	Provisión de servicios financieros para la compra de vehículos.
Toyota Housing Corporation	2003	Desarrollo tecnológico, producción, venta, construcción y servicio postventa de viviendas
JTEKT Corporation	2006	Fabricación y venta de sistemas de dirección, cojinetes, componentes de transmisión, máquinas herramienta y dispositivos de control electrónico.
Toyotsu Machinery Corporation	2009	Ingeniería, equipamiento mecánico, maquinaria textil, fábricas inteligentes, y energías renovables.
Toyota Motor East Japan	2012	Fabricación y venta de vehículos de pasajeros, vehículos comerciales, carrocerías y piezas de automoción

Hæpvg<Vq{ qv'I rjdcif'

, Gpvgpf kf q'eqo q'cs wgm'u'go r t gcu'gp'hu's wg'Vq{ qv'r qugg'o ^ u'f'g'wpc'r ct vkr cek'p'uw'gtlqt'cn'32' 'ulp'eqpvt' uwdul' lctku'0'

Tabla III-2 - Fábricas de Toyota dentro de Japón

Nombre	Locación	Comienzo de operaciones	Productos (2019)
Honssa	Aichi	1938	Partes forjadas, sistemas híbridos, pilas de combustible y chasis.
Toyota Auto Body	Aichi	1945	Land Cruiser, LX, LM (Incl. HEV), Hiace, Alphard (Incl. HEV), Vellfire (Incl. HEV), Noah (Incl. HEV), Voxy (Incl. HEV), Esquire (Incl. HEV)
Motomachi	Aichi	1959	Crown (Incl. HEV), LC (Incl. HEV), Mirai y GR Yaris
Kamigo	Aichi	1965	Motores
Takaoka	Aichi	1966	RAV4 (Incl. HEV), Harrier (Incl. HEV), Prius, Corolla (Incl. HEV), Corolla Touring (Incl. HEV)
Miyoshi	Aichi	1968	Piezas de transmisión piezas forjadas y piezas de motores
Schimoyama	Aichi	1975	Motores, turbos, convertidores catalíticos y depósitos de hidrógeno
Kinu-ura	Aichi	1978	Piezas de transmisión
Tahara	Aichi	1979	LS (Incl. HEV), IS (Incl. HEV), GX, RC (Incl. HEV), NX (Incl. HEV), Land Cruiser, Land Cruiser Prado, 4Runner y motores

Teiho	Aichi	1986	Equipamiento mecánico, molduras y modles de resina y piezas forjadas
Toyota Motor Kyushu	Fukoka	1992	ES (Incl. HEV), CT, RX (Incl. HEV), NX (Incl. HEV), UX (Incl. HEV y BEV), Motores y partes del sistema híbrido
Toyota Motor Hokkaido	Hokkaido	1992	Transmisiones y otras piezas
Este de Japón	Miyagi	2012	Aqua, Sienta (Incl. HEV), C-HR (Incl. HEV), Porte, Spade, JPN TAXI, Century, partes de motores, Yaris (Incl. HEV), Corolla Axio (Incl. HEV), Corolla Fielder (Incl. HEV)

Hwgpvg<Hwo kq*4228+{"Vq{qvc"l mjdcrf)

"

Gp"guvg"eqpvzq"gzr cpukxq"Vq{qvc"cdtk»"pwgxcu"lf dtlecu"gp"lcr »p"ngi cpf q"j cuvc"; " r ncpvcu" gp" 3; : 2" *xgt" Vcdr» "44-0" Cf go "a u." eqo gp| »" c" cwo gpvct" eqpukf gtcdrgo gpvg" uwu" gzr qtvekpqgu" c"pwgxcu"o gtecf qu"eqo q"Vcky "a p."Vckrpf kc."Dtcukl{"r c"lgu" f grlO gf kq"QtkgpvO" Nc"o c{qt"r ctvg" f g"rcu"gzr qtvekpqgu" c"lpleku" f g"rc" f²ecf c" f g"3; 82"gtcp"wpkf cf gu"gpukf cu" eqo q"nku" f g"o qpvcg" *Completely Knock Down, EMF +r ctc"ugt" gpucd drcf cu"gp"qu" r c"lgu" ko r qtvcf qtgu" Guc" hqto c" f g"gzr qtvekp»p" ug" f gd" c" c"rcu" vtdcu" cn" eqo gtekq" f g" xgj "lwnqu" vto kpcf qu" {"rcu" r q"lkecu" f g"r tqo qek»p" c"rc" r tqf week»p" f qo² uvek" f g"r c"lgu" ko r qtvcf qtgu" eqo q" Dtcukl" O² zlek. ³⁵⁵Uw^a htkc."Cwutcrk."gpvtg"qtqu" *xgt" Vcdr» "45-0"

Gp"3; 7: "rc" ko r qtvekp»p" f g"nku" r ctc" gn'gpucd drcf g" f g" xgj "lwnqu" EMF "hwgtqp" r tqj kdkf qu" r qt" grl" qdkgtpq" f gucttqnkuc" f g" Lwuegnkq" Mwdkuej gn'gp" Dtcukl" Guc" ngx»" c" s wg" Vq{qvc" f gekf c" rc" lpuvcrk»p" f g"rc" ugi wpc" r rcpvc" f g" r tqf week»p" hwgtc" f g" lcr »p." hngi q" f g" wp" r gs wg" q" vcmgt" gp" Ej kpc. ³⁵⁶r ctc" rc" hdtlecek»p" f g" uw" o qf grq" Ncpf "Etwtugt" s wg" nngi q" eco dl»" uw" pqo dtg" c" Dcpf gkcpvg" *xgt" Vcdr» "45-0"

Gp" qu" rt»zko qu" c"o qu" ug" uwo ctqp" rcu" lf dtlecu" f g" Uw^a htkc" {" Cwutcrk." tgur gevxco gpvgO Gp" gn'Anko q" f g" guqu" r c"lgu. "f qpf g" j cd" c" cevxcu" r q"lkecu" f g" r tqo qek»p" f g" r tqf week»p" mrcn" f g" qu" xgj "lwnqu." Vq{qvc" nngi »" c" cewgtf qu" f g" gpucd drct" gn' 82' " f g" uwu" xgj "lwnqu" f g" r cuclgtqu" Eqtpc" {" Eqtqm" {" eqo r gpuct" gn' o cti gp" f g" ko r qtvekpqgu" eqp" gzr qtvekpqgu" f g" qu" xgj "lwnqu" vto kpcf qu" hwgtc" f g" Cwutcrk" Gn'gpucd drcf q" f g" qu" xgj "lwnqu" m" tgrk" cdc" rc" go r tgu" mrcn" Cwutcrk"p" O qvt" kpf wutlgu" f g" rc" ewcn" Vq{qvc" r ctvekr cdc" eqp"

³⁵⁵"C" uw" xgj . "gp" O² zlek" ug" tgi kwtc" wpc" eqtw" gzr gtlgpek" f g" Vq{qvc" r tqf wekpq" q" o cs wlpctk" r ctc" rc" lpf wutk" vgz vki" gp" cuqekcel»p" eqp" gn' Gucf q" o gzlecpq" f wcpvg" rc" f²ecf c" f g"3; 72" *f " a o gu" {" Qrkgtc" Ci wkrct. "4242+

³⁵⁶"Gp"3; 58. "uq" wpqu" o gugu" f gur w" u" s wg" ug" eqo gp| ctc" c" hdtlect" gn' eco k»p" I 3" f g" Vq{qvc. "rc" go r tgu" {" c" eqo gp| cdc" c" gzr qtvc" wpcu" r qecu" wpkf cf gu" c" Ej kpc" Nngi q. "gp"3; 59. "wpc" r gs wg" c" r rcpvc" f g" r ctvekpqgu" ug" lpuvcr»" gp" Uj cpi ck" s wg" hngi q" ug" vtcpuhqto »" gp" wpc" r rcpvc" f g" gpucd drcf q" f g" xgj "lwnqu" Nngi q. "gp"3; 5: . "qvc" r rcpvc" f g" Vq{qvc" hng" lpuvcrf c" gp" rc" ekwf cf "Vcpllp" vco dl»p" gp" Ej kpc" *Vq{qvc. "4234-0"

32' 'f gn'r cs wvg"ceekpctkq0'Guvqu'uqp'mqu'r tko gtqu'cpvgegfpvqu'f g'cewgtf qu'f g'Vq{ qvc"eqp" mu'i qdkgtpqu'neecrgu'gp'f qpf g'ug'kpuvncdcp'rcu'hdckrgu'f g'rc'o wmkpcekqpcn'Vq{ qvc.'4234-0'

Gp'gn'o gtecf q'cul' vkeq'f wtcpvg'rc'f²ecf c'f g'3; 72'ug'j'lekgtqp'cni wpcu'gizr qtveekp'p'c' f kwpvqu'r c'f'ug'u's wg'gtep'qvqti cf cu'eqo q'tgr ctcekqpgu'r qt'mqu'f c' qu'qecukqpcf qu'f wtcpvg'rc' i wgttc.'m'ewen'r gto kks'cdtk'f lej qu'o gtecf qu'r etc'rc'r quvgtkqt'gizr qtveekp'p'eqp'xqn'ao gpgu' o c{qtgu'0'C"uw'xgl.'c'r ctvt'f g'mqu'r tqi tco cu'f g'kpegpv'kxq" c'rc'tcf kecekp'f g'go r tgu'cu' o wmkpcekqpcrgu'kpf wutkrgu'gp'Vckrcpf k.'Vq{ qvc'guvcdngek'wpc'r rcpw'f g'r tqf weekp'gp'3; 840' Cu'f'gp'guvqu'r tko gtqu'c' qu'rcu'r rcpw'f g'Vckrcpf k'{'C wutcrk'gtep'rcu'o 'a u'i tcpf gu'f g'Vq{ qvc' hwgtc'f g'Lcr »p0'

Gp'Gwtqr c.'ug'eqo gpl ctqp'c'gizr qtvt'{"xgpf gt'xgj 'f'wru'vgt'o kpcf qu'gp'F kpc'o ctec'{" J qrcpf c'gp'3; 84'{"3; 850'Nwgi q.'Vq{ qvc'wu»'c'mqu'r c'f'ug'u'pq'r tqf wvqtgu'f g'xgj 'f'wru'eqo q' D²ni kec'{"Uwk'c'eqo q'dcugu'f g'xgpw'u'r etc'Gwtqr c0'Gp'3; 8: "eqo gpl »'rc'gizr qtveekp'f g' wpkf cf gu'f g'EMF'gp'Rqtwi cn'eqp'wp'cewgtf q'eqp'rc'go r tgu'c'Ucrkcf qt'Ecgcpcq'KO OX00'r etc' gn'gpuc'o drc'lg0'Rqt'qvtq'rcf q.'gp'Guvf qu'Wpkf qu'rc'f go c'p'f g'xgj 'f'wru'f g'Vq{ qvc'etge'f' cegngtcf co g'p'gp'rc'f²ecf c'f g'3; 82'r cucpf q'f g'6022'wpkf cf gu'gp'3; 86'c'626022'gp'3; 93' eqpxk'v'k'pf qug'gp'gn'r t'kpek'cn'f gu'k'p'f g'gizr qtveekp'f g'rc'ht'o c.'r gtq'vqf cx'f'uk'p'kpi wpc' wpkf cf 'r tqf wv'k'c'gp'gn'r c'f'u'pqt'vgo g'k'ecp'q0"

" Gp'3; 92'ug'uwo ctqp'o 'a u'pcekqpgu'f g'pvtq'f g'rcu'ewcrgu'Vq{ qvc'tgcrk'cdc'ce'v'k'f cf gu'f g' gpuc'o drc'lg'mgi cpf q'c'35.'gzeqr wcpf q'c'Lcr »p'*xgt'Vcdrc'KK5-0'Cf go 'a u.'gp'guc'f²ecf c' o wej qu'r c'f'ug'u'gp'f wtgekgtp'uwu'r q'f'k'ec'f g'r tqo qekp'f g'r tqf weekp'pcekqpcn0'Rqt'glgo r m.' Uw'at'k'ec'guvcdngek'gp'3; 92'wp'r rcp'f g'cwo g'p'v'f g'r tqf weekp'f g'xgj 'f'wru'neecrgu's w'f gd'f'c' c'rc'cp| ct'gn'88' "gp'3; 980'Rqt'qvtq'rcf q.'C wutcrk'gzki k'gp'3; 97's w'g'r etc'3; 9; "gn': 7' "f g'rc' r tqf weekp'f g'xgj 'f'wru'f gd'f'c'ugt'neecrk'cf c'gp'gn'r c'f'u'0'Rctc'r qf gt'mgi ct'c'gu'qu'r qtegp'vclgu'f g' r tqf weekp'p'cekqpcn' Vq{ qvc' f gd'f'c' k'eqtr qtct' o 'a u' r k'gl cu' pcekqpcrgu' gp' uwu' xgj 'f'wru' cwutcrk'cpqu'eqo q'o qvtq'gu'q'uk'vgo cu'f g'v'cp'uo k'k'p'0'Cu'f'co r r'k'»'uwu'r rcpw'cu'gp'C wutcrk' hcdtk'ecpf q' guvqu'uk'vgo cu' gp'3; 9; 0' Cf go 'a u.'eqo r t»' wpc'o c{qt' r tqr qte'k'p'f gn'r cs wvg' ceekpctkq'f g'uw'joint-venture"X+ "C wutcrk'cp'0' qvt'k'f wut'k'gu.'eqpxk'v'k'pf qug'gp'gn'uqekq' o c{qt'kctkq0'⁵⁷"

" Gp'u'p'v'g'ku.'f wtcpvg'gn'r gt'f'q'f g'r qui wgttc'Vq{ qvc'c'v'c'x'gu»'wpc'g'v'c'f g'etgeko k'ep'v'q' gizr qpgpek'cn'gp'gn'o cteq'f gn'f gucttq'm'geq»o k'eq'g'k'pf wut'k'cn'l'cr qp²u0'Gp'g'uc'h'c'ug'rc'go r tgu'c' co r r'k'»'uw'i co c'f g'r tqf wv'qu.'o w'k'r r'k'»'uw'ecr c'ekf cf "r tqf wv'k'c'f g'pvtq'f gn'r c'f'u'cdtk'gpf q'

³⁵⁷"Gp'H'k'r k'pcu'ug'cxcp| »'gp'rc'r tqf weekp'neecrn'eqp'uw'uqekq'neecrn'F g'nc'0' qvt'Eqtr qt'v'k'p'{"gp'k'f q'p'g'uk'ug' j k' q'dclq'gn'LX'RV0'Vq{ qvc'Cu'c'0' qvt'0'

pwxcu'r rpxcu'o cpwcewtgtcu.'kpetgo gpw'lwu'gZR qtvekpqgu'{'eqo gpl »c'tgcrk ct'cevkxf cf gu' f g'gpucio drcf q'f g'uwu'xgj 'f'wru'gp'wpc'f qegpc'f g'r c'f'guo'Cu'f' guvc'gvr c'f g'etgeko kgpv'{' eqpuqrf cek»p'hwg'rc'cpvguc'f g'rc'kpvtpcekqpcrk cek»p'f g'Vq{ qvc.'{'rc'kpf wutkc'cwqo qvk' lcr qpguc'gp'i gpgtcn'{'grleqo kgp| q'f g'rc'eqo r gvpekc'r qt'grhkf gtc| i q'o wpf kcn's wg'ug'f gur ngi »' gp'rcu'r t»zko cu'f²ecf cu'0' " " "

3.4 – Producción local en mercados clave (1973-1990)

C'r ctvkt'f g'rcu'etkuku'f gn'r gvt»rgq'gp'rc'f²ecf c'f g'3; 92'{'f g'rc'tggutwewtcek»p'f gn' ecr kcrkuo q' o wpf kcn' Vq{ qvc' ko r ngo gpw' eqo r ngvo gpvg' uw' ukvgo c' f g' r tqf week»p.' guvcdrgekpf q'wp'o² vqf q's wg'hwpekqpcdc'gp'dcug'c'rcu'f go cpf cu'f gn'o gtecf q'{'grko kpcdc'rc' uqdtgr tqf week»p'0' Cu'f' rc' hto c' tgrtgugp»' rc' eqpf gpucel»p' f g' i tcp' r ctvg' f g' rcu' vcpuhqto cekqpgu's wg'ug' guvcdep'r tqf wekpf q'c'pk»gn'i nqdcn'ukgpf q'rc'xcpi wctf kc'f g'rcu' r t^a exkcu'f g'*producción flexible* *Eqt kv.'4222=Ngg'{'Lq.'4229+.'Guvc'eqo r ngv'ko r ngo gpvcek»p' f gn'VRU'gp'gn'o cteq'f g'mqu'eco dkqu'f g'mqu'ukvgo cu'f g'r tqf week»p'o wpf krgu'ng'r gto kks'c'rc' go r tguc' qdvpgt' tguwncf qu' uwo co gpvg' hcxqtcdrgu.' cwo gpvcpf q' rc' r tqf wevkxf cf "{'rcu' i cpcpeku'0'

Cf go^a u.'rcu'etkuku'f gn'r gvt»rgq'rgu'f kgtqp'wpc'xgpvcl'c'rcu'xgj 'f'wru'o^a u'ghlekpgv'gp' gn'wuq'f g'eqo dwukdrq'gp'mqu'f g'GGWW'{'Gwtqr c.'ugi o gpvq'gp'gn'ewcn'mqu'xgj 'f'wru'lcr qpgugu' j cd'f'p'cf s wtkf q'wp'ko r qtvcvq'f qo kpkq'»J glo .'4242+0Cu'f'gp'3; ; 2'Lcr »p'ug'eqm»'eqo q'gn' r tkpek cnr tqf wevqt'f g'xgj 'f'wru'f gn'o wpf q'eqp'32'o kmppgu'f g'wpl cf gu'hcdtlecf cu.'uwr gtcpf q' c'Guvcf qu'Wpl qu'gp'gn'r qf kq0F g'guc'ektc.'3.; 3'o kmppgu'gtcp'gZR qtvcf qu'c'Guvcf qu'Wpl qu.'gn' ewcn'tgi kmtcdc'ugtqu'f² heku'eqo gtekrqu'eqp'Lcr »p⁰58'C'tc'f'f g'f kej c'ukwcek»p.'gn'i qdkgtpq' f g'Tgci cp'rcpl »'tgutleekqpgu'c'rcu'ko r qtvekpqgu'f g'xgj 'f'wru'lcr qpgugu'{'.'hwgi q'f g'ctf wcu' pgi qekcekqpgu.'GGWW'{'Lcr »p'ngi ctqp'c'wp'cewgtf q'f g'guvcdrgegt'wp'ewr q'f g'gZR qtvekpqgu' f guf g'Lcr »p'c'GGWW's wg'kdc'f g'3.8'o kmppgu'gp'3; ; 3"3.: 7"gp'3; ; 6⁰59"C'r ctvkt'f g'guvcu' tgutleekqpgu'{'f g'r tgukqpgu'i wdgtpco gpvcrgu.'rcu'hto cu'lcr qpgucu'eqo gpl ctqp'c'kpuvrcr' r rpxcu'r tqf wevkcu'gp'GGWW.'o gtecf q's wg'j cuvc'gug'o qo gpvq'cdcuve'f'p'gpvgtco gpvg'c'tcx²u' f g'gZR qtvekpqgu'³⁵: »Mwo qp.'3; ; 4+0Cu'f'J qpf c'{'P kuucp'cdtkgtp'f^a dtleku'gp'3; ; 2'{'Vq{ qvc'

³⁵⁸ Gn'o qf gn' o^a u'ko r qtvcf q'r qt'GGWW'gtc'rc'r len'w'r 'J kwz0C'r ctvkt'f g'uw'²zkkq.'Vq{ qvc'rcpl »'pwexqu'o qf gn' c'eqo dwukdrq'f kgugn'xteek»p'c'ewctq'twgf cu'{'f qdrq'ecdlpc'0'Gp'3; ; 7"ug'tggo r rc| »'rc'J kwz'r qt'rc'r len'w'r " Vceqo c.'ko r rkecpf q'wp'tgf kug' q'f gn'xgj 'f'wru'eqp'wpc'xgtul»p'o^a u'tghkpcf c'{'o gpqu'qtkepv'cf c'cn'tcdclq'{' vcpur qtvg'f g'o gtece'f'cu'0'

³⁵⁹ Gr'ewr q'hwgi q'ug'co r r»'c'4.45'o kmppgu'f'ug'cdcpf qp»'tgekr p'gp'3; ; 50'

³⁵ 'Ugi Àp'Mwo qp'»3; ; 4+rcu'go r tgucu'lcr qpgucu'gp'i gpgtcn'{'Vq{ qvc'gp'r ctvkwrcr.'{'c's wg'vg'f'c'wpc'r qulekp'o^a u' eqpugt'xcf qtc's wg'P kuucp'{'J qpf c'gp'gug'ug'w'f q/. 'gtcp'tgvegp'v'c'kpuvrcr'r rpxcu'r tqf wevkcu'hwgtc'f g'Lcr »p' r qt'go qt'c'pq'r qf gt'tgr tqf wek'mqu'ukvgo cu'f g'r tqf week»p'mi tcf qu'gp'gn'r c'f'f g'qtki gp0Rqt'guvqu'o qvkvu.'gn'

eqo gpl »"wp"lX"eqp"l O "r ctc"r"r tqf week»p"gp"gn'r c"u" f gn'pqtvg³⁵: "F g"vqf qu"o qf qu."gp"3; : 8"
Vq{qvc" f gekf k»"cdtk"uwu"r tqr kcu"r rcpvcu"gp"GGWW" {"Ecpcf^a 0' Vq{qvc" Gwcf qu" Wpkf qu"ug"
eqpegpvt»"gp"r"r tqf week»p" f g"uwu"o qf gnu"Eqtqmc."Eco t{."Egrkcc." {"J kwz"r qts wg"gtcp"
cs wgmqu"eqp"qu's wg"qu'r tqf wevtgu'pqtvgco gtlccpqu'pq'r qf "cp"eqo r gvt'lf ekro gpvg⁶²"
" "

cwqt'ectcevtk c'c"Vq{qvc"gp"3; : 2'eqo q'wp'glgo r m'f g'qu' *modelos de multinacionales reticentes* ³⁴Mwo qp."3; ; 4-
: 3-0'

³⁵: "Ug"eqo gpl »"eqp"eqpxgtucekppgu"eqp"Hqtf "r ctc"tgcrlk ct"wp"o qf gnu"gp"eqplwpvq"gp"GGWW'r gtq'f kej q'cewgtf q"
Htcccu»"r qt'iq'ewcn'ug'gucdrgek»"eqp"l gpgtcr'O qvqtu'wp"lX"eqo q'ugi wpf c'qr ek»p0'

³⁶²"C"uw'xgl . 'lco dlk'p'ug'kpucn»"wpc'r rcpvc'f g"Vq{qvc'r ctc"r"r hcdtkccel»p'f g'o qvqtgu"{"glgu." {"c'r ctvt'f g'r tgukppgu"
f gn'i qdlgtpq" f g"GGWW."ug"eqpvtcvtqp"wpc"i tcp"ecp'kf cf "f g"cwqr ct'wcu"guvcf qwplf gpugu'f g"hqto c'vni's wg"gn"
eqpvplf q'iqecnlf gn'Eco t{ 'ngi »"cn'97' "gp"3; ; 30'

Tabla III-3 - Razones de las decisiones de radicación de filiales de Toyota en distintos países del mundo

País	Año	Tipo de entrada ⁱ	Producto ⁱⁱ	Razones de la instalación	Activa al 2019	Nivel de importancia ⁱⁱⁱ
China	1937	PC	C+P	Demanda del país; Pequeñas actividades de ensamblado	Sí	Alto
México	1953/2004	JV	MT (1950s) C+A (2000s)	Estímulos del gobierno local (1950); Periferia del mercado principal con menores costos que el país demandante (2000); Periferia regional para la fabricación de autopartes (2000); Acuerdos de libre comercio (2000)	Sí	Medio
Brasil	1959	JV	C	Políticas comerciales proteccionistas a productos automotores	Sí	Medio
Sudáfrica	1962	L	C+P	Políticas comerciales proteccionistas a productos automotores	Sí	Medio
Australia	1963	JV	P	Demanda del país; Políticas comerciales proteccionistas a productos automotores	No	-
Tailandia	1964	JV	C+P	Incentivos del gobierno local	Sí	Alto
Perú	1967	JV	C+P	Políticas comerciales proteccionistas a productos automotores; Incentivos del gobierno local	No	-
Nueva Zelanda	1967	PC	C+P	Demanda del país; Políticas comerciales proteccionistas a productos automotores	No	-
Portugal	1968	JV	C	Periferia del mercado principal con menores costos que el país demandante; Costos de transporte	No	-
Malasia	1968	L	C+P	Demanda del país	Sí	Bajo
Indonesia	1970	JV	C+P	Demanda del país	Sí	Alto
T. y Tobago	1971	L	C+P	Demanda del país y la región	No	-
Kenya	1977	L	C+P	Demanda del país y la región	Sí	Bajo
Venezuela	1981	JV	C+P	Demanda del país; Políticas comerciales proteccionistas a productos automotores	Sí	Bajo
Zimbawe	1981	L	C+P	S/D	No	-
Zambia	1983	L	C	S/D	No	-
EEUU	1984	JV	C+P	Demanda del país; Políticas comerciales proteccionistas a productos automotores	Sí	Alto
Uruguay	1985	L	C+P	S/D	No	-

India	1985	JV	C	Demanda del país; Incentivos del gobierno local	Sí	Medio
Bangladesh	1985	L	C	S/D	No	-
Ecuador	1986	L	C	S/D	No	-
Canada	1988	PC	P	Demanda regional	Sí	Alto
Taiwán	1988	JV	C+P	Incentivos del gobierno local	Sí	Medio
Alemania	1989	L	C	Políticas comerciales proteccionistas a productos automotores; Apreciación del yen	Sí	Medio
Filipinas	1989	JV	C+P	Acuerdos de libre comercio; Incentivos del gobierno local	Sí	Bajo
Pakistán	1990	JV	C+P	S/D	Sí	Bajo
GB	1992	PC	P	Políticas comerciales proteccionistas a productos automotores	Sí	Medio
Argentina	1997	JV	C	Demanda regional; Acuerdos de libre comercio	Sí	Medio
Vietnam	1997	JV	P	Acuerdos de libre comercio	Sí	Bajo
Francia	1998	PC	P	Demanda del país; Incentivos del gobierno local	Sí	Medio
Turquía	1998	PC	P	Periferia del mercado principal con menores costos que el país demandante	Sí	Medio
República Checa	2002	JV	P+A	Periferia regional para la fabricación de autopartes	Sí	Medio
Rusia	2005	PC	P	Demanda del país	Sí	Bajo
Polonia	2005	PC	A	Periferia del mercado principal con menores costos que el país demandante; Periferia regional para la fabricación de autopartes	Sí	Bajo
Egipto	2012	JV	P	Demanda del país	Sí	Bajo

Hvgpv<grcdqtccl>p'r tqr lc"gp'dcug'c'lphto cel>p'f'g'Vq{qc'4234+;Hqo kq'4228+;Mwo qp'3; ; 4+'{ 'Vq{qc'I mdcn'4234+0'
 k'Vkr q'f'g'gpvtcf c'<LX<Lqlpv'Xgpwtg.'RE<Rtqr lgf cf 'Eqo r ngv'{'N<Nlegpek'Tkk+Rtqr wevq<E<xgj 'ewqu'eqo gtelcrgu.'R<xgj 'ewqu'f'g'r cuclgtqu=E- R<xgj 'ewqu'eqo gtelcrgu'{'
 f'g'r cuclgtqu=C<Cwqr ctvgtu'{'O V<O cs wptkc'Vgz w'Ikk+P kxgnf'g'ko r qt vpekc'r tqf wevxc'f'c'r'qt'rc'r'rqf week'p'cewo wrc'c'gpvtg'422; '{ '423; <Dclq<3'c'922022=O gf kq<
 922022'c'50722022=}'Cnq<50722022'gp'cf grcpv0

Cuko kuo q. 'f wtcpvg'rc'f²ecf c'f g'3; : 2'VO E'ug'gzr cpf k»'gp'f kmpqu'r wpqu'f gn'r rpgvc"
cf go^a u'f g'Co² tlec'f gn'P qtvg0Gp'Gwtqr c. 'f g'o cpgtc'uko krc'c'GGWW.'ug'ko r wukgtqp'eqpvtqgu"
c'rcu'gzr qtvekpqu'f g'xgj 'f wqu'f g'Lcr »p'gp'3; : 8. 'f g'hqto c'cn's wg'ug'kpegpvx»'rc'r tqf week»p"
mqecn'gp'gn'eqpvkpgpvg0Cu'f'ug'eqo gp| »'rc'hcdtkecek»p'f g'J kwz "{ 'Vctq"gp'3; : ; 'c'r ctvt'f g'wp"
cewgtf q'eqp'Xqmuy ci gp'gp'Crgo cpkc'»Mwo qp.'3; ; 4+0C'uw'xgl . 'gp'I tcp'Dtgv° c'ug'gucdrgek»"
rc'etgcek»p'f g'wpc'r rcpw'r ctc'rc'r tqf week»p'f gn'o qf gm'Ectkpc'G'f 'hwgi q'f gn'Eqtqmc."{ 'qvtc"
h' dtlec'f g'r tqf week»p'f g'o qvqtgu'gptg'3; ; 4'f'3; ; 50Cu'f'I D'ug'gucdrgek»'gp'guc'gvr c'eqo q"
rc'dcug'f g'r tqf week»p'f { "cdcugeko kpvq" c"o wej qu"qtqu"r c'f'ugu'f g'Gwtqr c0'Nwgi q'f g'wpc"
eqo r gvpekc'eqp'P kuucp.'gp'3; ; : "Vq{ qvc'mi t»'ugt'rc"o c{ qt'r tqf wexqtc'f g'xgj 'f wqu'lcr qpuc"
gp'Gwtqr c0"

Gp'Vcky^a p. 'hwgi q'f g'wp'htceucf q'kpvpgv'f g'kpuvrccek»p'gp'gn'r c'f'ur³⁶³'ug'ngx»'c'ecdq'wpc"
cuqekcek»p'eqp'rc'vcky cpuc'»Mwq| wk'O qvqtu'c'r ctvt'f g'r q'f'f'kcu'f g'cvtceek»p'f g'ecr kcrngu"
hqt^a pgqu'gp'rc'kpf wutlc'cwqo qvtk'0Mwq| wk'ug'gpecti cdc'f gn'gpuc drcf q'f g'mu'xgj 'f wqu'f g"
Vq{ qvc'eqo q'gn\ ceg.'Eqtqpc'f 'F { pc0C'uw'xgl . 'r ctc'gn'f guettqm'f g'cwqr ctvgu'qecrgu'tgcrk »"
wp'LX'eqp'rc'r tqf wexqtc'f g'cwqr ctvgu'guc r cf cu'Hgpi { wpi 'Eqtr qtcvqp0Gp'Ej kpc'ug'tgcrk »"
wpc" eqqr gtcek»p' v'epkcc' eqp" Uj gp{ cpi "Lkpdgk' Cwqo qvkg' Eqtr qtcvqp" gp'3; ; 2' r ctc" rc"
r tqf week»p'f gn'o kpk'»o pldwu'J kceg0'Gp'kpf kc."Vq{ qvc'pq'mi t»'rc'cr tqdcek»p'r ctc'hcdtlect"
xgj 'f wqu'f g'r cuclgtqu'f { 'u»m'f wf q'ceegf gt'c'rc'cr tqdcek»p'f gn' qdktpq'r ctc'hcdtlect'eco kppgu."
gucdrgekpgf q'gn'LX'FEO/Vq{ qvc'Nko kfg' r ctc'r tqf wek'rc'eco kppgu'F { pc'gp'3; : 70F lej q"
pgi qekq'pq'hwg'gzkquq'f { "gp'3; ; 9'gucdrgek»'wp'pwgxq'LX'Vq{ qvc'Mktmunt'0 qvqt'Rtkxcv'Nf 0'
eqp'rc'kpf kc'Mktmunt'I tqwr . 'r ctc'r tqf wek'rc'o kpkcp'o wnr tqr »ukq'S wcrku'»Vq{ qvc.'4234+0'

Gp'gn'a tgc'f gn'uwf gwg'cul² vlek'vco dl² p'etgek»'rc'r tgugpek'f g'Vq{ qvc0Gp'Vckrpf kc.'ug"
hqtto ctqp'Vq{ qvc'CWq'Dqf { "Vj ckrcpf'Eq0'gpecti cf c'f g'hcdtlect'r ctvgu'guc r cf cu'f { "gn'LX"
Uko 'Vq{ qvc'0 cpwhcewtkpi 'Eq0f gf lecf c'c'rc'r tqf week»p'f g'o qvqtgu'r ctc'eco kppgu'r gs wg° qu0'
Gp' kpf qpukc"wxq"2zka' gn'xgj 'f wqu' o wnr tqr »ukq" Mkcpi "c"rc'xgl "s wg"ug'eqo gp| »'rc"
r tqf week»p'f g'o qvqtgu'gp'f lej q'r c'f'u's wg'hwgi q. 'tgur crf cf qu'gp'gn'cewgtf q'f g'hdg'eqo gtekq"
f g'rc'Cuqekcek»p'f g'P cekppgu'f gn'Uwf gwg'cul² vlek³⁶⁴'»CUGCP +.'ugt'f'p'gzr qtvcf qu'c'0 crukc'f { "

³⁶³Gp'Vcky^a p'c'r tlpek'ku'f g'rc'f²ecf c'ug'rcp| c'rc'Ng'f 'f g'Rtgo qek»p'f { 'F guettqm'f g'rc'kpf wutlc'CWqo qvtk'eqp"
gn'f gukpa'f g'f guettqmc'rc'kpf wutlc'cwqo qvtk' hwgi'gn'crkcp| c'eqp'ecr kcrngu'zvcplgtqu0Cf go^a u.'rc'ko r qtveek»p"
c'Vcky^a p'f g'xgj 'f wqu'f g'r cuclgtqu'gucdr'f tqj klf c'f gdf q'c'hw'r tqdigo cu's wg'i gpgtcdc'gp'rc'dcrp| c'eqo gtekr0'
Rqt'gucqu'v'q'xqu.'Vq{ qvc'r tqr wq'cf j g'kug'c'f lej q'r rcp'gucdrgekpgf q'wpc'r rcpw'f g'r tqf week»p'eqp'gzr gcvkxqu"
f g'r tqf wek'422'v' kixgj 'f wqu'cpwcrngu'f { 'gzr qtvt'wp'47' 'f g'hw'o kuo qu0Gn'r rcp'ugt'f'ngxc'f q'c'ecdq'gp'cuqekcek»p"
eqp'rc'Eqtr qtcvqp'f g'Cegtqu'Ej kpc'»Ej kpc'UggriEqtr qtcvqp+.'eqo r c°'f'gp'rc'ewcr'gn'f qdktpq'f g'Vcky^a p'r qug'f"
wp'r qtegpvc'f g'uw'ceekppgu0Up'go dci q. 'gug'r tqf gev'htceuc'0'

³⁶⁴Gn'r tko gt'r tqvqem'f gn'f tgc'f g'Nkdtg'Eqo gtekq'f g'rc'UGCP »CHVC+'eqo gp| »'c'kputwo gpvtug'gp'3; ; 5. "{ "
eqpukc'gugpekcm gpvg'gp'rc'hdgtcrk'cek»p'i tcf wcrf g'rc'eqo gtekq'v' cpwhcewtgtq'kvtcl qpc.'j cuc'crecp| ct'gn'rcpi q"
f g'2'c'7' 'f g'r tqvgeek»p'ctcpegrtkc.'r ctc'r tqf wexq'eqp'wp'eqpvkpf q'o 'f'pko q'tgi kpcn'f gn'62' "{ 'gp'wp'r rc| q"

Lcr »p" o kuo q0' Gp" Hkr kpcu" ug" etg»" gn' LX" Vq{ qvc" O qvqt" Rj kkr r kpgu" Eqtr qtcvkap" r ctc" gn' gpuco drcf q'f g'hqu'o qf gmq'Eqtpqc. 'Eqtrqnc.'{ 'Nkgceg0Gp'O crukc. 'ug'etg»" gn' LX" Vq{ qvc" O qvqt" Uf p0Dj f 0'gpecti cf q'f g'gpuco dmt'xgj 'fwmqu.'{ 'qvtq' LX. 'V(MC wqr ct u. 'gpecti cf q'f g'hdctlect" cwqr ct vgu" f g'f ktgeek»p. "nc" ewcn'ug" guxcdngek»" eqo q" nc" dcug" r tqxggf qtc" f g" guxcu" r ct vgu" r ctc" Vq{ qvc" gp" vqf c'rc' tgi k»p" f g' CUGCP 0⁶⁵"

" F g'gung'o qf q. 'gp'3; ; 2" Vq{ qvc" vgp'f 44' r rncpu' r tqf wevxcu' hmgte' f g' Lcr »p0C' r ct vkt' f g' nc' r tqf week»p" c' i tcp' guerc' gp" gn' gztcp' lgtq" { 'r ctc' kpeqtr qtct' r u' ectcevgt' jukecu' tgi kqpcngu' gp" rqu' xgj 'fwmqu. 'Vq{ qvc" guxcdngek»' egpvtqu' f g' kpxguki cel»p" { 'F gucttqmq' *K F -hmgte' f gn' c' u' *xgt" Vcdrc" 2/7" f gn' Cpgzq" Guvcf 'jukeq +0' Cu' f' gp" GGWW" ug" guxcdngek»" gn' Vq{ qvc" Vgej plecn' Egpvt. " WUC0' kpe0" wp" egpvtq" f g' K F " gp" Ecn' hqtplc" f qpf g" ug" gxcnwcdc" nc" eqo r cvdknk cf " f g" rqu" xgj 'fwmqu' r ctc' gn' b gtecf q' pqt vgo gtecpq⁶⁶ C f go^a u. 'gp'3; ; 5" Vq{ qvc" cdtk»" uw' egpvtq' f g' vugvq" f g' eco kqpgu' gp" Ctk' qpc. " GGWW0Gp" D² ni kec. 'ug'etg»" Vq{ qvc" Gwtqr g" Qh' h' eg" qh' Etgcvkap" eqo q" wp" egpvtq" f g' f kug^o q" r ctc" Gwtqr c0C" f kgt gpekc" f g' o vej qu" o qf gmq' f g' f kug^o q" eqtr qtcvxxq" f g' o wmkpcekqpcngu. 'f qpf g' r u' hkr r qu' gztcp' lgtcu' tgr rncp' r culxco gpv' hqu' ukungo cu' f g' r tqf week»p" f gn' b gtecf q' kpvtpq" q" gur gtcp' r u' f gekukqpgu' f g' r ecuc" o cvtk. " Vq{ qvc" hmg" gxqmwkqpcpf q" eqp" wp" o qf gmq' f g" o c { qt' kpf gr gpf gpekc" f g' u' uw' dukf ktkcu' gp" vgo cu' f g' K F 0F g" gung" o qf q. " r u' hkr r qu" r wgf gp" wkr k' ct" rqu" uwdukf kqu" gztcp' lgtqu" r ctc" f gucttqmq" pwxcu" vepqmqi 'f u. ³⁶⁷" hqto^a pf qug' wpc' tgf " f g' er tgp' k' clg" gp" r c' ecf gpc" i mdcn' *O eO kncp. "423; +0'

" Gp' tguwo gp. 'gp' guxcu' Anko cu' f² ecf cu' Vq{ qvc" etgekc»" cegrntcf co gpv' gp' dcug' uw' b² vqf q" f g' r tqf week»p" hngz kng. " gn' ewcn' ug" eqpxk' k»" gp" wp" r ctc' f ki o c' r tqf wevxxq" gp" r c' pwxgc" gxcr c' f gn' ecr kcrkuo q0' Guvc' hkr o c' hkr gt»" wp" r tqeguq" f g' f gucttqmq" f g' r kpf wutkc" cwqo qvtk' " lcr qpguc" gp" i gpgtcr' s wgf gur rnc | »" c' GGWW" f gn' r qf kq" f g' r tqf week»p" f g' xgj 'fwmqu' 0C" uw' xgl. " f wtcpv' g' guxcu" f² ecf cu' rnc" o wmkpcekqpcn' ug" gztcp' lgtcu' k»" kpekcpf q" qr gteckqpgu' r tqf wevxcu' gp" f k' k' vqu' r c' f ugu. " r t' k' ekr cm gpv' " rqu" f g" o c { qt' " f gucttqmq" s wgf" eqphki wtdcp" uwu" o c { qt' gu" egpvtqu" f g" xgpvcu' 0 vej qu' f g' guvqu' f gur rkgi wgu' guvwxkgtq' p' lo r wncf qu' r qt' t' g' ut' keekqpgu' eqo gtekcngu' f g' hqu' r c' f ugu"

o^a zko q' f g' 37" c^o qu. " s wgf" nwg' q' hmg" ceqtvf q" c" 32" c^o qu' 0' Eqphqto g" c" gung" v' c' v' f q. " Vq{ qvc" etg»" wp" ukungo c' f g' r tqf week»p" f g' cwqr ct vgu' gp' ecf c' v' p' q' f g' guvqu' r c' f ugu' f g' hqto c' v' cn' s wgf' lej qu' r tqf wevqu' r wgf cp' ugt' cdcungekf qu' cn' t' guvq" f g' rqu' r c' f ugu' f g' rnc" tgi k»p0' Rqt" glgo r nq. " o qvqtgu' f k' g' ugn' gp" Vckr' p' f k. " o qvqtgu' c" i cuq' r' p' c" gp" k' p' q' p' g' ulc. " ukungo cu' f g' f ktgeek»p" gp" O crukc. " { " ukungo cu' f g' v' t' cp' uo k»p" gp" Hkr kpcu' 0' Ukp" go d' cti q. " r u' cwqr ct vgu' f g' o c { qt' " p' k' gn' v' g' epqni leq' uki wgtq' r tqf wek' p' f qug' gp' Lcr »p" { " f k' ut' kd' w' 2 p' f qug' c' rqu' r c' f ugu' f g' CUGCP " *Kqj' g' v' cn' 423: < 74/75+0"

³⁶⁵ Guvqu' b g' ecpkuo qu' hmg' t' q' r' gur c' f' cf qu' t' q' t' gn' c' ewgtf q' f g' k' p' v' t' e' co d' k' q' eqo r ngo gpv' t' k' f' g' c' wqr ct vgu' gp' v' t' g' t' c' f ugu' f g' CUGCP " gp' gn' ewcn' ug" guxcdnge' f' rnc' h' d' gt' v' f' f' g' g' z' r' q' t' v' c' e' k»p" { " rnc' t' g' d' c' l' c' f' g' c' t' c' p' e' g' r' u' r' c' t' c' r u' cwqr ct vgu' g' r' g' i' k' f' cu' r' q' t' hqu' i' q' d' l' g' t' p' qu' { " h' d' t' k' e' c' f' cu' r' q' t' r u' v' g' t' o' k' p' c' n' u' gp' gn' t' g' c' f' g' CUGCP 0'

³⁶⁶ Gp' 3; ; 3" f lej q' egpvtq' hmg' t' g' m' e' c' r' k' cf q' gp" O lej ki cp" { " ug' eqp' ut' w { »" wp' p' w' x' q' egpvtq' f g' r' t' q' v' k' r' qu' f g' " xgj 'fwmqu' { " v' g' v' q' 0'

³⁶⁷ Rqt" glgo r nq. " Vq{ qvc" Ecp' c' f' hmg' r' k' p' g' t' c' gp' gn' f' gucttqmq' f g' v' g' e' p' q' m' i' f' u' f' g' v' g' o' r' g' t' c' w' t' c' u' h' f' u' r' c' t' c' hqu' r' tqeguqu' f g' g' p' e' g' p' f' k' f' q' f' g' o' q' v' t' g' u' 0'

egpvtcrgu's wg'ug'xg'cp'co gpc| cf qu'r qt'rc'eqo r gvkxkf cf 'f g'rc'lpf wutk' lcr ppguc' { "gn'f 2 Hekv' eqo gtekn'eqp'f kej q'r c'ju0"

3.5 - Etapa de globalización (1990-2008)

" C" r ctvt' f gn' Cewgtf q" Rrc| c" f g' 3; ; 7." tgerk| cf q" gptg" rcu" r tkpekrcgu" r qvpeku" geqp»o lecu'eqp"gzegr ek»p'f g'rc'WTUU."ug'f gekf k»rc'f gr tgekeke»p'f gn'f »rc't'guwcf qwpkf gpug'gp" tgrceke»p'eqp'gn't guv'f g'rcu'f kxkcu0F g'gung'o qf q."rc'vcuc'f g'eco dkq'f g' { "gn'r qt'f »rc't'r cu»'f g' 0462'r qt'w&u3" c"0882'r qt'w&u30Guw'ngx»" c"rc'r 2 tf kf c'f g'eqo r gvkxkf cf 'lpvgtpekeqpcn'f g'rcu' gZR qtvekpqgu'lcr ppguc."eqo q'rcu'cwqo qvkegu."rcu'ewrcgu'ec { gtqp"7.5" "gp"3; ; 8"*Vq { qvc." 4234-0Rqt'gmj."Vq { qvc'ngx»" c'ecdq'wpc'r qn'flec'f g'hwgtvgtgf weekppgu'f g'eququ'cn'lpvgtkqt'f g' rc'hko c."ceqtvcpf q'vgo r qu'r tqf wevxxqu."f ki kcrk| cpf q'r tqeguqu' { 'tqdqvk| cpf q'r ctvg'f gn'vcclq" o cpwcn'gpvtg'qtvcu'lpvgtxgpekpqgu068"C'uw'xgl ."ug'tgerk| »"wpc'tgati cpk| cek»p'f g'rc'gutwewtc" lpvgtpc'f g'rc'go r tguc'lpvgtvcpf q'cej cvct'rc'hqto c'r kco kf cn'f g'o cpgtc'f g'ceqtvt'mu'ecpvcrgu' f g'o cpf q069"

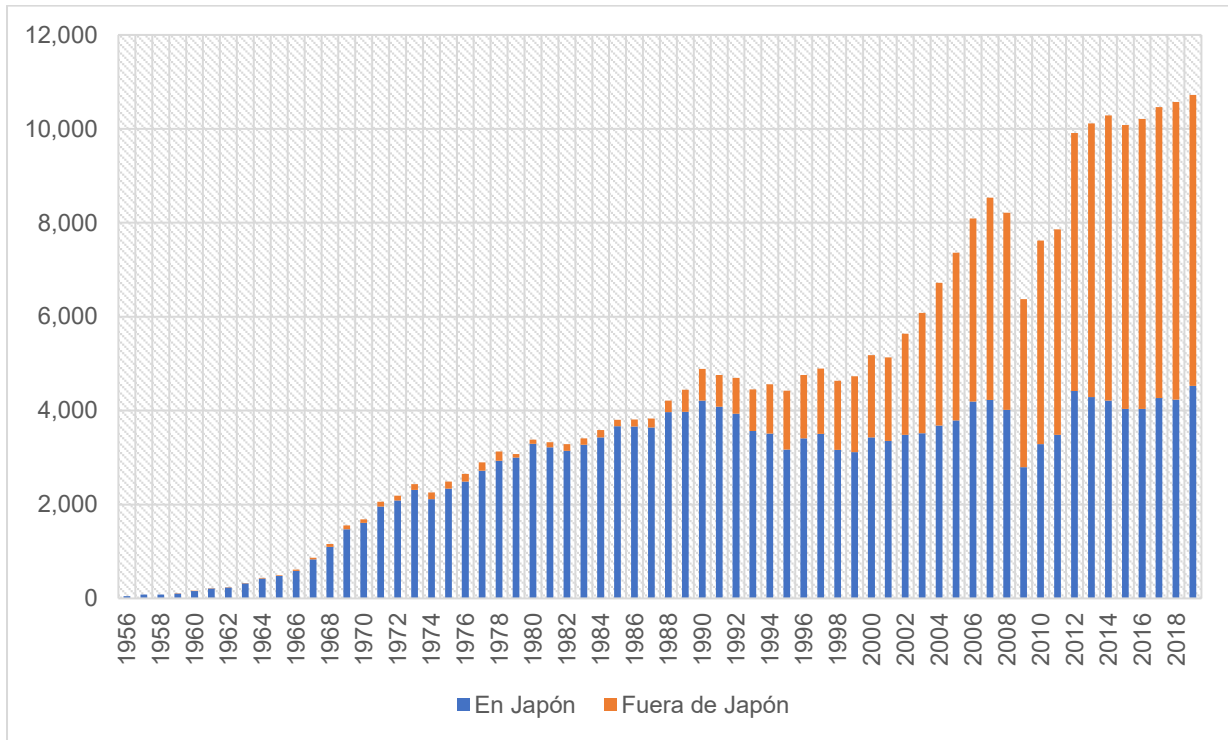
Rqt'qvtq'rcf q."gn'guwcnkf q'f g'rc'dwt dwlc'geqp»o lec'gp'Lcr »p'gp"3; ; 3.'s wg'lo r rke»'ec'f cu' gp'gn'r tqf wev'lpvgtpq' { "gn'eqpuwo q'gp'gn'r c'ju' { ".lwpv'eqp'rc'o' gpekpqpc'c'cr tgekeke»p'f gn' { gp." ko r cevtqp'gp'rc'hko c' { "uw'r tgugpek"gp'gn'r c'ju'*xgt' I t'a hkeq"003-0Gp'gung'eqpvzq."Vq { qvc" f gekf k»"wpc'r qn'flec'f g' gZr cpuk»p" c"pwgqu" pgi qekqu'0 Gpvtg"mu"o kuo qu"ug" gpeqvtcdcp<' cwqo cvk| cek»p." dkq'gepqm| 'c." ugtxkekqu" hpcpekgtqu." vgf'hapqu" r ctc" cwqo »xkrgu" { " ugo keqpf wevtgu0C'r ctvt'f g'gmj."etg»"53"go r tgucu'f guvkpcf cu'c"gzr m'vt'guvqu'pwgqu'plej qu" *Vq { qvc."4234-0C'uw'xgl ."rc'hko c'lcr ppguc"vqo »"wp'tqn'o a u'r tqvc| »pleq'gp'rc'eqpf week»p" geqp»o lec'f g'Lcr »p."eqp'lpvgtpeke»p'f g'eqmcdqtct'gp'rc'tgewr gtceke»p."r qt'm'vcpvq."ug'lpvgtmet»" o a u'gp'rcu'cuqekcekppgu'go r tguctku'lcr ppguc' { "gp'rcu'cuwpvqu'i wdgtpco gpvcrgu06:"

368"Up'go dcti q."mu'vcclq'ctgu'f g'Vq { qvc'o ctectqp'f'p kgu'c'rc'gutvcgi kc'eqp'wpc'f g'tgf week»p'f g'eququ'f g'rc' eqo r c' { "hko c'tqp'wpc'pwgxc'ugt'f g'cewgtf qu'gp'rcu'ewrcgu'ug'f gd'f' tgi wct'o a u'gutwewtc' gpvg'gn'vgtgdv'vcclq" svg"tgerk| cdc0F g'gung'o qf q."rcu'j qtcu'vcclq'cu'cpwcn' gpvg'gp"Vq { qvc'Lcr »p"ec { gtqp" { "rc'gutvcgi kc'f g' tgf week»p'f g'eququ'pq'r wf q'ugi wkt'dcu' pf qug'gp'uw'go r rrcf qu'0Dq { gt { "Ht { uugpgv"4224+.

369"Rqt'qvtq'rcf q."c'o gf kcf qu'f g'3; ; 2"Vq { qvc'rcp| »"uw'f'p'c'f g'r tqf wevqu'f g'nwq'eqp'gn'o qf gmj'Ngzwu'r ctc" eqo r gvt'eqp'rcu'o ctecu'0 gtegf gu'Dgpl ."DO Y'cpf 'Lci wct'0

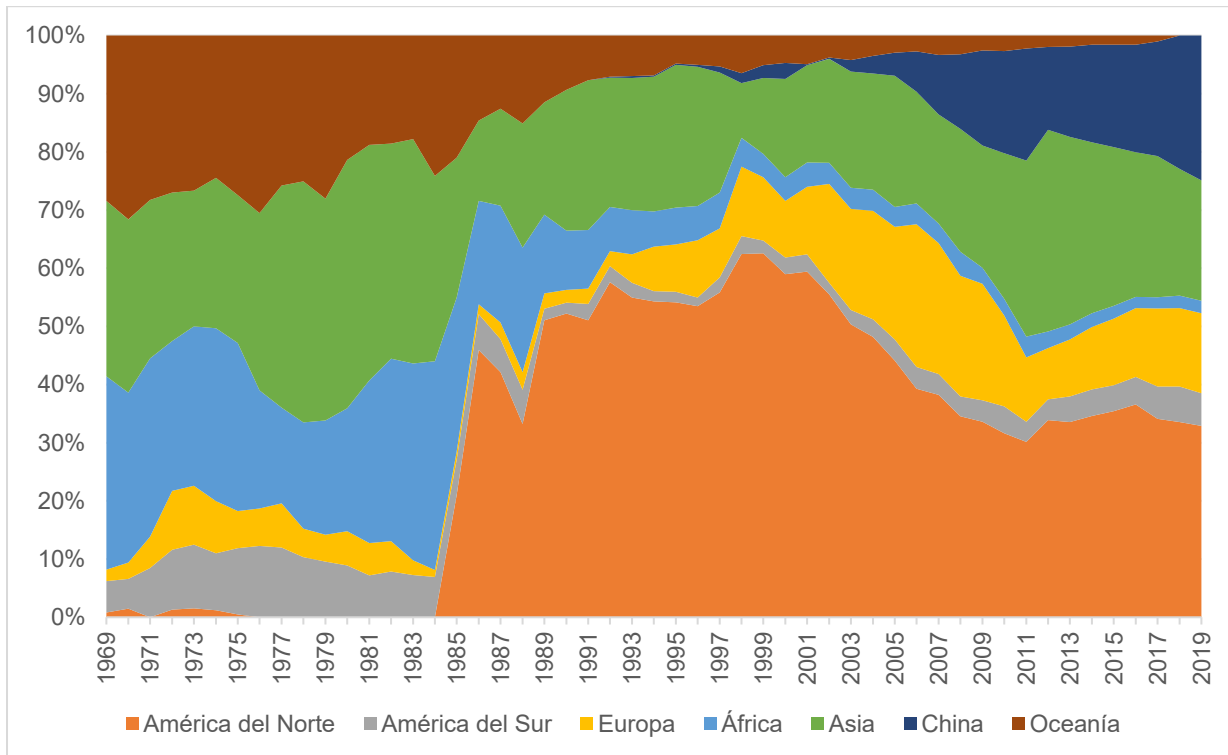
36:"Cu'f'gp"3; ; 6'gn'r tgu'f gpvg'f g'rc'lwpvc'f k'gevkx."Gdk'Vq { qf c."hw'f guki pcf q'xlegr tgu'f gpvg'f g'rc'Hgf gtceke»p'f g' Cuqekcekppgu'f g'Go r rrcf qtgu'f g'Lcr »p"*P kmgkt gp."nwi q'Mgf cptgp-0Gp"3; ; 4"gn'xlegr tgu'f gpvg'glgewkxq'f g' VO E."Vcwwtq'Vq { qf c."hw'p'qo dtcf q'r tgu'f gpvg'f g'rc'Cuqekcek»p'f g'Glgewkxqu'Eqr qtcvxxqu'f g'Lcr »p0Nwi q." gp"3; ; 6'gn'r tgu'f gpvg'f g'rc'lwpvc'f k'gevkx'f g'Vq { qvc."Uj qlej ktq'Vq { qf c."hw'p'qo dtcf q'r tgu'f gpvg'f g'rc'Mgf cptgp." ukp'f q'gn'r tko gt'go r tguctkq'f gn'ugevqt'cwqo qvkt| gp'f k ki k'rc'cuqekcek»p'go r tguctk0F wcpvg'uw'i guk»p'lpvgt'»" gp'gn'i qdkgtpq'lcr qp2'u'r ctc"s wg'tgf w'ecp'rc'ecti c'ko r qukxkc'gp'rcu'go r tgucu'f g'hqto c'rcn'f g'o cpvpgt'p'k'rgu" uko kctgu'c'hu'f g'GGWW'f' qf gt'luvgpgt'rc'eqo r gvkxkf cf 'lpvgtpekeqpcn'0Gp"3; ; ; "gn'r tgu'f gpvg'f g'Vq { qvc'J ktqj k' Qmwf c'cuwo k»'cn'htgpvg'f g'rc'cuqekcek»p'P kmgkt gp." { "gp"4224"s wgf »"cn'htgpvg'f g'rc'lpvgt'ceke»p'f g'co dcu' cuqekcekppgu'go r guctku'2P kmgkt gp" { "Mgf cptgp."dclq'gn'p'qo dtg'f g'rc'ugi wpc'0Dclq'uw'i guk»p'f guctq'm»uwu' kf gcu'dclq'gn'r rcp'0Xkuk»p'Qmwf c'o"*Vq { qvc."4234-0"

Gráfico III-1 - Producción anual de vehículos de Toyota en Japón y en el exterior (miles de unidades) (1956-2019)



Hwpgv<grdqtcck>p'r tqr kc'gp'dcug'c'Htg{uugpgv%4232+.'Vq{qvc'%4234+'{ 'Vq{qvc'I mdcif)

Gráfico III-2 - Producción de vehículos fuera de Japón por región (porcentajes) (1969-2019)



Hwpgv<grdqtcck>p'r tqr kc'gp'dcug'c'Htg{uugpgv%4232+.'Vq{qvc'%4234+'{ 'Vq{qvc'I mdcif)

Cf go ^a u. "c'r ctvkt "f g"rc"ecff c" f g"rc" WUU. "ug'r tqhwf k » "rc" kpvgtpcckqpcrk cckp" f g"rc" hto c0' Guc" eqo gp| » "c" r rpklect" rc" co r rckekp" f g" uwu" qr gtcekqpgu" gp" pwxqu" o gtecf qu" go gti gpvgu. 'r tkpek cm gpv"gp" Cuk. 'r gtq' wco d k p" gp" Co ² tlec" Ncvkpc0' F g' guc' hto c. 'f wcpv" muf tko gtqu' c° qu' f g'3; ; 2' ug' eqo gp| » 'c' f g' rkp gct' h' hgi cf c' c' Cti gpvkpc" { 'rcu' pwxcu' kpxgtukqpgu" gp' Dtcuk' eqo q' r ctvg' f g' uw' g' zr cpukp" gp' Uw' co ² tlec. 's w' ug' c' pcrk ct^a p' eqp' b c { qt' f g' vpk k p' vq" gp' gnr t » zko q' ecr "fwq0"

Cuko luo q. "gug" f gucttqm" o wpf kcn' cegrnt » gnr' tgn' f g' rc" go r t guc" eqo q' lwi cf qtc" i mdcr0' Cnrtgur gevq. "gp"3; ; 3' Gkk' Vq { qf c. "uqdtkpq" f g' nhw' cf qt' Ucnkej k' Vq { qf c" { 'r t gulf gpv' f g' rc" lwpv" f k' gevxc" f g' VO E. "uquv" p' c < "para avanzar como una corporación global, debemos expresar claramente una filosofía corporativa global. Debemos dejar por escrito el entendimiento común que hemos desarrollado y repensar nuestras estructuras comerciales y organizacionales en términos de esa filosofía corporativa global". Gp" gug" o cteq. "gp"3; ; 7" cuwo g' eqo q' r t gulf gpv' f g' VO E' r qt' r tko gtc" xgl "wp" glgewkxq" s w' pq' r gt vpgp' c' c' rc" hco krc" Vq { qf c. 'J' ktquj k' Qmw' c. 's w' k' r' gto cpgek » gp' gnr' wguv' j' cuw' 3; ; ; . 'ewcpf q' gu' t ggo r rc| cf q' r qt" Hwlk' E' j' q. "gn' ugi wpf q" go r t guctk' g' z vgt p' q' c' rc" hco krc" gp' mgi ct' cn' hwi ct' f g' r t gulf gpv' 0⁶: "F g" gug" o qf q. "rc" eqo r c° p' c' eco dk » uw' r qukek » eqp' t gur gevq' c' rcu' f² ecf cu' r t g' xku. "gp' rcu' ewcrgu" pq' s wgt' c' ugt' xkuc' eqo q' wpc' hto c' ci t g' xkc. 'ukp' q' o ^a u' d' k' p' eqpugt' xcf qtc" *Uj ko k' w' 422; <: 5-0"

" Qvtq' r wvq' f g' ceek » p' hwg' gnr' f gucttqm" f g' mqu' t g' wtuqu" j' wo cpqu" { c' s w' gn' p' Aō gtq' f g' go r ngcf qu' f g' Vq { qvc" gp' vq' q' gn' o wpf q' et gek » gp' i' tcp' o' gf k' c' c' r' tkpek kqu' f g' uki m. 'r cucpf q' f g' 422022" gp'3; ; ; "c' 522022" gp' 4229" *Vq { qvc. "4234+0C u" gp' 4224" ug' etg » gn' k' p' ukwq' Vq { qvc" r ctc" f ct" uqr qt' v' c' rc" i' mdcrk' cckp" f g' mqu" go r ngcf qu' f g' rc" eqo r c° p' c' 0' Cf go ^a u. "ug" etg » gn' o gpekqpcf q' f qewo gpvq' Toyota Way" { "ug' tgr ct' k » c' vq' cu' rcu' h' k' rgu' f g' rc" go r t guc" gp' gn' o wpf q' eqp' gn' h' p' f g' k' p' w' rct' rc" xkuk » p' go r t guctk' cn' f g' rc" hto c0' C' uw' xgl . "gn' Toyota Way" tgo cte » rc" eqp' v' p' w' k' cf " f g' rc" t g' rck » p' eqqr gt' v' x' c' f g' r' cti q' r rc| q' s w' Vq { qvc" r rcpv » ukgo r t g' eqp' uwu" r t' x' g' g' f' qt' gu³⁷² *Kqj "gv' cn' 0' 423; d+0"

³⁶: "C" uw' xgl . "Vq { qvc" rcp| » "gp' gn' 4222" uw' r qn' f' k' c' f g' Eqput week » p' f g' Equvqu" Eqo r g' v' k' x' qu' r ctc" gn' uki m "ZZ K *EEE43+0C u" ug' f g' h' p' k' gnr' rcp" 0' C' dtk' Rcuq' c' Vq { qvc" *Break Through Toyota" s w' eqpuk' p' c' + eqput w' k' "wp" ukngo c' r ctc' etgct' r' t' qf' wvqu' c' v' t' c' v' x' qu' = d + t' ghqto ct' gnr' t' q' eguq' f' g' v' qo c' f' g' f' gek' k' p' p' gu' uqdt' g' r' t' qf' wvqu. 'e' + h' q' t' w' r' e' g' t' "rc" eqo r g' v' k' x' k' cf " f g' rc" r' t' qf' week » p' k' p' v' g' t' p' c' = { 'f' + t' ghqto c' f' g' mqu' equvqu' h' k' qu' 0' C' uw' xgl . 'eqo q' r' ct' v' g' f' g' gug' r' t' q' { gevq' ug' r' t' q' wuq' wpc" o c { qt' f' k' k' rck' cckp" f g' mqu' r' t' q' eguq' f' g' v' t' c' d' c' l' q' cn' k' p' v' g' t' k' t' f' g' rc" hto c0' Rqt' q' t' q' r' c' f' q. "gp"3; ; 9" Vq { qvc" rcp| » uw' o' qf' g' m' j' f' dtk' q. "Rt' ku. 'eqp' x' k' v' k' p' f' qu' g' p' w' p' i' f' g' t' i' mdcrn' f' mqu' x' g' j' p' w' mqu' co' ki' c' d' r' gu' eqp' gn' o' gf' k' q' co' d' k' p' v' g' *Uj ko k' w' 422; d+0"

³⁷²: "F g" gug" o qf q. "r qt' g' l' go r m. "r w' g' f' g' x' g' t' u' g' e » o q' mqu' r t' x' g' g' f' qt' gu' f' g' GGWW" tgo ctecp" rc" t' g' rck » p' eqp' Vq { qvc" eqo q' rc" o' g' l' q' t' "gp' v' g' v' q' f' cu' rcu" v' gto k' p' c' r' gu' c' w' qo q' v' t' legu' k' p' u' c' r' c' f' cu' gp' f' lej' q' r' c' f' u' *x' g' t' i' t' h' eq" 2/9" f' gn' C' p' g' z' q' G' u' c' f' f' u' r' e' q' -0' G' u' c' r' qn' f' k' c' f' g' eqqr gt' cck » p' eqp' r t' x' g' g' f' qt' gu' ug' r' tqhw' f' k' » "gp' 4234" ewcpf q' f' g' u' f' g' rc" ecuc" o' c' v' t' k' " Vq { qvc" etg » gn' f' g' r' ct' w' o' gpvq' 0' n' q' e' c' k' cckp" f' g' x' g' j' p' w' mqu" { 'r' ct' v' g' o. "gn' ewc' r' d' t' gi' c' d' c' r' qt' gn' o' c { qt' eqp' v' p' k' f' q' n' e' c' n' f' g' h' u' x' g' j' p' w' mqu' f' g' Vq { qvc" gp' h' u' r' c' f' u' g' u' f' q' p' f' g' u' v' p' t' c' f' k' e' c' f' cu' uwu' l' w' d' u' k' f' k' t' k' u' q' v' t' i' c' p' f' q' c' u' k' u' g' p' e' k' c' f' o' k' p' u' t' c' v' x' c' { 'v' e' p' k' e' c' rcu' c' w' q' r' ct' v' k' u' c' u' f' g' e' c' f' c' r' c' f' u' *Kqj "gv' cn' 0' 423; +0"

F g'guv'hqto c.'ði mđcñ'ug'eqpxk'gp'hc'r cñdte'ernxg'gp'rcu'qr gtcekppgu'eqo gtekrngu' f g'VO E" c"r t'kpek'kqu'f gn'uki m'ZZK{ "ug'wkk' »"gp"o wej qu"pqo dtgu'f g'uwu'qti cpl' cekppgu' *Vq{ qvc."4234+0C"uw'xgl . 'ug'mgx»"c'ecdq'wpc'hmgtvg'tggutwewtcek»p" f g'rc'eÀr wr'f kti gpekcn" tgf wekgpf q" c"rc"o kcf "gn'p'Ào gtq" f g'f k'gevtgu" { "r tqo qekqpcpf q" c" f qu'glgewkxqu" f g'Vq{ qvc" GGWW" { "wpq" f g'Vq{ qvc" I tcp" Dtgv° c" eqo q" f k'gevtgu" f g'Vq{ qvc" O qvt "Eqtr qtcvkqp." ukgpf q" nqu" r tko gtqu" glgewkxqu" pq" lcr qpgugu" gp" rc" r qukek»p" f g'f k'geek»p" { "o ctecpf q" gn'two dq" f g" i mđcñ' cek»p" f g" nqu" tgevtuqu" j wo cpqu" f g" rc" hto c0' Cf go a u." rc" go r tguv" eqo gp| »" c" f guegpvcñ' ct" uwu'f gekukppgu' etgcpf q" uwu'ugf gu' tgi kqpcrgu" gp" GGWW" { "Gwtqr c." uwu' o gtecf qu" r t'kpek' cñgu" gp" gug' o qo gpvq" *Uj ko k' w."422; d+0

" Cf lekqpcñm gpvg. "gp"3; ; ; "Vq{ qvc'hmg'hkucf c"gp'rc"dqnc" f g'xcmqtgu' f g'P wxc" [qtm' { "f g" Nqpf tgu" eqp" gn' qdlgkxq" f g' r qukekqpc" uw' o ctec" c" pkxgn' o wpf kcn" *Vq{ qvc."4234+0C" uw' xgl . " go r gl »" c" ko r ngo gpvt" rc" r qñ'lec" f g' tgf kmtkdwek»p" f g' f k'kf gpf qu" gpvtg" uwu' ceekqpkuc" { "ug" etg»" gn'r tqi tco c" f g' Cf o k'pukteck»p" f g' rcu' I cpcpeku' I mđcñgu' eqp" r rpgu' f g' kpetgo gpvqu" gp" rcu' i cpcpeku' f g' rc" go r tguv" { "rc" f kmtkdwek»p" f g' f k'kf gpf qu" C" r ct' vt" f g' guq. "rc" eqo r c° ¶" eqo gp| »" c" cwo gpvt" uwu' ceekqpkuc" kpf k'kf wcrqu" s wg" gp"4242" mgi ctqp" cñ'34' " f gn'vqcn' s wg" eqv'k cdc" gp" rc" dqnc. "gn'ewcn' gtc" gn'96' " f gn'r cs wvg" ceekqpcñkq" f g' rc" eqo r c° ¶" 73" Ukp" go dci q. " c" r guct" f g' guvqu' eco dkqu. "gmq" pq" uki pkhe»" wp" eco dkq" gp" rc" cf o k'pukteck»p" f g' rc" go r tguv" gp" hwpek»p" f g' rc" xcmqt' k' cek»p" f g' Vq{ qvc" gp" gn' o gtecf q. " gu" f gek. " pq" j wdq" wpc" cf qr ek»p" f g' gutvcgi kcu" f g' i cpcpeku' t' a r k' cu" c" eqt vq" r rc| q. " ukpq" s wg" uki wk»" r tko cpf q" wpc" o k'cf c" gp" gn' etgelo kgpvq" c" rcti q" r rc| q" *O ci gg."4229+0

Gp"4242" gn'r t'kpek' cñ' ceekqpkuc" f g' rc" hto c" gtc" gn' Ewuvf { "Dcpñ'qh' Lcr cp" *33' + "dcpeq" lcr qp² u' eqp" ugf g" gp" Vqm' { q' s wg' r tqeguc" f k'wpvqu' vkr qu' f g' hqpf qu' f g' kpxgtuk»p" 0Guv. "c" uw' xgl . " gu' eqpvt qm' f q' r qt' wp' i twr q' f g' eqo r c° ¶" cu' h' k'p' c' p' e' k' t' cu' lcr qpgucu" 0Gp" ugi wpf q' hwi ct. "ug" gpewgpvc" Vq{ qvc" k'pf wut' ku' Eqtr qtcvkqp" *9' + "go r tguv" f gn' l twr q' Vq{ qvc" s wg' qtki k'pcñm gpvg' hmg' rc" hto c" f g' vgrtgu' b geª plequ' f g' rc" hco k'kc" Vq{ qf c" { "rc" ewcn' gu' r qug' ¶" c. "c" uw' xgl . " r qt" VO E" gp" wp"45.7' 0' Nwgi q. " qvtq" ceekqpkuc" o c { qtkctkq" gu" Vj g" O cuvt "Vtwuv" Dcpñ'qh' Lcr cp" *9' + "dcpeq" h'kf wekctkq" lcr qp² u" f g' f k'cf q" gzenwukxco gpvg" c" rc" cf o k'pukteck»p" f g' ecr kcrqu" { " eqpvt qm' f q" o c { qtkctkco gpvg" r qt" O kuwdkuj k" WHL" Vtwuv" cpf " Dcpñ'ki " Eqtr qtcvkqp" *68' + { "P k r qp" Nkg" k'puwtepeg" *55' +0' Cñ' ci twr ct" c" nqu" ceekqpkuc" o c { qtkctkqu" f g' cewgtf q" eqp" uw' cev' k'kf cf . " r tqr kgf cf { " r c' ¶" f g' tcf kecek»p" ug' r wgf g' cf xgt vt' s wg' wp"48' " f gn'r cs wvg" ceekqpcñkq" gu' r qug' ¶" q" r qt" wp" i twr q' f g' go r tguv" h' k' p' c' p' e' k' t' cu" { " hqpf qu' f g' k' p' x' g' t' u' k' » p" lcr qpgugu" 0Gp" guvg" eqplwpvq" ug"

³⁷³ "Gñ'38' " t'guv' cpv' uqp' ceekqpgu' f g' cwqectvgtc" *shares of treasury stock+ f g' VO E0C" uw' xgl . "gp"4228" eqo r t»" r ct' vkr cek»p" ceekqpcñk" gp" rcu' hto cu' lcr qpgucu' cwqo q' t' legu' HwkJ gcx { "k'pf wut' { " *Uwdctw' eqp" wp": .9' "g" Kw' w" O qvt" eqp"70' " *Uj ko k' w."422; <: 8+0

f guvecep'f qu'cevqtgu'lo r qt wvpgu'f gn' c'ju. 'hqu'i twr qu'go r tguclku'zaibatsu'O kuwduj k'f 'O kuwk' Nwgi q.'ug'j cmc'wp'32' "r qt'hto cu's wg'uqp'r ctvg'f gn'I twr q"Vq{ qvc"{"qvtq"9' "r qt'ecr kcrqu' hpcpekgtqu.'r gtq'eqp'ugf g'gp"GGWW"*xgt'I t^a hleq"KK5. "Vcdm"KK6"{"Vcdm"2/8" f gn' Cpgezq" Guxcf "jukeq+0"

Nc'r ctvkr cekp'ceekpctk'f g'rc' hco kkc"Vq{ qf c"gp'rc'eqo r c° "c'gu'lpuki p'kecpvg0Rqt" glgo r m.'rcu'ceekpgu'f gn'r tguclku'f g"VO E'f guf g'422; ."Cnkq"Vq{ qf c."plgv'f gn'hwf cf qt" Mkej ktq"Vq{ qf c"{"d'upkv'f g'Ucnkj k'Vq{ qf c."gu'f g'o gpqu'f gn'2.3' 0Uk'go d'cti q.'c'r gucl'f g' gmj.'rc' hco kkc'wxq'ukgo r tg'wp'eqpvtq'ncuk'vq'cnf gn'i twr q"*O ci gg."4229=Rctf k'423; +0Ugi Àp" Dgppgf ugp'gv'cn0*4243<6+guv'hwg'r quklrg'i tceku'c'rc'r t'gugpek'f g'rc' hco kkc'gp'gn'eqpugl'f g' cf o'lpkutcekp'tgur cnf cf c'r qt'r ctvkr cekp'gu'etw' cf cu'f g'pvtq'f gn'i twr q'f g'go r t'gucu'Vq{ qvc" {"rc'hpqtr qtcekp'f g'EGQu'r tq'gukp'cngu'f g'ectt'g'c'f w'cpv'g'r gt'q'f qu'gp'hu's wg'hu'j' gt'gf'gtqu' hco k'kt'gu'p'q'guv'cdp'hu'qu'r ctc'vqo ct'gn'vko »p0⁷⁴"

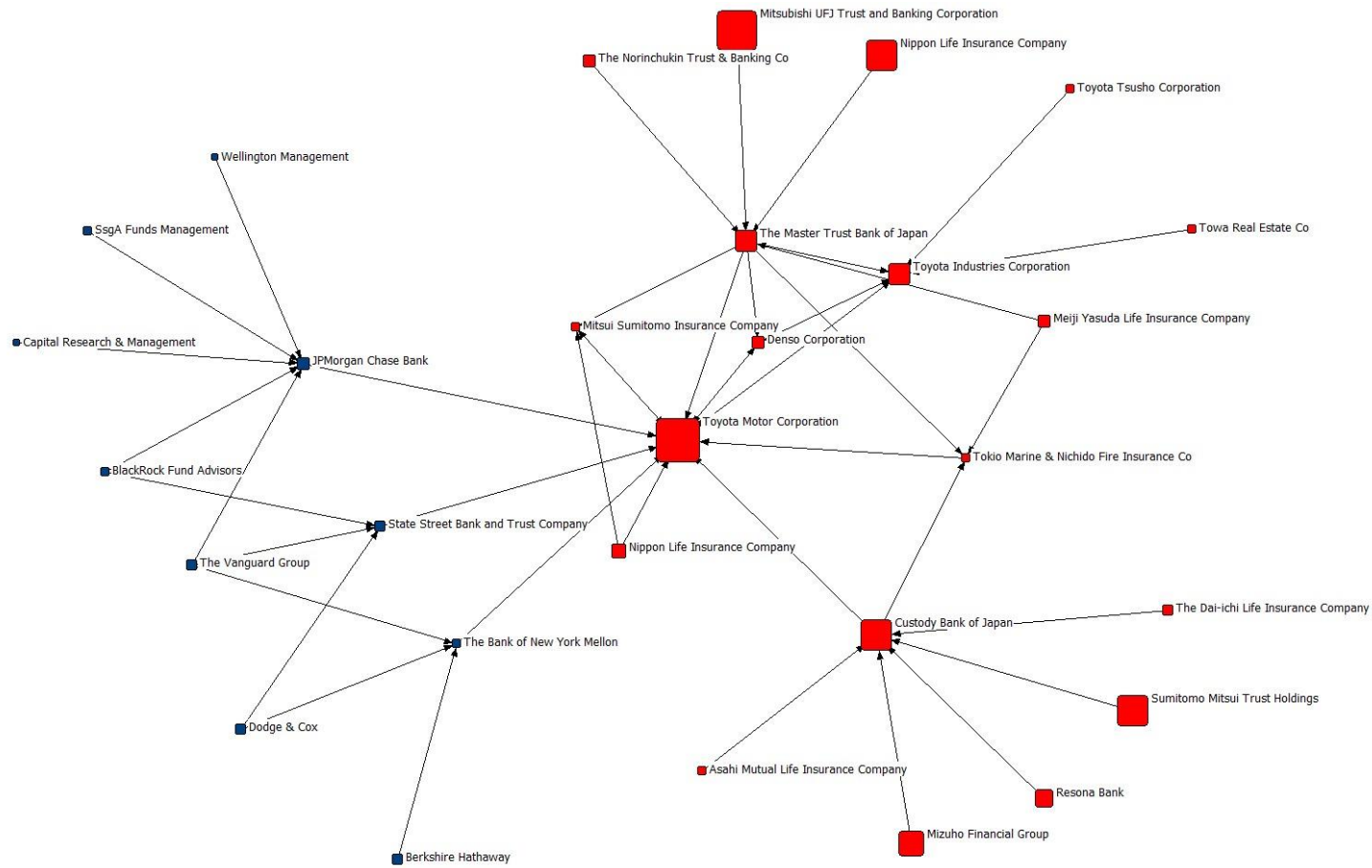
Tabla III-4 - Principales accionistas de Toyota Motor Corporation (2020)

Nombre	Acciones	Porcentaje sobre el total
Custody Bank of Japan	366.017.000	11%
Toyota Industries Corporation	238.466.000	7%
The Master Trust Bank of Japan	220.666.000	7%
Nippon Life Insurance Company	127.340.000	4%
JPMorgan Chase Bank	107.277.000	3%
Denso Corporation	89.915.000	3%
State Street Bank and Trust Company	69.985.000	2%
Mitsui Sumitomo Insurance Company	56.814.000	2%
The Bank of New York Mellon	54.467.000	2%
Tokio Marine & Nichido Fire Insurance Co	51.064.000	2%

Hwpgv'g'g'ndq'ctcekp'r tqr k'gp'dcug'c'Vq{ qvc'I m'dcn0'

³⁷⁴Gr'eqpvtq'nhco k'kt' 'uk'r ctvkr cekp'ceekpctk'p'q'gu'wpc'tctgl c'gp'rc' »p.'qvtqu'ecuqu'uko k'kt'gu'hu'eqo r t'gpf'gp' Uw' wnk'O qvt'Eqtr qtcv'kp'{"Ecuk'Eqo r wgt'Eqo r cp' {"Dgppgf ugp'gv'cn0"4243+0'

Gráfico III-3 - Red de accionistas mayoritarios de Toyota Motor Corporation (2020)*



Hwgpv-gmrdqtcelp'r tqr k"gp"dcug"clphqto celp"fg'ecf c"go r t guc" { "ukku'f g'eqk celp"fg'o gtecf q<O ctngv'Uetggpgt. 'T gwgtu" { 'O qpg { 'EP P 0" , "Gn'f kci tco c"gu"gmrdqtcf q"eqp"gn'uqhy ctg"WEKP GVONc"nhej c"gpvtg"nqu'pqf qu'cr wpc'f guf g'nqu'r tqr lgvtkqu'c"ru'eqo r c° 'cu'r qugf cu'Gn'vco c° q'f g'nqu'pqf qu'kpf kec"r" r ct vkr celp"gp't gmkelp"eqp"gn'pqf q'eqp"gn's wg'ug't gmkelpc0Gn'f twr q'f g"ceekpkxcu'f kt gevuf g'VO E'r quggp'wpc"guerc"o c { qt'gp'gn'vco c° q'f g'nqu'pqf qu'Nqu'eqmgt gu'kpf kec"p" pcekpcitf cf "f g'nqu'ceekpkxcu'ukpfp q'tqlqu'iqu's wg'vkgp'uw'ecuc"o cxtk "gp"lcr »p" { "c| w'iqu's wg"r"vkgp'gp"GGW0Rct c"co r rct"r"lphqto celp"eqpwnct"r" P qc" O gvqf qm>i kec'6" { "iqu'Vcdm"2/8'f grlCpgzq'Gucf ¶lkeq0"

Gp'tguwo gp.'f wtcpvg'ru'Ànko cu'f²ecf cu'f gn'uki nq'ZZ'Vq{ qvc'vgtto kp»'f g'g'zr cpf ktug'c' p'k'gn'kp'vgt'p'cek'q'pcn'c'r ct'v'k'f'gn'g'uc'peco k'gp'v'q'gp'gn'o g'ecf q'ler qp²u.'n'cr gt'w'c'f'g'p'w'g'x'cu' r'nc'p'cu'gp'f'k'w'p'qu'r'c'f'ug'g'{'gn'ce'gn'g'c'f'q'c'wo'gp'v'q'f'g'nc'r'rt'q'f'week'p'hw'g'tc'f'g'Lcr »p'0'Gu'g'gu'gn' o'cte'q'f'g'g'zr'cp'uk'p's'wg'o'ctect'^a'n'cr'gt'w'c'f'g'nc'r'nc'p'w'c'f'g'Vq{qvc'gp'Cti'gp'v'k'p'c'{"ug' r't'q'hw'p'f'k'ct'^a'gp'gn'r't'z'k'o'q'ecr'f'w'w'q'0'c'f'go'^au.'gp'hw'r't'k'o'gt'qu'c'o'qu'f'gn'p'w'g'x'q'uki'nq'eqo'gp| »'c' g'w'c'd'ng'e'g't'ug'eqo'q'w'p'c'l'wi'cf'q'tc'i'nd'cn'le'q'p'p'w'g'x'qu'f'g'uch'f'q'u.'v'c'rgu'eqo'q'nc'ko'r'ng'o'gp'v'c'k'p'f'gn' VRU'{"gn'o'²v'q'f'q'Vq{qvc'gp'nc'u'hw'k'c'rgu.'nc'k'p'eq't'r'qt'cek'p'c'nc'f'k'g'ee'k'p'f'g'nc'ecuc'o'c'v'k'k'f'g' p'w'g'x'qu'g'lg'ew'k'x'qu.'pq'r'gt'v'p'g'el'gp'v'gu'c'nc'nc'ho'k'k'c'Vq{q'f'c'gp'gn'ecuc'f'g'nc'r't'g'uk'f'g'pek'{"pq' q't'k'w'p'f'qu'f'g'Lcr »p'gp'nc'f'k'g'ee'k'p.'{"nc'cr'gt'w'c'c'o'c'c'q't'r'ct'v'k'ek'cek'p'cek'q'p'ct'k'k'p'f'k'k'f'w'cn'gp' dcug'c'uw'k'p'en'w'k'p'gp'nc'u'r't'k'pek'c'rgu'r'nc'|cu'hw'p'c'pek'g't'cu'f'gn'o'w'p'f'q'0'F'g'v'q'f'cu'hw'to'cu.'g'w'c' t'g'g'w't'w'ew't'cek'p'ug'ng'x'»'c'ec'd'q'eq'p'w'p'hw'g't'v'g'eq'p't'q'n'f'g'uf'g'nc'ecuc'o'c'v'k'k'{"eq'p'w'p'c'hw'g't'v'g' k'p'hw'g'pek'f'g'nc'nc'ho'k'k'c'hw'p'f'c'f'q'tc'gp'nc'f'c'f'o'k'p'k'w't'cek'p'f'g'nc'go'r't'g'uc'0"

3.6 – El proyecto de Innovación Internacional de Vehículos Multipropósito (IMV)

Gp'gu'g'v'o'cte'q'f'g'o'c'q't'k'p'v'g'te'q'p'g'z'k'p'i'nd'cn'gp'4224'Vq{qvc'nc'p| »'w'p'p'w'g'x'q'r't'q'f'ge'v'q' o'w'p'f'k'cn's'w'g'ug'f'g'w'k'p'c'd'c'c'nc'f'k'k'k'p'k'p'v'g't'p'cek'q'pcn'f'g'r'nc'w'ch'q'to'cu'f'g'f'g'v'g'to'k'p'c'f'qu'x'g'j'f'ew'w'qu' x'g'p'f'k'f'qu'g'z'en'w'k'x'co'gp'v'g'gp'nc'u'g'o'g'ec'f'qu'hw'g'tc'f'g'g'Lcr »p.'nc'o'c'f'q'Rt'q'f'ge'v'q'f'g'k'p'p'q'x'cek'p' k'p'v'g't'p'cek'q'pcn'f'g'X'g'j'f'ew'w'qu'O'w'w'k't'q'r' »uk'q'*"Innovative"International Multi-Purpose Vehicle." IO X'40'N'qu'o'g'ec'f'qu'c'h'g'ew'f'qu'r'q't'gn'r't'q'f'ge'v'q'g't'c'p'362'r'c'f'ug'g'gp'f'q'p'f'g'g'w'qu'g'o'q'f'g'nc'u'g't'c'p' x'g'p'f'k'f'qu.'f'c'p'f'q'ew'g'p'v'c'f'g'nc'gp'x'g't'i'c'f'w't'c'f'gn'r'nc'p'x'g't'V'c'd'nc'k'k'k'7'40"

Nc'k'f'g'c'g'tc's'w'g'nc'r'rt'q'f'week'p'f'g'nc'u'x'g'j'f'ew'w'qu'ug'f'g'w'c's'w'g'r'q't'ug't'oh'c'd't'k'ec'f'qu'r'q't' Vq{qvc'o'c'p'v'gu's'w'g'oh'c'd't'k'ec'f'qu'gp'V'c'k'c'p'f'k'c'o'q'oh'c'd't'k'ec'f'qu'gp'Lcr »p'o.'gu'f'g'ek't.'t'g'h'q't|ct'nc' o'cte'c'Vq{qvc'r'q't'g'pek'o'c'f'g'nc'u'f'hw'g't'g'pek'cu'f'g'r't'q'f'week'p'p'cek'q'p'c'rgu'³⁷⁵'k'q'j'g'v'c'nc'0'423: d'40'c' uw'x'g'l.'gn'r'nc'p'cr'w'p'c'd'c'c' "aumentar fuertemente la competitividad optimizando el proceso mundial de desarrollo, abastecimiento y producción de vehículos a través del ordenado y eficiente enlace de los centros de producción ubicados fuera de Japón" "D'c'nc'p'eg'V'c'U'c' 39'9'4'225'40'R'q't'q't'q'nc'f'q.'gn'r't'q'f'ge'v'q'cr'w'p'w'»'c'd'cl'ct'nc'u'equ'qu'gp'nc'hw'c'd't'k'ec'ek'p'f'g'g'w'qu' x'g'j'f'ew'w'qu'{"uw'u'r'c't'v'gu'f'g'd'k'f'q'c's'w'g'ug'f'g'w'nc'ec'nc'k' »'nc'r'rt'q'f'week'p'f'g'g'w'qu'hw'g'tc'f'g'g'Lcr »p'gp' r'c'f'ug'g'eq'p'o'gp'q't'g'u'equ'qu'{"eq'p'V't'c'v'c'f'qu'f'g'N'k'd't'g'E'q'o'g't'ek'q'V'N'E'u'V'j'g'Y'c'm'U't'g'g'v'L'q'w't'p'c'n' 34'17'4'227'40"

³⁷⁵F'g'v'q'f'qu'o'q'f'qu'nc'u'p'w'g'x'q'u'x'g'j'f'ew'w'qu'IO X'g't'c'p'f'k'ug'o'c'f'qu'gp'Lcr »p'k'q'j'g'v'c'nc'0'423: 40"

Gug'r tq { geq "ci twr » "r" hdtkecel» p "f g" tgu" eco kqpgcu'r len'wr "J kwz+ "wpc" o kpkcp " *kppxc+ { "qvc" UWX "Hqt wpgt IUY 6+ "s wg" eqo r ctvcp "wpc" o kuo c "r rvc hqto c" eqo Ap. "m" s wg" r gto kfc "vco dk p" vpgt "ukugo cu" f g' r tqxkuk» p "f g" r ctvgu" { "eqo r qpgpvu" tgefr tgequ" gptg" guqu" r wpu0⁷⁶ "Gn' r rcp" ug" tgcik » "eqpeqo kcpvgo gpv" eqp" gn' rcp| co kpvq" f g' r "pwgxc" J kwz "9A" I gpgtcel» p. "gn' r tko gt" o qf gm "f g' r" eco kqpgv "s wg" f gl» "f g" ugt "hdtkecf q" gp "Lcr » p0 "Gn' dldgkxq" i gpgtci "f gn' r tqi tco c" gtc" uc' kuhcegt " r " f go cpf c" f gn' eqpuwo kf qt " f gn' uki m " ZZK' f g" cnc" f wcdkrf cf "f g" rqu' r tqf wexu" { "o c { qt "eqphqt v" *Vq { qvc. "471: 4226+0"

Gucu" dcugu" o cpwrewtgtcu" gucdcp" f gukpcf cu" c " r tqxgg " f g" xgj fawqu" c " i tcpf gu" tgi kqpgu" f gn' o wpf q "eqo q "Cuk. "Gwtqr c. "f hkec. "Qegcpfc. "Co 2 tlec "Ncvkpc" { "O gf kq" Qtkpv0 "Cti gpvkpc. "ew' c' r rcpv "f g' r tqf week» p" j cd' fc "ukf q "kpcwi wcf c" wpu' r qequ" c° qu" cpvgu. "gp" 3; ; 9. " hwg" wpc "f g" r cu" cf lwf kecf cu" gp " guv" r tq { geq "lwpv" eqp "Vckrpf kc. "kpf qpguk" { "Uw' a hkec " *xgt " Vcdre " 7+0 "Gn' tqn' r gpu' cf q' r etc "Cti gpvkpc "hwg" r " hdtkecel» p "f gn' o qf gm "UWX" UY 6" { "f g' r" r len'wr "J kwz. "gp' r "ewcn' gn' 97' " f g' r " r tqf week» p " gtc " f gukpcf c " c " r " gzi r qt wek» p " gp " Uw' co 2 tlec. " Egpvtqco 2 tlec " { "gn' Ectkdg⁷⁷ " Cuko kuo q. "dclq" guv" r rcp "ug" r tqi tco cdc "s wg" r " r tqf week» p " f g" xgj fawqu "KO X" gp " gucu" dcugu" ur gtcug " r u " 722022 " wpkf cf gu" gp " 4228 " *Vq { qvc. "471: 4226+0Gp" 4234. "nagi q" f g" 32 " c° qu" f g" uw" rcp| co kpvq. "r " xgpv " f g" rqu" xgj fawqu "KO X" ur gtcdc " rqu" 7 " o kmpgu" gp " vqf q " gn' o wpf q " *Vq { qvc. "4234+0" ""

"

³⁷⁶ "Rtlpek r cm gpv. "gn' lpgt eco dlq" f g' cwqr ctvgtc' r gpu' cf q' r etc " r " tgi k» p " f g' CUGCP " f qpf g' r " hdtkecel» p " f g' rqu" eqo r qpgpvu " o " u " ko r qt vpvu " hwg " kplecm gpv " f kxf kf c < " rqu " o qvt gu " f k' ugn' ug " hdtkecdcp " gp " Vckrpf kc. " o qvt gu " f g' i cuqkpc " gp " kpf qpguk " { " rqu " ukugo cu " f g' tcpuo kuko " p " o cpwrgu " gp " Hkr kpcu " g " kpf kc 0 "

³⁷⁷ "Gu' f gek. "ecuk' r " vcrkf cf " f g' Co 2 tlec " Ncvkpc " eqp " r " gzegele » p " f g' O 2 zleq. "gn' ewcn' gu' lpenkf q " gp " r " qti cpk' cel» p " kpvtpcelqpcnf g " Vq { qvc " f g' rqu " f g' r " tgi k» p " f g' Co 2 tlec " f gn' P qt vgt " f cf c " r " eqpgz » p " eqp " gn' o gtecf q " f g' GGWWO "

Tabla III-5 - Principales bases de producción del proyecto IMV

País	Filial	Vehículo de producción	Inicio de producción	Producción anual	Destino de exportación
Tailandia	TMT	Camioneta pickup (Hilux VIGO)	2004	280.000 unidades (incluidas 140.000 para exportación)	Europa, Asia, Oceanía, etc.
		Sport utility vehicle (SUV)	2005		Medio Oriente
Indonesia	TMMIN	Minivan	2004	80.000 unidades (incluidas 10.000 para exportación)	Asia y Medio Oriente
Sudáfrica	TSAM	Camioneta pick up	2005	60.000 unidades (incluidas 30.000 para exportación)	Europa, África, etc.
		Sport utility vehicle (SUV)	2005		
Argentina	TASA	Camioneta pick up	2005	60.000 unidades (incluidas 45.000 para exportación)	América Latina
		Sport utility vehicle (SUV)	2005		

Hwpgv<gmdqtcek>p"r tqr kc"gp"dcug"Vq{ qvc"4234+{"öVq{ qvc"KO X"Rtqlgev"Vcngu"Kkuw"Di "Ugr "Hqty ctf ö"
*47 I: 4226+0

" "

Gur ge"heco gpvg."rc"r tqf week>p"fg"rc"r leniwr "J knwz"ug"fkf k>"gp"tgu"dcugu<Vckrpf kc."
Uwf^a hlec"{"Cti gpvpc"{"guwxq"o qkxcfc"r qt"rc"ec"ff"cf"gr"r" go cpf c"ff" lej q"xgj "pwm"gp"lcr >p"
*Kqj "gv"cr0"423: <74+0F" g"guvg"o qf q."cn'eqo r ctvk"rc"gur gekrkj cek>p"r tqf wekxc"fg"hdtklecpvu"
f g"r leniwr u"J knwz"{"ugt"r ctvg"fg"gr"tq{ gev"KO X."Uwf^a hlec"{"Vckrpf kc"tgr tgugpvc"ecuqu"fg"
eqo r ctcek>p"ko r qtvcpgu"r ctc"eqpvtcuct"gnf gucttqm"fg"Vq{ qvc"Cti gpvpc."cf go^a u"fg"r gpuct"
uw"tgrcek>p"cn'lpvgtkt"fg"rc"gutvewtc"o wnkpcelqpcr0Cn'tgur gevq."gu"ko r qtvcpg"fg"vucect"s wg"
gucu" tgu" hkrngu" pq" eqo r kvgp" f kgevco gpvg" gpvtg" u" f gdkf q" c" s wg" Uwf^a hlec" ug" fg"lec"
r tlpekr cm gpvg" c"rc"r tqf week>p"{"gztvcek>p"fg"J knwz"eqp"gn'xqrcpv"wdkecf q" c"rc"fgtgej c"
*Rj m"gv"cr0"4239+0Cti gpvpc."uqm"ug"fg"lec" c"rc"r tqf week>p"fg"r leniwr u"eqp"xqrcpv"j cek"rc"
k s wgtf c"{"rc"gzrtvcek>p"guv^a f kki kf c"r tlpekr cm gpvg"j cek"Uwf co² tlec."Egpvtqco² tlec"{"gn"
Ectkdg0Vckrpf kc."r qt"uw"r ctvg."r tqf weg"xgj "pwm"eqp"gn'xqrcpv" c"co dqu"rcf qu."r qt"rq"vcpvq."
eqo r kg"gp"rc"r tqf week>p"{"gztvcek>p"fg"J knwz"vcpv"eqp"Uwf^a hlec"eqo q"eqp"Cti gpvpc³⁷⁸"
*I gtgpvg"Vq{ qvc."gpvtgxkuc"r gtuqpcn"35 I: 4243+0"

Vq{ qvc"r qugg"wp"rc"ti c"j kvqtkc"gp"Uwf^a hlec."f qpf g"tcf le>"uw"vtegt" hkrn"hwgtc"fg"
lcr >p0Guc"uwdufk ktkc"gtc"r qugf c"{"eqpvtqrcf c"r qt"wp"hco krc"fg"lpf wwtkrgu"fg"Uwf^a hlec."

³⁷⁸"Gp"grlecq"fg"Co² tlec"fg"gnP qtvg"rc"r leniwr "r tqf wekf c"r qt"Vq{ qvc"gp"O² zleq"{"GGWW"pq"gu"rc"J knwz."ukpq" s wg"
gu"rc" Vq{ qvc" Vceqo c0' Guc" Anko c" vkgpg" cni wpcu" f kgtgpelcu" eqp"rc"r tko gtc"fg"dkf q" c" s wg" pq" gu" wkkj cf c"
r tlpekr cm gpvg"r ctc"r tqeguqu"fg"tcdclq"eqo q"rc"J knwz0C"uw"xgj ."rc" f hkwncf "gp"rc"r gpgtcek>p"fg"guvg"r tqf weq"
gp"gn"o gtecf q" pqtvgco gtlecpq" guv^a " f cf c" f gdkf q" c" rc"r tghgtgpelcu"r qt" xgj "pwm" cAp" o^a u"i tcfp gu"r qt" rqu"
eqpuwo kf qtgu"fg"GGWW" *I gtgpvg"Vq{ qvc."gpvtgxkuc"r gtuqpcn"35 I: 4243+0"

re'ho klc'Y guugru. 's wg'vgr'c'rc'hegpek'r ctc'rc'r tqf week»p"{'eqo gtekrk cek»p'f g'xgj 'fawqu'f g'
re'o ctec'lcr ppguc'OF guf g'gn'eqo kgl q'f g'rc'eqo gtekrk cek»p'f g'rc'r len'w'r 'J kwz'gp'rc'f²ecf c"
f g'3; 92'guv'g'r tqf wev'rkf gt»'uw'ugi o gpv'f gn'o gtecf q.'o w'w'rk cf q'gp'gn'ugevt'r tko ctk'f gn'
r c'ju'»Rj gmq'gv'c'rd'4239<5+0C'uw'xgl . 'cni'v'co dlē p'v'kpg'rc'u'f'p'p'gcu'r tqf we'v'x'cu'f g'mu'xgj 'fawqu'
f g'r cuclgtqu'Eqtqmc"{'S wcpwo 0"

C"r ct'vt'f gn'hp'f gn't²i ko gp'tcekn'f gn'apartheid gp"3; ; 3"gn'i qdkgtpq"uwf ch'kecpq"
ko r w»'rc'lpf wutk'c'wqo qvtk'eqp'r qn'kecu'f g'cvtceek»p"{'h'qo gpv'c"GO u.'m'ewcn'i gpgt»'gn'
etgeko kpv'f gn'ugevt'»Y wwn'g."4243+0Uk"go d'cti q.'gp'mu'r tko gtqu"° qu'f gn'4222."Vq{ qvc."
s wg'ugi w'c'gp'o cpqu'f g'go r t'guctkqu'mecrgu."pq'rkf g'cdc'rc'r tqf week»p'pk'rc'u'g'zr qt'cekpgu."
ukpq's wg'gucdc'r qt'f g't^a u'f g'Xqmuy ci gp."O gtegf gu'Dgp| "{'Ej t { urgt³⁷⁹»Drcem"422; <6; 8+0'
Gp"4224"VO E'r cu»'c'eqvtqnt'gn'97' ³⁷: 'f gn'r cs w'vg'ceekpctk'f g'rc'h'ko c"{'c'r ct'vt'f g'gu'/'
{ 'f g'rc'ko r ngo gp'cek»p'f gn'KO X/"Vq{ qvc'eqo gp| »'c'rkf g'ctc'rc'r tqf week»p"{'rc'u'g'zr qt'cekpgu"
gp'gn'r c'ju'»Nco r t'gej v."422; <32+0C'f go ^a u.'c'te'q' 'f g'guv'eco dlē."Vq{ qvc"UC"eqo gp| »'wpc"
r qn'kecu'f g'f gucttqmq'f g'r tqxggf qt'gu'»m'ecrgu"{'gz'tcplgtqu+0Cu'f'ugi Àp'Drcem"4233<3: : +f g'
rc'u'gpewguc'u'tg'ck' cf cu'c'v'f qu'mu'r tqxggf qt'gu'f gn'r c'ju'ug'ug^o c'rc's wg'Vq{ qvc'g'tc'rc'v'to k'pcn'
s wg'o ^a u'cr q'q' dt'k'p'cdc'r ctc'uw'f gucttqmq'³⁷: "P q'qdu'v'p'v'co dlē p'ug'u'v'kpg'g's wg'mu'o ^a u'
d'gpg'he'kf qu'gp'guv'g'r t'qegu'hw'gt'p'rc'u'r tqxggf qt'cu'o w'v'k'cek'p'crgu"{'pq'mu'cw'qr ct'v'cu'
m'ecrgu's wg'w'x'k'gt'p'f k'x'gt'cu'f h'k'ew'ncf gu'r ctc'm'j t'ct'rc'ec'rk' cf "{'g'uec'rc'f go cp'f'cf'cu'r qt'
Vq{ qvc'»Drcem"4233+0"

Cu'f'r ctc"423; "Vq{ qvc"UC"g'tc'rc'v'to k'pcn's wg'o ^a u'eqv'gp'k'f q'm'ecn'f g'uw'x'gj 'fawqu'
v'p'c'gp'gn'r c'ju'»Y wwn'g."4243<3; +0C'uw'xgl . 'gp"423; "Vq{ qvc'rkf g'cdc'rc'u'x'gp'cu'm'ecrgu'f g'
Uw'f h'kec'eqp"47' "f gn'market share'0Uk"go d'cti q.'gp'p'k'gn'f g'r tqf week»p"{'g'zr qt'cekpgu"
Vq{ qvc'p'q'g'tc'gn'f'f'gt"{'c's wg'ug'w'k'ecdc'r qt'f g't^a u'f g'Xqmuy ci gp.'ew'f'q'x'gj 'fawqu'f g'r cuclgtqu'
Rqm'g'tc'gn'r tko gt'q'gp'r tqf week»p"{'g'zr qt'cekpgu'0C'f go ^a u.'rc"Vq{ qvc"J kwz"v'co dlē p'g'tc"

³⁷⁹"Vq{ qvc'g'p'eqvt»'f h'k'ew'ncf gu'r ctc'i g'p'gt'ct'x'q'Ào gp'gu'f g'zr qt'cek»p'uw'k'ek'p'v'gu'r ctc'eqo r g'puct'uw'f g't'gej qu'
f g'ko r qt'cek»p'f g'eqo r p'p'p'v'gu"{'eqp"ht'gew'pek"ug'x'k'q'gp'rc'r q'ulek»p'f g'v'p'gt's wg'eqo r t'ct'et²f'k'qu'c'rc'
ko r qt'cek»p'f g'zr qt'v'f qt'gu'lp'f gr'p'f k'p'v'gu'f g'eqo r p'p'p'v'gu'»Drcem"422; <6; : +0'

³⁷: 'Gp"422: 'rc'u»'c'eqvtqnt'v'co dlē p'gn'47' 't'guc'p'v'»Nco r t'gej v."422; <485+0'

³⁷: "Culo kuo q.'gn'gl'gew'k'q'f g'Vq{ qvc'Uw'f h'kec'u'v'k'p'g's wg'Vq{ qvc'gu'f g'rc'u'go r t'gucu's wg'o ^a u'm'ecn'k' c'ek»p'f g'
r ct'v'u"{'eqo r p'p'p'v'gu'm'ecrgu'v'k'p'g'gp'gn'r c'ju'lw'v'q'eqp'H'q'tf "{'Xqmuy ci gp'»eqo q'gp'gn'ec'cu'cti g'p'v'p'q'+}ukp'
go d'cti q.'Vq{ qvc'Uw'f h'kec'ko r qt'v'rc'u'o q'v'gt'gu"{'uk'v'go cu'f g'v'c'puo kul»p'»eqo q'gp'gn'ec'cu'cti g'p'v'p'q'+}{'H'q'tf"{'
Xqmuy ci gp'r tqf weg'p'wp'q'q'rc'u'f qu'eqo r p'p'p'v'gu'm'ecm'gp'v'g'gl'gew'k'q'f g'Vq{ qvc'Uw'f h'kec."gp't'g'x'k'v'
v'g'h»p'lec."37 16 14243+0Uk'w'k'p'f q'c'i'gp't'g'x'k'v'c'f q'»tenemos alrededor de 100 proveedores que utilizamos locales:
23 multinacionales (14 japonesas), 12 empresas conjuntas, el resto son proveedores locales puros de SA (es decir,
65). De los proveedores locales puros, obtenemos componentes prensados de acero, como soportes, tuercas y
pernos. Las multinacionales son los proveedores de tipo sistema, como asientos y frenos. Las JV son un poco una
mezcla entre los dos, como radiadores y sistemas de aire acondicionado/enfriamiento. En varios de los modelos,
básicamente tenemos todo localmente excepto motores y transmisiones. Un área que falta es el lado de la
electrónica." *gl'gew'k'q'f g'Vq{ qvc'Uw'f h'kec.'gp't'g'x'k'v'v'g'h»p'lec."37 16 14243+0'

uwr gtcfc"gp"gzr qtvcckpqu"r qt"uw'eqo r gkf qtc"rc"r kenl'wr "o gf kpcp"Hqtf "Tcpi gt"{"r qt"mqu" xgj fwmqu"fg"nmlq"DO Y "Z5"{"O gtegf gu"Dgpl "E"Encuu"xgt"Vcdrc"2/9"fgn" Cpgezq"Gucf f"nkeq+0" Rqt"qvtq"ncf q."gu"kpvtgucpvg"fgucect"s wg"r ctc"423;"gn'eqo gtekq"gzvgtkqt"cwqo qvtk"fg" Uwf^a hlec"gtc"uwr gtcxkctkq."cn'eqpvtctkq"fg"m"swg"uwegf"e"eqp"mqu"rc"u"gu"r tqf wevqtgu"fgn" O gtequw.³⁸²cwps wg'vco dkp'eqpxk"cp"eqp'r tqdngo cu'fg'kpghekgpek'r qt'dclqu'xqnÀo gpgu'fg" r tqf weekp"{"wp"f² dkl'gpvtco cf q'cwqr ctvkuc"Y wwnq."4243<6: /6; +0"

Gp"ewcpvq"cvckrpf kc."gn'qvtq"rc"u"r tqf wevqt"fg"J kwz"{"r ctvg"fgn'r tq{ gevq"KO X."rc" kpf wutkc"cwqo qvtk"lcr qpguc"{"c"eqpvcde"eqp"wp"hwgtvg"r tgugpek"fguf g"rc"2r qec"fg"rc"KUK vckrpf guc0' Vckrpf kc"eqo gpl >"ukgpf q"wp" gurcd>"fg"fgurqecrk cekp"fg"rcu"cwqo qvtkegu" lcr qpgucu'ewcpf q'eqo gpl ctqp'c'kpvtgucpvcckr ctug.'wp'r tqeguq's wg'hwg'ko r wucf q'pq'uqmq'r qt" rcu'go r tgucu."ukpq's wg'vco dkp'r qt'gn'Gucf q'lcr qp²u"O eP co ctc."4233<342/348+0C"tc" f gn' f gur nqi wg'fgn'r rc"KO X."Vckrpf kc"ug'eqpuqrk >"eqo q'wpc'r kgl c'emxg"gp"rc"gut wewtc"fg"rc" go r tguc"cpkxgn'o wpf kcn"{"s wg'eqpegvt>"rc"r tqf weekp"o c{ qtkctk"fgn'o qf grq"J kwz"{"ug" eqpxk v"gp"wp'egpvtq"qr gtcvkxq"fg"gzr qtvcckp"co Ànk'ngu'fgurkpu"Rgvkuq"{"Lqj tk"4228+0" Gwg'r rc"p'r qvpek"rc"r tgugpek"fg"Vq{ qvc"gp"Vckrpf kc."gp"fpf g'ug"gpvcpvcde"fguf g"3; 86."{" guvcde"gp"cuegquq"cr ctvt"fg"rcu'r qn'lecu"fg"r tqo qekp"fgn'i qdkgtpq"{"fg"rc"fgxcnwcekp"fgn' dcj ."rc"o qpgfc"vckrpf guc."nwi q'fg"rc"etkuku'hkpcpekgtc"cul^a vlec"fg"3; ; 9/; : "Mcy cdg."4235+0" C"uw'xgl ."rc"Vq{ qvc"J kwz"{"c"eqpvcde"eqp"i tcp"2 zkq"gp"gn'o gtecf q'vckrpf²u."gp"rc"f²ecf c"fg" 3; ; 2"guvg"o qf grq"ug"wdle>"tgu"co qu'eqo q'gn'xgj fwmq"fg"vqf q'kr q"o^a u'xgpf kf q."{"mqu" tgucpvgu'ukvg"co qu'eqo q'gn'ugi wpf q"o^a u'xgpf kf q0"

"Ven'hwg"gn'f gucttqm"fg"Vq{ qvc"Vckrpf kc"s wg"cr tlpkr kqu"fg"rc"f²ecf c"fgn'4222"ug" cdtk"wp'ugi wpf c'r rc"pvc"fg'r tqf weekp"gp"f kej q'r c"u."fg'hqto c'cn's wg'wpc'fg'gmcu'ug'fg'lecde" c"mqu"xgj fwmqu"fg"r cuclgtqu"{"rc"qvc"cmqu"xgj fwmqu"eqo gtekrqu"Vq{ qvc."4234+0"nwi q."gp" 4229"ug" cdtk"wp"vtegtc"r rc"pvc"fg'lecfc" gzenwukxco gpvg"cr rc"r tqf weekp"fg"J kwz.³⁸³ o ctecpf q'gn'vcurf q'eqo r ngvq"fg"rc"r tqf weekp"fg"r kenl'wr u'Vq{ qvc'hwgtc"fg"lcr >p³⁸⁴"Hwo kq." 4228+0"cf go^a u."gp"rc"tgi kcp"cul^a vlec"ug"guvcdngel"wp"kpvtgeqpgzkp"fg"fgurkpu'cwqr ctvqu"

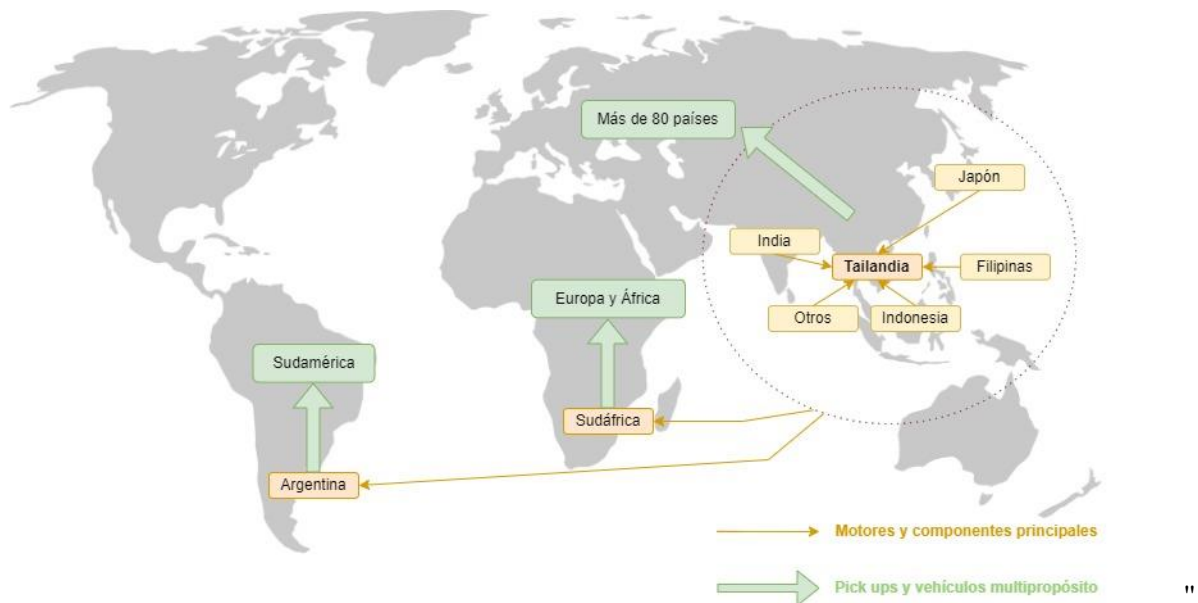
³⁸²"Guc"eqo r cteckp"fg"rc"kp'wutkc"cwqo qvtk"uwf chlekc"eqp"rc"cti gpvpc"gu'vqf ex"o^a u'nco cvkx"uk'ug'vkgp" gp"ewgpc"s wg"Uwf^a hlec"gzr qvc"gn'72' "fg"mqu"xgj fwmqu"r tqf wekf qu'iqecm gpvg"{"ug"gpwgpvtc"gp"wp'r qulekp" i gqi t^a hlec"o w'fg'guxgpvccluc"/r tlpkr cm gpvg'r qt"rc"fg'kucpek"eqp"mqu"o gtecf qu'gwtqr gqu"cmqu"s wg'ngu'gzr qvc" o c{ qto gpvg'."o kgpvtcu"s wg"cti gpvpc"gzr qvc"cti gf gf qt"fgn'97' "fg"mqu"xgj fwmqu"r tqf wekf qu"ug"j cm"o^a u' egtcepq"i gqi t^a hlec"o gpvg"cmqu"fg'gurkpu'c"mqu"s wg'gzr qvc"{"fg"vqf qu"o qf qu."tgi kntc"grgxcf qu'pkxgru"fg"f²hek' eqo gtekrncwqo qvtk"eqo q'ug'xkq"gp"gn'Ec"r fwmq"40"Guc"fg'kgtgpek"gpvqpegu'ug'duc"r tlpkr cm gpvg"gp"rc"o gpqt" ko r qtvcckp"fg"xgj fwmqu"fg"r cuclgtqu"gn'rc"u'uwf chlekc"p0"

³⁸³"C"uw'xgl ."gn'pkxgn'fg"kpvgi tcekp"nqecf"fg"guvg"o qf grq"crecp| >"pkxgru"o w'cncu'egtecpqu'cn'; 7' "eqp"wp" tgucpvg"fg"cwqr ctvqu'fg'cxcp| cf c'vgepqrqi "c"s wg'ug'r tqf wegp"gzewukxco gpvg"gp"lcr >p"Kqj "gv'cn0"423: <75+

³⁸⁴"Cu"Vq{ qvc"Vckrpf kc"crecp| >"rc"r tqf weekp"fg"4"o kmppgu'fg'wpkf cf gu"gp"4226"{"7"o kmppgu'fg'wpkf cf gu"gp" 42320"

enxg."eqo q'o qvqtgu"{'ukungo cu'f g'vcpuo kuk»p."gpvtg'hqu'r c'fuguf g'UGCP . 'kpf kc"{'Lcr »p."eqp" gr kpgvtq"gp"Vckrpf kc'Guvqu"ukungo cu"{'eqo r qpgpvu"uqp"gp'kcf qu'c"Uwf^a h'kec"{'Cti gp'kpc" r ctc'ugt'w'k'cf qu'gp'gn'cto cf q'f g'rcu'r ken'wr u"{'xgi 'f'w'qu'o w'k' tqr »ukq"gp'uw'tq'n'f g'dcugu" o cpw'k'ewt'gtcu't'gi kqpcrgu"Vq{ qvc."38 164225-0"

Figura III-2 – Mapa de la organización internacional del proyecto IMV



Hwpgv-g'grdqtcel»p'r tqr kc"gp'dcug"Vq{ qvc"38 164225-0"

Cf go^a u."gp"Vckrpf kc"ug"guvdrgele»"wpc"hrkcn'f gn'Egpvtq"f g'Rtqf week»p"O w'p'kn'f g" Vq{ qvc."f k'ki k'f q" f guf g"lcr »p.³⁸⁵"gn'ewcn' guvdc" f gf k'cf q"cn'gpvtgpc' k'p'vq" f gn'r gtuqpcn' gp" Vckrpf kc"{'c"r ct'kt" f g'4228"ug"eqpxk'v»"gp"gn'egpvtq" f g'ecr cekcele»p" r ctc"vq' q"Cuk'Guvcu" f gr g'p' g'p'eku'hwtgq'hwgi q'eqpvtq'rc'f cu'r qt'rc'egpvt'c'nt'gi k'p'cn'f g'Vq{ qvc"r ctc"Cuk's w'g'co d'k'p" hw'g'vdrgele'c"gp"Vckrpf kc."eqqt'f k'p'cf q"vq' c'rc"r tqf week»p"{'xgp'w'f g'neq'p'k'p'v'g'OC"uw'xgl . " gp'4225"ug"guvdrgele»"gp"guv'g'r c'f'u'gn'v'teg't'egpvtq" f g'K F "hwgtc" f g"lcr »p.³⁸⁶"f k'ki k'f q" c'ewdtk'rc" t'gi k»p" f g"Cuk"Rce'f'heq."gp"gn'ewcn'ug" f guvdrgele»"ecttq'eg't'f'cu"{'vq' cu'rcu'gur gek'kecele'k'p'gu" gur gek'rcu'r ctc"gn'ò gtecf q'cul'k'leq'Nc"l'p'uv'rc'le»p" f g"guv"Anko q"gu'f g"gur gek'cn't'gr'xc'p'ek"{'c" s w'g'gn'ò kuo q"gu'gn'Àpleq"wd'kecf q"gp'w'p'r c'f'u'gp" f guvdrgele»"g'z'egr w'ep'f q" c'Ej k'p'c+"x'gt"Vcd'rc"2/ 7'f gn'CPgzq'Guv'f'f'w'keq+OG'ne'egpvtq't'gi k'p'cn'f' gn'f g'K F "ug'hw'k'p'ct'q'gp'4229"ht'o cp'f q'Vq{ qvc" O qvqt"Cuk"Rce'f'heq"K'p'i g'p'k'g't'f'c"{'Rtqf week»p" *Toyota Motor Asia Pacific Engineering and

³⁸⁵"Q'v'cu'hrk'c'ng'u'f gn'Egpvtq" f g'Rtqf week»p"O w'p'kn'hw'g't'p'wd'kecf cu'gp'4228"gp'I t'cp'Dt'g'w'° c'r ctc'rc'| q'p'c'g'w't'qr gc" {"gp"GGWW'r ctc"Co² t'lec" f gn'P q't'vg'0"

³⁸⁶"F gp'qo k'p'cf q"egpvtq"V² e'p'leq" f g"Vq{ qvc" r ctc"Cuk"Rce'f'heq" *Vq{ qvc"V'ej p'le'cn'Egpvtq"Cuk"Rce'f'heq"Eq'0'Nf'0" VVECR/VJ +0'Nqu'c'p'v't'k'q't'gu'hw'g't'p'gp"GGWW'r ctc"Co² t'lec" f gn'P q't'vg"{'H'c'p'ek'r ctc"G'w't'qr c'0'R'ct'c"x'gt"rc"r'k'uv'c" eqo r ng'v'f g'egpvtq'f g'K F " f g"Vq{ qvc"gp'gn'ò w'p'f q'eq'p'w'w'ct'gn'Vcd'rc"2/7'f gn'CPgzq'Guv'f'f'w'keq'0"

Manufacturing Co., Ltd+{"ug"etg»"rc"fkxkuk»p"fg"õf gucttqmq"mqecn"fg"r tqxggf qtguõ. "ukgpf q"gn" r tko gt"rc"u"hwgtc"fg"lcr »p"fqpf g"Vq{qvc"etg»"gung"fg"ctwco gpvq"Kqj "gv"cr0"423: +. Guvqu" o qxko kgpvqu"i gpgtctqp" wpc" ecr cekf cf " ko r qtvcpvg" gp" rcu" gvr cu" fg" f kug° q. " kpi gplgt" c" g" kppqxcel»p"fg"rc"ecf gpc"fg"xcmt"gp"Vckrcpf kc"fg"o qf q"vcr"sg"pq"ewo r ng"gpvgtco gpvg"wp"tqn" fg"gpucodmrf qtc"fg"o gpgt"equv"fg"o cpq"fg"qdtc"O eP co etc."4233+0

Nc"ko r qtvcpck"{"gn"fg"gucttqmq"fg"Vq{qvc"gp"Vckrcpf kc"ug"fc"gp"gn"o cteq"fg"wpc"hwgtvg" r tgugpek"fg"rcu"ht"o cu"cwqo qvtkegu"lcr ppgucu"gp"gn"rc"u"{"wp"cegrgtcf q"etgelo kgpvq"fg"rc" r tqf week»p"fg"xgi "ewqu"gp"rcu"Ànko cu"fg"ecf cu"c"r ctvt"fg"rcu"r qn"kecu"fg"gn"i qdkgtpq"r ctc" eqpxgt vtug"gp"õgn"fg"gtqk"fg"Cu"co"ko r wncpf q"wp"kppqxcf qtc"r qn"kecu"kp"fwtkcn"gp"gn"ugevqt" cwqo qvt"r ctc"r tqo qekqpc"wp"õr tqf wev"eco r g»p"pcekqpcrõ.³⁸⁷s wg"gtc"rc"eco kppgv"r kenlwr . " {"gp"gn"ecuq"fg"Vq{qvc."rc"eco kppgv"J kwz"R² tgl "Ct"kec"gv"cr0"4244+0E"qo q"r ctvg"fg"guvcu" r qn"kecu" fg"gn" Guvc"q" vckrcpf² u" ug" gpewgpvtcp" gzgpekppgu" ko r qukkxcu." guv"o wqu" c" rcu" gzt qtcekppgu. "fpgcu"fg"et² f kq"r tghgtgpekrgu. "tgf weekppgu"ctcpegrtkcu"r ctc"rc"ko r qtcek»p"fg" dlkpgu"fg"ecr ken"g"lpuwo qu"kvgt"o gf kqu."gpvtg"qvtqu"»F qpqt."422; +. P cwvf c"{"Vj qdwt"»4242< 348+kpenwq"uqukpgp"s wg"gn"o kuo q"r tq{ gev"»X"gp"Vckrcpf kc"guwxq"lpegpvkxc"q"r qt"gn"3 Å Rrcp"O cgutq"Cwqo qvtk "fg"gn"i qdkgtpq"vckrcpf² u"

C"uw"xgl . "gn"fg"gur rki" wg"fg"Vq{qvc"gp"l"ej q"r c"u"ug"fg"gd"»"co dl² p"c"wp"lgtkg"fg"hevcqtgu" cf kekqpcrgu0Gnr tko gtq"fg"gmqu"hwg"rc"crkcp| c"fg"rc"go r tguc"eqp"rc"² rkg"i qdgtpcpv"v"cf kekqpcr" fg"Vckrcpf kc."m"ewcn"ug"tghngl»"gp"rc"r ctvckr cel»p"ceekqpc"gp"Vq{qvc"O qvt"Vj ckrpf "fg"gn" i tw"q"Uko "Ego gpv"l tqwr ."wpq"fg"mqu"o a"u"cpvki wqu"{"i tcpf gu"eqpi mqo gtcf qu"vckrcpf gugu." eqo q"co dl² p."fg"rc"r ctvckr cel»p"fg"gn"Depeq"fg"Deqi nqm"»Ctpqr . "4228<43: +0Gnlugi wpf q"hwg" rc"fg"gr tgekcel»p"fg"gn"dcvj "»J cuurtg."422; <467+0C"m"cpvgtkqt ug"rg"uwo cp"mqu"VNEu"fg"Vckrcpf kc" gp" CUGCP " {"eqp"lcr »p."Ej kpc."Eqtg"fg"gn"Uwt."Cwutcrk."P wgx" \ gncpf c" g" kpf kc."s wg" r gto kkgtpq"co r rkt"mqu"xqn"»o gpgu"kvgt"eco dlcf qu"rktgu"fg"ctcpegrgu."eqo q"co dl² p."mqu" o gtcef qu"fg"gzr qtcek»p"»Ej gp."4236=Hwo kq."4228+0"

Gug"r tqeguq"v"cpuk"»c"rc"hkcn"fg"Vq{qvc"Vckrcpf kc"rc"t"gur qpucdk"cf "fg"wp"ecf gpc" fg"xcmt"fg"gu"fg"gn"fg"ku"q"{"rc"r tqf week»p"j" cuvc"rcu"vgpvu"{"gzr qtcekppgu"ukp"rc"l"dtkec"o cf tg" gp"lcr »p."fg"go quvtcpf q"wp"o c{qt"i tcf q"fg"kp"gr gpf gpek" g"ko r qtvcpck" gp"rc" guvtwewtc" o wpf ken"fg"VO E"»Mcy cdg."4235+0Uk"dlgp"Vq{qvc"Vckrcpf kc"r tqf weg"wp"co r rkt"i co c"fg" o qf gmqu"gpvtg"mqu"s wg"ug"gpewgpvtcp"»Eco t{."E/J T."Eqtqr"»Cnku."Eqtqr"»Etqu."Hqtwpgt." J keeg."J kwz."Xkqu."[ctku."rc"ko r qtvcpck"fg"rc"J kwz"gu"eqpuk"gtcdng0Gpvtg"mqu"o qf gmqu"fg"gn"

³⁸⁷F kmp"i wk"pf qug"fg"rcu"r qn"kecu"fg"õeco r g»p"pcekqpcrõ"s wg"fg"gur rki" ctqp"lcr »p"{"Eqtg"fg"gn"Uwt"r ctc"fg"gucttqmq" i tcpf gu"go r tguc"pcekqpcrgu"kp"fwtkcn"rgt"gl "Cm cpuk"4242c+0

vf qu'hqu'kr qu'f g'xgj f'ewqu'o a u'xgpf kf qu'gp'gnr c'fu'gptg'4222' { '423; 'r'Vq{ qvc'J kwz'qewr »" gn'r tko gt'hw' ct'36'xgegu." { 'rcu'tgucp'v'u'ekpeq'qewr »'r'r'qulek»p'f'gn'ugi w'pf'q'o a u'xgpf kf q'OE'qp' guc'i tcp'r ct'v'ekr'cek»p'f'g'Vq{ qvc."Vckr'p'f'kc'ug'eqpxk'v'»'gp'wp'q'f'g'm'u'33'r'c'fu'gu'f'g'o c{qt' r'qf'wek»p'f'g'xgj f'ewqu'f'gn'o w'pf'q."f'q'p'f'g'Vq{ qvc'g'z'r'nek'gn'52' 'f'g'uw'r'qf'wek»p'v'q'cn'gp' 423; 0'c'f'go a u."eqp'uw'g'ut'c'v'gi'kc'g'z'r'q't'w'f'q'tc'Vq{ qvc'ug'eqpxk'v'»'gn'f'f'gt'gp'g'z'r'q't'v'ek'p'p'gu'f'g' x'gj' f'ewqu'gp'g'ug'r'c'fu'c'uk'v'ek'q'0'c'uf'Vckr'p'f'kc'r'cu'»'f'g'v'p'p'gt'wp'uw'r'gt'a'x'k'v'eqo'g'tek'n'c'w'qo'q'v'k' " f'g'482'o'k'm'p'p'gu'f'g'f'»'r'c't'gu'gp'gn'4222'c'38'0'222'o'k'm'p'p'gu'gp'423; . 'eqpxk'v'ek'p'f'q'ug'gp'wp'q'f'g'm'u' r'c'fu'gu'eqp'o'c{qt'2'z'k'q'gp'gn'eqo'g'tek'q'g'z'v'g't'k'q't'c'w'qo'q'v'k' "gp'gn'uki'm'Z'Z'K'R'2't'g'l' 'C't'v'ek'g'v'c'f'o' 4244'0'

Gp't'guwo'gp."c'r'ct'v'k'f'gn'r'tq{g'ev'q'JO'X'ug'g'uc'd'ng'ek'gt'qp'r'u'r'r'v'ch'q'to'cu'r'q'f'w'ek'x'cu' hw'g'tc'f'g'L'cr'»p'r'ctc'ek'gt'v'qu'o'q'f'g'm'u'g'ur'g'e'f'he'qu'gp'f'q'p'f'g'C'ti'g'p'v'k'p'c'w'x'q'w'p'hw' ct'r'tko'q't'f'k'cn' c'n'eq'p'ep'p't'ct'r'r'q'f'wek»p'f'g'r'k'cn'w'r'u" { "U'W'X'u'r'ctc'r'c'o'c{qt'r'ct'v'g'f'g'Co'2't'lec'N'c'v'k'p'c'0'G'ug' r'nc'p'gu'gn's'w'g'f'g'uf'g'nc'ecuc'o'c'v'k'k' "o'ctec'gn'ug'p'f'gt'q'f'g'nc' "h'k'k'cn'cti'g'p'v'k'p'c'r'ctc'm'u'r't'»z'ko'qu' c'o'qu'f'g'v'g'to'k'p'c'p'f'q'uw'g'ur'g'ek'cn'k'cek»p'r'q'f'w'ek'x'c.'t'q'n'f'gn'o'g'tec'f'q'k'p'v'g't'p'q'cti'g'p'v'k'p'q" { "f'g'v'k'p'qu' f'g'g'z'r'q't'v'ek'»p'0'U'k'p' go'd'cti'q."f'le'j'qu'o'g'tec'f'qu'f'g'g'z'r'q't'v'ek'»p'p'q"u'q'p'g'u'v'v'ek'qu'p'k'g'u'v'p" v'q'v'c'm'g'p'v'g'f'g'uki'p'c'f'qu'r'q't'nc'ecuc'o'c'v'k'k' ."eqo'q'ug'x'gt'a' "gp'gn'r't'»z'ko'q'ec'r'f'w'w'q'r'ctc'gn'ecuc'q' c'ti'g'p'v'k'p'q'0"

C'uw'x'g'l'."r'c'uki'p'cek»p'f'g'g'v'qu't'q'ng'u'r'nc'p'v'g'c'gn'r'w'p'v'q'f'g'eqo'r'ct'cek»p" { "eqo'r'g'v'g'p'ek' f'g'nc' "h'k'k'cn'cti'g'p'v'k'p'c'eqp'nc'v'ck'r'p'f'guc'ó" { "gp'o'g'p'q't'o'g'f'k'f'c'nc'uw'f'c'h'k'ec'p'c'/"c'n'k'p'v'g't'k'q't'f'g'nc' g'ut'w'ew't'c'o'w'nk'p'cek'q'p'c'n'f'g'V'q{q'vc'0'G'm'q'o'ctc'»'m'u'c'n'q'u'p'k'x'g'ng'u'f'g'g'z'k'i'g'p'ek'gp'm'u'r't'q'eg'ug'u' r'q'f'w'ek'x'qu's'w'g'nc'r'nc'p'v'c'cti'g'p'v'k'p'c'f'g'd'k'»'ewo'r'nt'gp'h'q'u'r't'»z'ko'qu'c'o'qu'r'ctc'p'q'c'ng'l'ct'ug'f'g'm'u' g'u'v'p'f'ct'gu'm'i't'c'f'qu'gp'V'ck'r'p'f'kc."w'p'c'f'g'nc'u'w'p'k'f'c'f'g'u'o'c'p'w'k'ew'w't'g't'cu'o'a'u'ko'r'q't'v'c'p'v'g'u'f'g' V'q{q'vc'hw'g'tc'L'cr'»p'0'C'uw'x'g'l'."g'v'q'v'i'g'p'g't'»w'p'r't'q'eg'ug'u'f'g'c'nc'eqo'r'g'v'g'p'ek'g'p'v't'g'nc' "h'k'k'cn' c'ti'g'p'v'k'p'c" { "v'ck'r'p'f'guc's'w'g.'eqo'q'ug'x'gt'a' "gp'gn'r't'»z'ko'q'ec'r'f'w'w'q'."gp'f'g'v'g'to'k'p'c'f'cu'ek't'ew'p'w'c'p'ek'cu' g'u'k'p'en'w'q"o'c{qt's'w'g'nc's'w'g'ug'f'c'eqp'v'g'to'k'p'c'ng'u'f'g'q'v'c'cu'go'r't'g'uc'u'0'N'c'f'k'p'a'o'k'ec'f'g'g'v'c' eqo'r'g'v'g'p'ek' "o'ctc'»" nc'r'q'uk'k'k'f'c'f'f'g'VCUC" f'g'g'z'r'q't'v'c't'c"o'g'tec'f'qu'nc'v'k'p'q'co'g't'k'ec'p'qu' c'd'c'v'g'ek'f'qu'r'q't'V'ck'r'p'f'kc'0'

3.7 – El devenir de TMC luego de la crisis mundial de 2008

F'g'uf'g'gn'4222'cn'4229'nc'r'q'f'wek»p'f'g'V'q{q'vc'gp'gn'o'w'p'f'q'et'g'ek'»w'p'62' ."f'g'nc'ew'cn' o'a'u'f'g'nc'o'k'c'f'g't'c't'g'c'k'k'f'c'f'c'hw'g'tc'f'g'L'cr'»p'r'q't'r'tko'g't'c'x'g'l' "gp'uw'j'k'v'q't'k'c'x'gt'I't'a'he'q'KKK3'0'

Gp'gn'gzvgtkqt. "Vq{qvc'eqpvdc'eqp'75'r'ncpvcu'r tqf wekxcu'gp'49'r c'fugu³⁸⁸'C'uw'xgl. 'gp'4223'ug'
qdwxkgtqp'i cpcpeku'qr gtcvxcu'r qt'3.; 5'v'kmpgu'f g'gp' r' cucpf q'gn'v'km>p'r qt'r tko gtc'xgl. "
{'ug'eqpxk'v'gp'nc'r tko gtc'go r t'guc'lcr qpguc'gp'uw'gtct'wp'v'km>p'f g'gp'gp'i cpcpeku'pgvcu'
gp'nc'j kvqtk'v'Vq{qvc.'4234+0Gp'gug'b cteq'f g'etgelo kgpv'cegrgtcf q.'nc'etkuku'b wpf kcnf g'422: "
ko r cev>'hwgtvgo gpv'gp'Vq{qvc.'i'gp'gtcpf q'ewcpv'kucur'²tf kfcu'r ctc'nc'go r t'guc'xgt'I t^a hleq'
2/9'f gn'Cpgzq'Guvf'f'v'keq+0Cf go^a u.'gp'4232'ug'tgi kvctcp'nc'nc'u'v'epkecu'gp'xgj 'f'w'qu'f g'
Vq{qvc's wg'ecwuctqp'f gpwpeku'{'o'wncu'c'nc'eqo r c'o'f'c'c'pf q'nc'ko ci gp'f g'cnc'ecrk'cf'f g'
ncu'r tqf wequ'f g'nc'go r t'guc'xgt'qy f j wt'.'.4236+0C'uw'xgl. 'gp'4233'gn'vgttgo qvq'{'uwpco k'f g'
Vqj qm'gp'Lcr >p'r gtlwf k'gp'i tcp'o'gf kfc'c'nc'ecf gpc'f g'r tqf week>p'f g'Vq{qvc'Lcr >p'{'u'w'
g'zr qt'cekppgu'0C'uko kuo q.'ncu'lxg'gtcu'k'w'pf cekppgu'gp'Vckrpf k'gp'4233'chgevtcp'hwgtvgo gpv'
c'Vq{qvc'Vckrpf k'0"

C'r ctvt'f g'guqu'uweguqu.'nc'ht'o c'cvtcxgu>'f kvk'p'qu'eco dkqu'0'Gp'r tko gt'nci ct.'nc'
r t'gukf gpekc'f g'nc'eqo r c'o'f'c'eco dk>.'cuwo kgp'q'c'nc'q'Vq{qvc'gn'o c'pf q'f g'nc'gp'422; 0'Eqp'
gug'eco dk'f g'f'k'geek>p.'nc'eqo r c'o'f'c'v'gto k'p>'eqp'nc'r q'nc'f'g'o c'pf q'gp'b cpqu'f g'gl'gewkxqu'
r qt'hwgtc'f g'nc'nc'o k'k'c's wg'k'penw'>'v'gu'r t'gukf gpeku'f guf g'3; ; 7'j cuvc'422; ³⁸⁹xgt'Vcdnc'2/5'
f gn'Cpgzq'Guvf'f'v'keq+0Cf go^a u.'VO E'f g'hp'k'>'wpc'g'utcvgi k'c'f g'cr w'guc'gp'o c'c'qt'o'gf kfc'c'
ncu'r c'f'gu'gp'f gucttqmq'f g'hqto c'nc'nc's wg'ncu'x'gpvcu'v'q'v'ncu'f g'guc'u'tgi k'ppgu'r cu'gp'f gn'62' 'nc'
72' 'f g'4232'c'4237.'f kvtkdw'²pf q'ncu'gs w'k'c'v'x'co gpv'eqp'ncu'r c'f'gu'f gucttqmf qu'xgt'Vq{qvc.'
4234+0Rqt'qvtq'ncf q.'nc'etkuku'f gucvf c'r qt'gn'uwpco k'f g'4233'nc'r gto k'k'c'c'Vq{qvc'eqo r t'gpf gt'
nc'ht'ci k'k'cf'f g'ncu'ecf gpcu'f g'r tqxggf qt'gu'ht'gpv'c'ncu'f kvk'p'cu'cf xgtukf cf gu'{'s wg'ncu'
f kutw'ekppgu' gp'nc'ecf gpc'eqv'k'p'wct^a p'v'p'k'gp'q' nc'ct' gp'ncu' r t'qeguqu' f g' r tqf week>p'
o c'p'w'cewtgtc'0'Rqt'f lej qu'o q'v'xqu.'ko r w'nc'>'wp'p'w'xq'o qf q'f g'c'nc'cegpco kgpv'f g'r ct'v'gu'{'
r k'gl'cu'eqp'gn'ewnc'i cp>'>o c'c'qt't'guk'k'gpekc'ht'gpv'c'ncu'k'p'vgtt'w'ekppgu'f g'nc'ecf gpc'xgt'Uko r nc'Y'cni'
U'0'4243+0"

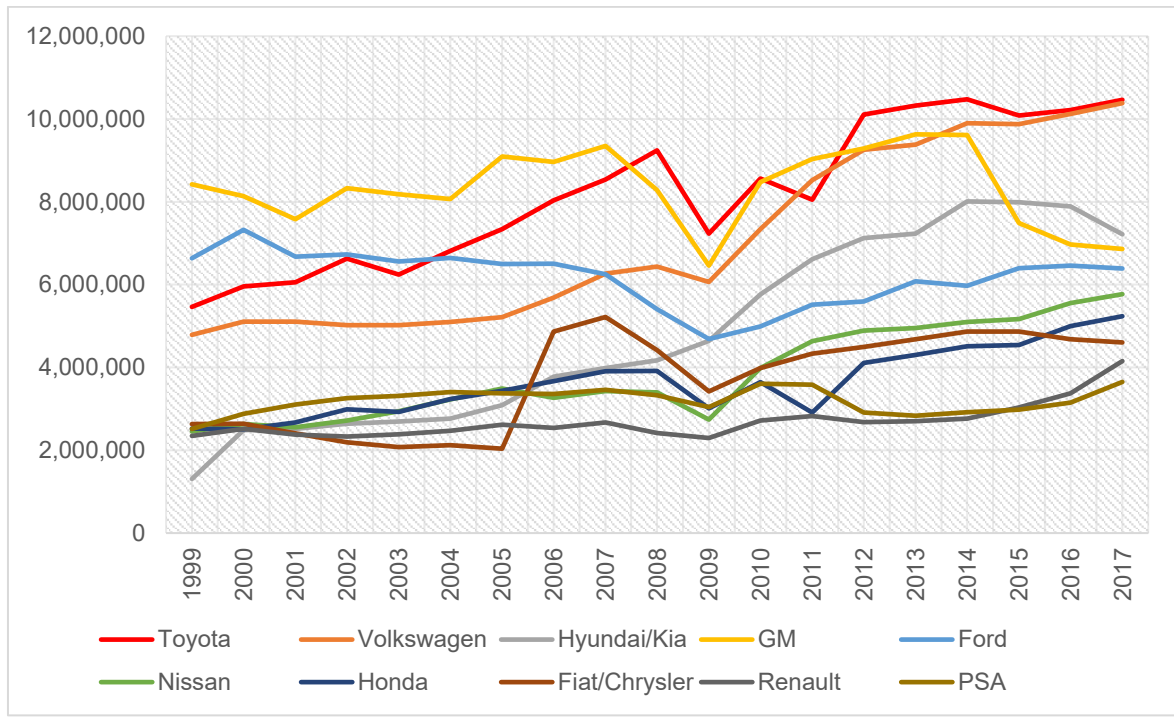
C'r guct'f g'ncu'ko r cequ'f g'nc'etkuku'f g'ncu'j k'q'v'gecu'uwdr tko g'f g'GGWW'{'f g'ncu'
ecv^a utq'ghu'pcw't'crgu'gp'Lcr >p'{'Vckrpf k.'nc'ht'o c'lcr qpguc'ug't'gewr gt>'x'g'nc'g' o gpv'gp'ncu'
c'o'qu'uki w'k'p'v'gu'0'F g'gug'>o qf q.'f g'ncu'9'o k'mp'gu'f g'xgj 'f'w'qu' r tqf wek'qu' gp'4229'hwg'
cwo gpvc'pf q'nc'r tqf week>p'b w'pf kcnj cuvc'gn'4232'{'o'cpw'xq'f lej q'r kuq'gp'ncu'c'o'qu'r quvgtkqt'gu'
Nc'Ap'kec'cwqo q'v'k' 's wg'v'co dk'p'c'nc'cp'>'nc'r tqf week>p'f g'32'o k'mp'gu'f g'w'pk'cf gu'c'p'k'gn'
i'nc'd'nc'gu'X'qm'y ci gp'c'r ct'vt'f g'4238'xgt'I t^a hleq'k'k'k'6+0F g'hqto c'uko k'nc.'gp'v'to k'pqu'f g'ncu'

³⁸⁸F g'q'f qu'o qf qu.'c'r guct'f g'nc'hwgtv'g'zr cpuk'p'f g'Vq{qvc'c'p'k'gn'o w'pf kcn'nc'ht'o c'uki w'k'v'p'k'gp'q'wpc'hwgtv'
r t'gugpekc'k'pf w'nt'kcn'gp'Lcr >p'eqo q'r ct'v'g'uw'g'utcvgi k'nc'f'glo. '4242+0'

³⁸⁹C'n't'gur gevq.'Ej qy f j wt'{'4236+'uqu'k'gp'g's wg'f w'cp'v'g'gug'r g'f'q'f g'r t'gukf gpeku'f g'g'z'v'ch'co k'k'ct'gu'Vq{qvc'
etgelo'cegrgtcf co gpv'g'r g'q'f g'lepf q'f g'nc'f q'c'nc'w'qu'f g'ncu'x'c'nc'gt'gu'hw'pf cekppcrgu'f g'nc'go r t'guc'r ctc'eco dk'ct'ncu'
r qt'wp'r gp'wco kgpv'f g'eqtv'f'nc'q'f g'etgelo kgpv'c'b'c'c'qt'gu'eqv'q'0'

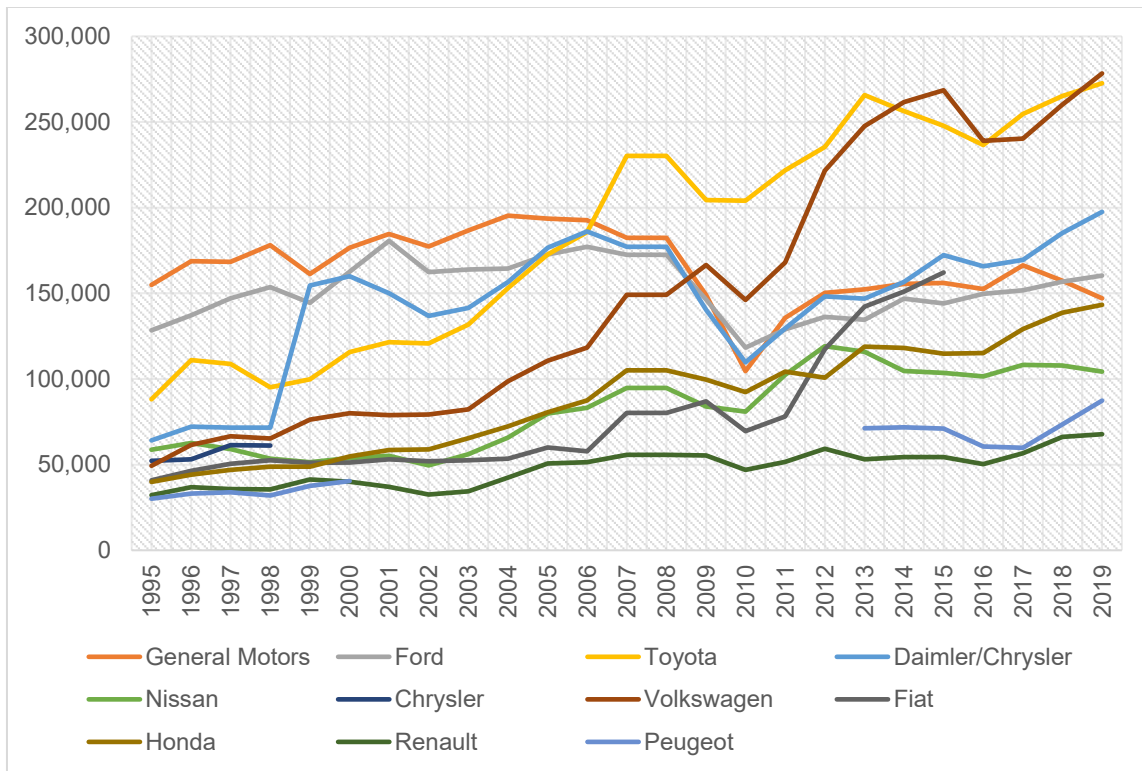
kpi tguqu'i mdcngu'f g'rc' hto c'eqo r c'cf qu'eqp'gnitguv'f g'rcu'vgo kpcngu'o wmpckqpcngu. "Vq{ qvc"
 hwg'wpc'f g'rcu'swg'o glqt'ug'f gugo r g° »"gp'mqu'c° qu'uki wkpvgu'c'rc'etkuku."ceqo r c° cf c'gp'guc"
 vpf gpek" vo dk² p" r qt" Xqmuy ci gp0' Cn' t gur gevq." rc' hto c" lcr qpguc" hwg' rc" Àplec" f g' rcu"
 cwqo qvlegu'swg"qdwqxq" kpi tguqu'r qt" gpek c'f g'rcu'422"o kgu'f g'o kmpgu'f g'f »nctgu'r qt" c° q"
 f guf g'gn'4229. "ukpf q'cncp| cf c'r qt" Xqmuy ci gp'tgek² p"gp"4234"°xgt" I tª hlcq"KKK7-0"

Gráfico III-4 - Producción anual de vehículos por empresa (unidades) (2000-2017)



Hwpgv-g'ndqtckp'r tqr k'gp'dcug'c'QIEC0"

Gráfico III-5 - Ingresos anuales de cada terminal automotriz (millones de dólares) (1995-2019)

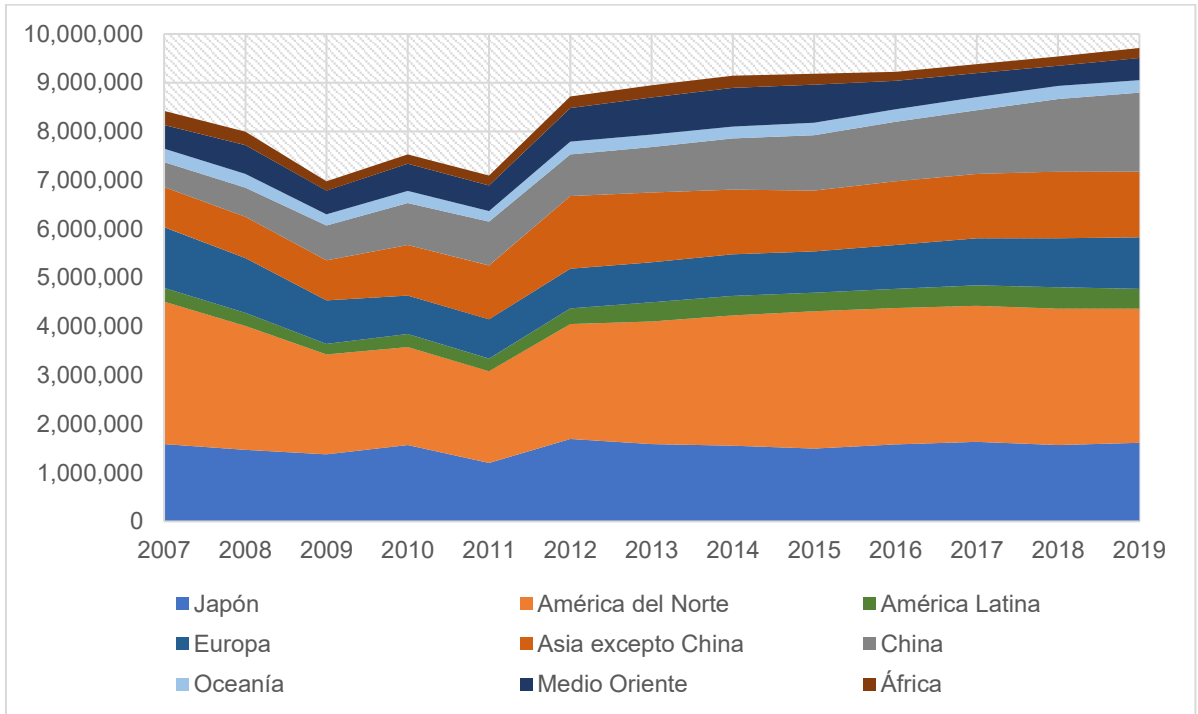


Hwpgv<grdqtc&p'r tqr k'gp'dcug'crltcpnki 'I mdcni722'f g'Hqt wpg0

Rqt"qvtq"rcf q. "gn'r guq'f g"mqu'r tlpekrcgu'egvtqu'f g'r tqf wek&p"{"xgpvcu'gp'gn'o wpf q" eco dlctqp'ngxgo gpvg'f guf g'rc'etkuku'o wpf kci00 kgpvtcu'f wcpvg'rc'f²ecf c'f g'3; ; 2"{'r tlpekrcqu' f gn'4222'GGWW"{'Gwtqr c'hwtq'p'mqu'r tlpekrcgu'o gtecf qu'f g'f guk&gp'rc'gutcvgi k'f mdcnif g" Vq{qvc" *Hwo kq."4228+."gp'rcu'Anko cu'f²ecf cu."mqu'r tlpekrcgu'o gtecf qu'f g"xgpvcu'f g"Vq{qvc" hwgtq'eco dlcpf q'ngxgo gpvg'c'pwgxqu'r wvqu0Gp'r ct k&wrt."ug'f gur ngi »"wp'guncpeco kpvq'f g" mqu'o gtecf qu'o a u'f go cpf cpvqu'f g'xgi f&wqu"Vq{qvc"eqo q'GGWW."Lcr »p"{"Gwtqr c"{'f g"qvtqu" o gtecf qu's wg."cAp'ukp'ugt"vcp"ko r qtvcvqu'r ctc'rc"go r tguc."vco dk&p"tgtqegf k&tq'ngxgo gpvg" eqo q'rcu'tgi kppgu'f g'Qegcp'f."O gf kq'Qtkgpvg"{'f hlec0Eqo q'eqvt&rc'ctvg'f g'gug'r tqeguq."ug" gxkf gpek&"wp'etgelo kpvq'cegntcf q'f g'Ej kpc."s wg'kpetgo gpw»'rcu'xgpvcu'wp'439' "gpvtg'4229" {"423; "{'mgi »"c'eqo r tct'o a u'xgi f&wqu"Vq{qvc"wg"Lcr »p"gp'423; 0Rqt"qvtq"rcf q."ug'tgi kmt»" wp'cwo gpvq'f g'rc'tgi k&p'f g'CUGCP"eqo q'f guk&gp'f g'xgpvcu'f g'wplf cf gu"Vq{qvc."s wg'etgelo"wp" 8: ' "gpvtg'4229"{'423; *xgt'I t'a h&c'kk8+0C'uw'xgl .o kgpvtcu'GGWWj cd'f'ukf q'j kwt&tleco gpvg" gn'o c{qt'egvtq'f g'r tqf wek&p"o wpf kci'f g"Vq{qvc"hwgtc'f g'Lcr »p."c'r ct&t'f g'423: "Ej kpc"m" uwr gt»'gp'rc'ecp&cf 'f g'wplf cf gu'r tqf wek&cu."f cpf q'ewgpvc'f g'rc'etg&kpvg'ko r qtvcpek'f g'gug"

r c"u" gp" grl pwxq" uki nq." cpvq" eqo q" egpvtq" f g" xgpvcu" eqo q" f g" r tqf week»p" f g" xgj ¶ewrqu"
 Vq{ qvc^{38: 38:} "xgt" I t^a hequ"4. "8" { "9+0"

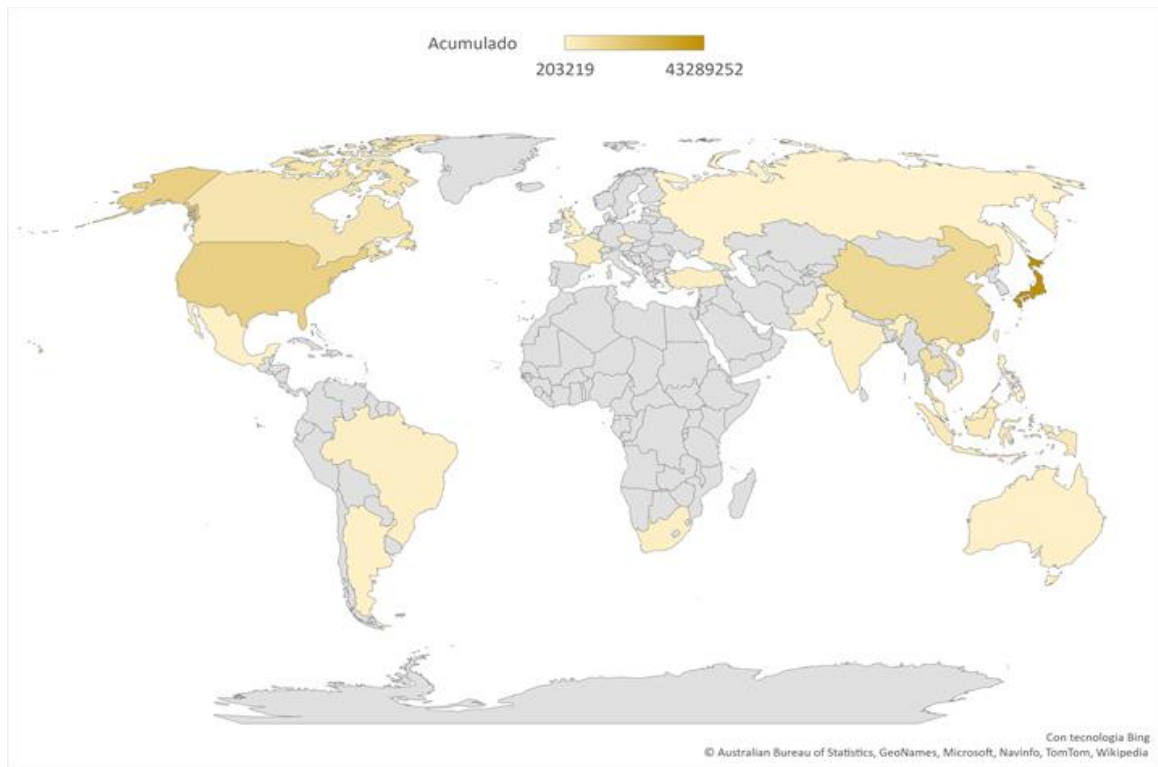
Gráfico III-6 - Ventas de vehículos de Toyota en principales regiones y países (unidades) (2007-2019)



Hwgpv<grcdqtck»p"r tqr lc"gp"dcug"c"Vq{ qvc" I nqdcrl'

^{38:} "C"uw'xgl . "gp" Ej lpc'ug'j cp"lpucrf q"tgu'egpvtqu'f g"K F "f g"Vq{ qvc" xgt"Vcdrc'2/7" f grlCpgzq'Gucf ¶u'neq+0'
^{38:} "F g"vqf qu"o qf qu."Vq{ qvc" uki vg"o cpvplpfp q" wpc"hwgtvg"r tgugpek"lpf wutkn'gp"lcr »p" { "rcu" f gekukpgu"o " a u"
 ko r qtcvpgu'f g"rc"eqo r c° ¶c"ug"tgcrl cp"gp"rc"ecuc"o ctk "J glo ."4242+"

Gráfico III-7 - Producción acumulada de Toyota por país entre 2007 y 2019 (unidades)*



Hwpgv<grdqtc&p'r tqr k'gp'dcug'c'Vq{qc'I mdcn0'
 , Ug'gzegr vÀcp'ru'r c'p'gu'eqp'o w' 'dcl'r tqf weekp0'
 "

" Gp" guvg" eqpvz vq" ecdg" f guxect" s wg" gn" tqn' f g" Co 2 tlec" Ncvkpc³⁹²" gp" rc" gunt wewtc"
 o wkpcekqpcn' f g" Vq{qc" pq" gu" f g" i tcp" ko r qt vpekc0' Gp" tgr&ekp" eqp" rcu" xgpvcu" f g" rc"
 o wkpcekqpcn'rc'tgi k&p"u>mq"gzr rle>>"gn'6' "f g'mqu'xgi p'wru'f gur cej cf qu'r qt "Vq{qc" c'pk&gn'
 i mdcn'gpvtg"4229"{'423; . 'f g'm'ewcn'rc"o kcf "f g'gmqu'hwg'xgpf kf c"gp"Dtcukn'Ukp"go dci q."c"
 r guct'f g'guvg'r gs wg° q'r cr gn'rcu'xgpvcu'gp'Co 2 tlec'Ncvkpc'etgekgtp'wp'68' "gpvtg"4229"{'423; . "
 mq's wg'f gpqc'wp'o gtecf q'gp'gzr cpukp0'Gp'v2 to kpqu'r tqf wekxqu.'Cti gpv&pc"{' 'Dtcukn'gzr rlecp"
 gn'4.7' "f g'rc'r tqf weekp'o wpf knif g'Vq{qc"gpvtg"4229"{'423; . 'f g'rc'ewcn'3.7' "eqttgur qpf g" c"
 Dtcukn'{'3' "c'Cti gpv&pc0'F g'o qf q'uko k&rc" s wg'rcu'xgpvcu."rc'r tqf weekp"vco dk2 p'etgek&"gpvtg"
 4229"{'423; . 'ukgpf q'rc'f g'Dtcukn'wp'422' "{'rc'f g'Cti gpv&pc': 3' 'o c{qt'gp'423; 0'F g'guvc'hqto c."
 ug'r wgf g'xgt" s wg'uk'dk&p"gu'wpc'tgi k&p" s wg'gzr rlec'r r qtegpvc'lg'u'o w' 'dclqu'f g'rc'r tqf weekp"{' "
 rcu'xgpvcu'f g'Vq{qc" c'pk&gn' i mdcn'vco dk2 p'tgr tgugp>>'wpq'f g'mqu'r qequ'o gtecf qu'f kp^a o kequ"
 gp'gzr cpukp"gp'gucuf^2 ecf cu0"
 "

³⁹² Gzegr wcpf q'O 2 zleq' s wg'gp'rc'lti cpk c&ekp'kpvt pcekqpcn'f g'Vq{qc'hqto c'r ctvg'f gn'b gtecf q'pqt vco gtlekcpq0'

Conclusiones parciales

F wtpvq"gn'r tguqpvq"ecr ¶w¶q"ug"tgxk»"wpc"r ctvg"f g"rc"incrustación"internacional"f g" Vq{qvc"Cti gpvpc"gp"rc"gutwewtc"o wmpceqpcnif g"VO E0Rctc"gmq"ug"cpcrik »"gn'uwti ko kpvq." kf gpvk cf "{ "f gucttqm" f g"rc"vtcupceqpcnif Cuf ¶"ug"eqo gp| »"rc"ugeek»p"tgeqputw{ gpf q"uw"qt ki gp" gp"Lcr »p" c"r ctvk" f g"mq"cf grcpvqu"vgepqn»i lequ"ko r ngo gpvcf qu"gp"rc"r tqf week»p"vgz vki{ "gp"gn' o cteq" f gn'etgelo kpvq" geqp»o leq" f gn'r c¶u" { "f g"uw" kpf wwtk" cwqo qvk ¶C" uw" xgl ."ug"j c" gzr rkecf q"gn'ukvgo c" f g"r tqf week»p"Vq{qvc."gn'ewcn'ko r rke»."gpvtg"qvtcu"equcu."gn'o 2 vqf q" f g" r tqf week»p"hgzkdrq"just in time" { "wpc"eqqr gtcvxc"tgnc»p" f g"rc"ti q' r r| q'eqp"uwu'r tqxggf qtgu0' F lej q'ukvgo c"hwg"wp"mqeq" f g"cvp»p" c"r ctvk" f g"rc" f 2 ecf c" f g"3; 92."{ c" s wg"ug"ctvew»"eqp"mq" eco dkqu"o wpf krgu" f gn'ecr kcrkuo q" { "eqpf gp»"gn'r cug" f g"rc" r tqf week»p"gp"o cuc"fordista c"rc" r tqf week»p"hgzkdrq"toyotista { "ng"r gto k»" c"rc" go r tgu"eqpuqkf ctug"gp"mq"o a u"cnq" f g"rc" eqo r gvp»k"cwqo qvk "o wpf kcr0'

Rqt"qvtq"rcf q."ug"cpcrik »"vco dl2 p"rc" xkuk»p"eqtr qtcvxc" f g"rc" go r tgu".s wg"ug"qt ki k»" f guf g"uw"pceko kpvq"gp"rc"cevkxkf cf "vgz vki0Guc"Anko c"guwxq" f guf g"uwu"lplekqu"r tqo qxkf c"eqp" dcugu"gp"gn'r gpuc kpvq" c"rc"ti q' r r| q" { "rc"o glqtc"eqpvpc0C"o gf kf c" s wg"rc"eqo r c° ¶c"ug" f gucttqm». "guvqu"r tkpek kqu"hwgtqp"eco dlcpf q" { "cf cr v³ pf qug" c"mq" f gucl¶qu"eq { wpwrcrgu."gpvtg" mq"ewcrgu"ug"tgucnctqp"mq"xlpewrcf qu"cn'r tqeguq" f g"lpvgt pceqpcnif cel»p" f g"rc" hto c0Co dqu" grgo gpvqu"cs w¶" f guetk vqu."vcpvq"uw"ukvgo c" f g"r tqf week»p."eqo q"uw"xkuk»p" go r tguclcn"uqp" cur gevqu"emxg" f g"rc" gutcvgi k" go r tguclcnif g"Vq{qvc."vcpvq"gp"uwu"lplekqu"gp"Lcr »p."eqo q"gp" uw"gzr gtlp»k"o wmpceqpcn"r qt"mq"vcpvq."uqp"vco dl2 p"wp" hcevt f gvgo kpcpvq"r ctc"gpvqpf gt"rc" vtc { gevqtk"gzegr ekpcnif g"rc" hto c"lcr qpguc"gp"Cti gpvpc0'

Cf go a u."ug"gzco k»" f gvqpkf co gpvq"gn'r tqeguq" f g"gzr cpuk»p" { "i mqdcrik cel»p" f g"rc" hto c0Gp"r tko gt"ni ct."ug" f guetkdkgtqp"rcu"r tkpek crgu"ectcevt¶vkecu" f g"i qdgtpcp| c" f g"rc" eqo r c° ¶c" c"mq"rc"ti q' f gn'vgo r q" { "ug"tgeqputw{ »"rc"tgf" f g"ceekqpkvqu"r tkpek crgu" f gpvtq" f g"mq" ewcrgu"ug" gpeqvtctqp"vgtu"i twr qu"o c { qtkctkqu<hto cu" hpcpektcu"lcr qpguc."go r tgu" f gn' I twr q"Vq{qvc" { "go r tgu" hpcpektcu" f g"GGWW."t gur gevxc co gpvq0C"uw" xgl ."ug"r tgu»"gur gekn' cvp»k»p" c"rc" hto c" s wg"cf s vktk»"ecf c" hrcn'gp"rc" gutwewtc"i mqdcrik f g"rc" hto c0"

Nqu"egpvtqu" f g"o cpwcewte" { "f gur cej q"o a u"ko r qtvcvqu"j celk" hpcrgu" f g"uki mq"r cucf q" guwxkgtqp"r qucf qu"gp"GGWW" { "Gwtqr c."r qt"j cdgt"ukf q"mq"egpvtqu" f g"o c { qt" f go cpf c"lwpvq" eqp"Lcr »p0Ukp"go deti q."eqp"gn'eqo kgp| q' f gn'pwxq"uki mq" { "gn'guvpeco kpvq" f g"guvqu"o gtecf qu" f gucttqmcf qu."qvtcu" hrcrgu" vqo ctqp"wp" tqn' o a u" r tqvci »pleq." r tkpek cno gpvq" gp"rc" tgi k»p" cuk² vce0Cuf ¶"tgucnc"gn'r cr gn' f g"Ej kpc."gn'ewcn'hwg"i cpcpf q' r tqvci qpkuo q"vcpvq"eqo q"egpvtq" f g" xgpvcu"eqo q" f g"r tqf week»p" f g"Vq{qvc0'Ugi vkf q" c" guvq"ecuq"ug" gpeqvtctqp"mq"r c¶u" f g"

CUGCP . 's wg'co dk2 p'hwgtqp'f g'et gekpvg'ko r qtvcpek'r ctc'rc'htc c'ler qpuc0Gp'gur gekn'gpvtg' guqu'Ànko qu'tgucnc'gn'ecuq" f g"Vckrcpf kc."s wg"ug"eqphqto »"eqo q"wpcu" f g"rcu"htcrgu"o a u' ko r qtvcpgu" gp" rc" gutwewtc" o wmkpcekqpcn' f g" Vq{ qvc." eqpxk v2 pf qug" gp" wp" egpvtq" f g" r tqf week»p" { "gZR qtveek»p" c" wpc" o wmk r nek cf " f g" r c" f ugu" { "gnr wpvq" f g" tghgt gpek" o wpf knf g"rc" hdtlecek»p" f g"rc" r keni'wr "J kwz0"

Rqt"qtq"rcf q."ug"j cm»"s wg"rc"tgi k»p"uwf co gtlekpc"gzr nek"r qtegpvcigu"o w{ "dclqu" f g"rc" r tqf week»p" { "rcu" xgpvcu" f g" Vq{ qvc" c'pkxgni mdcn" r gtq" s wg'co dk2 p' tgr tguqp»" wpq" f g" iqu' r qequ" o gtecf qu' f kp^a o lequ" gp" gzr cpuk»p" gp"rcu"Ànko cu' f² ecf cu'0Gp" r ct vewrt. "c" r ct vkt" f gnr tq{ gevq" KO X. 'Cti gpvpc"wxq"wp" hvi ct' r tko qtf kn'cn'eqpepvtct'rc" r tqf week»p" f g"rc" keni'wr u" { "UWXu" r ctc" Co² tlec'Nevpc"gp"wp"eqpvz vq" f g"gzr cpuk»p" f g"rc" go r tguc"gp" o gtecf qu" go gti gpvcu'0Guv" r rcp" ug"eqpvk»p" c" eqp"rc" f gekuk»p" f g" Vq{ qvc" f g" kpucrc" tuc" gp" Cti gpvpc" gp" 3; ; 6" { "gu"gn' s wg. "f guf g"rc" ecuc" o cvtk. "o ctec"gn'ugpf gtq" f g"rc" hkn'cn" f gvtgto kpcpf q"uw"gur geknk cek»p" r tqf wekxc. "tqn' f gn' o gtecf q" kpvtqp" cti gpvpc" { "f guk»pqu" f g"gzr qtveek»p0"

Ukp" go deti q. "c" r guct" f g" guc" r qulek»p. "rc" vtc{ gevtk" f g" VCUC" pq" gu^a " o ctecf c" Àpleco gpvgr qt'rc" ecuc" o cvtk { "gnr rcp" KO X. "qo cpf q" wp" tqnr tqwi »pleq"rc" cf o kpxmcek»p" f g" rc" hkn'cn' hqecn" eqo q" ug" xgt^a "gp" gn' r t»zko q" ecr f wmq0Nc" cuki pcek»p" f g" tqrgu" r rcpvge" gn' wpvq" f g" eqo r ctecek»p" { "eqo r gvgpek" f g"rc" hkn'cn' cti gpvpc" eqp"rc" vckrcpf guc" ó { "gp" o gpqt" o gfk c"rc" uwf chtlekpc/"cn'kpvtkqt" f g"rc" gutwewtc" o wmkpcekqpcn' f g" Vq{ qvc" f gdlk q" c"rc" gur geknk cek»p" gp" rc" r tqf week»p" f g" J kwz0Gmq" o cte»" iqu'cnqu'pkxrgu" f g"gzki gpek" gp" iqu' r tqeguqu" r tqf wekxqu" s wg"rc" r rcpv" cti gpvpc" f gdlk»" ewo r rkt" r ctc" pq" cnglctug" f g" iqu' gu^a pf ctgu" iqi tcf qu" gp" Vckrcpf kc. "mq" ewcn'ugt^a " f g" xkn'cn' ko r qtvcpek" r ctc" gpvpc" f g" gn' f gucttqm" f g"rc" hkn'cn' gp" Cti gpvpc" { "rc" tkcrkf cf "r qt'uwu" f guk»pqu" f g"gzr qtveek»p0"

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CAPÍTULO 4

La incrustación nacional de Toyota Argentina y la evolución de su desempeño productivo y comercial

Introducción del capítulo

Gn'r t'gugp'g'ecr ¶wru'v'kpg'eqo q'qdl'g'kx'q'f'guctt'q'm'c't'e»o q'ug'eqph'ki'wt»'r'incrustación nacional f'g'r' h'k'c'n'f'g'V'q'q'c'gp'c'ti'gp'v'k'p'c'r'c'tc'gp'v'g'p'f'g't'e»o q'ug'eqph'q'to »'r'g'u't'c'v'g'i'k'c'f'g'g'u'c'go'r't'g'u'c'gp'r'u'À'ñ'k'o'c'u'f'2'ec'f'c'u'0'R'c't'c'g'm'q'."ug'v'g'p'f't'ª'p'gp'ew'g'p'v'c'm'u'g'ng'o'g'p'v'q'u's'w'g'eqo'r'q'p'g'p'uw'incrustación internacional, m'u'ew'c'ng'u'u'q'p'<'r'g'u't'c'v'g'i'k'c'eq't'r'q't'c'v'k'x'c'f'g'VO'E."gn't'q'n's'w'g'r'ec'uc'o'c'v'k'k'ig'f'k'q'c'g'u'c'h'k'c'n'f'{'r'g'z'r'c'p'u'k'p'gp'o'g't'ec'f'q'u'go'g't'i'g'p'v'g'u'gp'gn'p'w'g'x'q'uki'm'0'R'g't'q'."uki'w'k'g'p'f'q'r'c'f'g'h'k'p'k'p'f'g'O'q't'i'c'p'ª'4'2'3'+f'g'r'u'h'k'c'ng'u'f'g'GO'eqo'q'espacios sociales trasnacionales, m'u'k'p'g'c'o'k'g'p'v'q'u'g'u'c'd'ng'ek'f'q'u'f'g'u'f'g'r'u'q'h'k'p'c'u'eg'p't'c'ng'u'p'q'u'q'p'f'k'g'ev'c'o'g'p'v'g'c'r'k'ec'f'q'u'r'q't'r'u'u'w'd'uk'f'k'c't'k'u'."{c's'w'g'm'u'g'l'g'ew'k'x'q'u's'w'g'r'u'c'f'o'k'p'k'ut'c'p'k'p'v'g't'x'k'g'p'p'gp'r'c'ce'ek'p'f'g'g'u'c'u'go'r't'g'u'c'u'0'G'u'c'u'h'k't'o'c'u'g'u'ª'p'c'v't'c'x'g'u'c'f'c'u'r'q't'm'u'g'u'h'w'g't'q'u'eq'p'v'k'p'w'q'u'f'g'f'k'g't'g'p'v'g'u'i't'w'r'q'u'u'q'ek'c'ng'u'r'c't'c'f'k'ur'w'c't'g'u'c'l'g't'c't's'w'f'c'{'r'u'g'u't'c'v'g'i'k'c'u'c'ug'i'w'k't'ª'O'q't'i'c'p.'4'2'3'9'<'4'0'

" F'g'g'u'g'o'q'f'q'."gp'g'u'c'uge'ek'p'ug'f'g'u'c't't'q'm'c'."gp'r't'k'o'g't'hw'i'c't'."r'g'u't'c'v'g'i'k'c'f'g'VO'E'f'g't'c'f'k'ec'ek'p'gp'Co'²'t'k'ec'f'g'n'U'w'ª'4.'I'+f'g'u'c'ce'ª'p'f'q'u'g'm'u't'q'ng'u's'w'g'D't'c'uk'i'f'c't'i'g'p'v'k'p'c'v'k'g'p'p'gp'r'c't'g'i'k'p'f'{'e»o'q'g'u'q'k'o'r'c'ew'gp'gn'f'g'u'g'o'r'g'o'q'f'g'r'c'h'k'c'n'f'q'ec'c'i'0'N'w'g'i'q'."ug't'g'x'k'uc'gn'r't'q'eg'ug'f'g'k'p'u'c'r'ek'p'f'g'V'q'q'c'gp'c'ti'g'p'v'k'p'c'f'{'m'u'r't'k'o'g't'q'u'c'o'q'u'f'g'r't'q'f'w'ee'k'p'gp'gn'r'c'¶'u'ª'4.'2'+0'G'p'gn'uki'w'k'g'p'v'g'c'r'c't'c'f'q'ug'f'g'u'c't't'q'm'c'ª'eq'q'c'r'h'k'c'n'f'q'ec'c'i'g'k'p'ug't'w'gp'gn'r't'q'g'ev'q'KO'X'."gn'ew'c'n'b'c't'ec'w'p'uc'n'q'ew'c'k'c'v'k'x'q'gp'r'c't'q'f'w'ee'k'p'f'g'r'k'eni'w'r'u'gp'gn'r'c'¶'u'ª'4.'3'+."{'e»o'q'gn'b'k'u'o'q'h'w'g'g'l'g'ew'w'c'f'q'gp'm'u'c'o'q'u'uki'w'k'g'p'v'g'u'."k'o'r'w'u'c'p'f'q'h'w'g't'v'g'o'g'p'v'g'r'c'r't'q'f'w'ee'k'p'f'{'r'u'g'z'r'q't'c'ek'q'p'g'u'f'g'uw'u'x'g'j'¶'ew'ru'ª'4.'4'+0"

U'k'p'go'd'c't'i'q'."c'n'le'q'o'q'ug'r'nc'p'v'g'c't'ª'gp'gn'c'r'c't'c'f'q'u'w'd'uk'i'w'k'g'p'v'g'."c'r'g'u'c't'c'g'u'g'k'o'r'w'u'q'k'p'k'ek'n'r'go'r't'g'u'c'gp't'»'gp'w'p'c'h'c'ug'f'g'g'u'c'p'eco'k'g'p'v'q'c'n'h'k'p'c'n'f'g'r'c'r't'k'o'g't'c'f'2'ec'f'c'f'g'n'uki'm'q's'w'g'eco'd'k'w'ng'i'q'f'g'4'2'3'2'c'r'c't'v't'f'g'r'c'eq'p'ut'w'ee'k'p'f'g'p'w'g'x'c'u'ec'r'c'ek'f'c'f'g'u'i'g't'g'p'ek'c'ng'u'f'f'g'r'u'eq'p'f'k'ek'q'p'g'u'r't'g'x'k'c'u'ª'4.'5'+0'N'q'u't'g'u'w'nc'f'q'u'f'g'g'u'g'r't'q'eg'ug'ug'x'k'g't'q'p'gp'm'u'À'ñ'k'o'q'u'c'o'q'u'f'g'n'r'g't'¶'q'f'q'g'u'w'f'k'c'f'q'."uw'r'g't'c'p'f'q't'²'eq't'f'u'f'g'r't'q'f'w'ee'k'p'f'{'g'z'r'q't'c'ek'q'p'g'u'."eqo'q'ug't'g'x'k'u'»'gp'gn'E'c'r'¶'w'ru'ª'4.'c'r'g'u'c't'f'g'r'c'h'w'g't'g'eq'p't'c'ek'p'f'g'n'b'g't'ec'f'q'c'w'q'o'q'v'q't'c't'i'g'p'v'k'p'q'gp'm'u'c'o'q'u'4'2'3: "{'4'2'3;ª'4.'6'+0"

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4.1 - La estrategia de radicación de Toyota en el Mercosur

Vcr'eqo q'ug'xlq"gp"gr'ecr "wrrq"cpvgtkqt. Co² tlec"Ncvkpc"vkpgg'wpq"fg"rqu'tgi kutqu'o^a u' cpwki wqu"gp"r"j kvqtke"fg"Vq{qvc"gp"o gtecf qu"ht^a pguo'Nc"htc c"lcr qpqvc"fgugo dte»"gp" Dtcukl"gp"3; 7: "eqp"uw'r tko gt"rnp| co kpvq"fg'r tqf week»p"gp"gr'gz vtcp|gtq"*Vq{qvc."4234+0'Gp" gug"co q'ug'eqo gp| »"c"hdtkect"gr'l'ggr "Ncpf"Et wktgt."gr'r tko gt"xgj "pwrq"eqo gtekr'fg"Vq{qvc" rnp| cf q"gp"gr'no gtecf q"dtcukg^o q³⁹³"Cu"r"go r tguv"guwxq"hdtkecpf q"wkktctkqu'r qt"fg² ecf cu" gp"ug'r c"u. r'gtq"uw'gpvtcf c'cn'no gtecf q"eqp"xgj "pwrqu'fg'r cuclgtqu'hwg'o^a u'dl'gp"vctf "p"Eqpuqpk" {"S wcf tqv."4226+0'Gur ge"heco gpvg."gp"3; ; ; . "ewcpf q"eqo gp| »"r"r tqf week»p"fg"gr'Eqtqmc'0' F guf g"3; 7; "j cuvc"3; ; ; : "r"r tqf week»p"fg"xgj "pwrqu'fg"Vq{qvc"Dtcukl"hwg'o w{"dclc."o ctecpf q" wp'r tqo gf kq'fg'40'22'xgj "pwrqu'cn'co q"xgt'I t^a hleq'2/32'fg'gr'Ncpgzq'Guvf "wleq-0'Rqt"qvtq'rcf q." gp"3; : 3"Vq{qvc"vo dl'p"kpke»"r"hdtkelce»p"fg'gr'no qf gr'Ncpf"Et wktgt"gp"Xgpg| wgr"cdclc" guecr"*Vq{qvc."4234+0'

Gp"Cti gpvpc."r"fgelk»p"hp'cn'fg'uw'hpucnke»p"ug'tgo qpvc"3; ; 50'cn'co q'uki wkpvg." gr'Rqf gt'Glgewkxq'fg'r"p'cel»p"cr tqd»"r'tcf kecel»p"fg"Vq{qvc"Cti gpvpc"v'cx² u'fg'gr'F getgvq" : ; 7; 6"*Vq{qvc'I r'qdcn'47'15'13; ; 6+0'Guq'ug'fg"gp"gr'no cteq'fg'gr'gt'qf q'fg'g'zr'cpuk»p'i r'qdcn'fg" VO E"eqp"cr gtwtc"fg"pwxcu"l'f dtkecu"gp"gr'gz vgtkqt"c"r'ctvt"fg'gr'guvpeco kpvq'fg'gr'no gtecf q" lcr qp² u. r'cr tgeke»p"fg'gr'gp."gr'guvknf q'fg'r'et'kuku'geqp»o kec'gp'Lcr »p{"r'ec'ff'c'fg'gr'ndms wg" uqxk'vleq'0'Ugi Ap"rqu'gl'gewkxqu'fg"Vq{qvc"gpvt'g'xk'vcf qu."ru'tc| qpqu'fg'uw'ngi cf c'cn'f c"u'ug" dcucdcp"gp'fg'kwpvqu'hc'vqt'gu."gpvt'g'ru's w'ug'fg'guvcecp<ru'cewgtf qu'eqo gtekr'gu'cwqo q'tlegu" fg'gr'O gtequwt."ru'v'cdcu"c"r"ko r'qt'vcel»p"fg"cwqr'ct'vqu"gp"Dtcukl"r"guvcdk'cf"geqp»o kec" cti gpvpc'fg'wcpvg'r"fg² ecf c'fg'3; ; 2. r'ec'nf cf'fg'r"o cpq'fg'qdtc'cti gpvpc{"r'cegr'vcel»p{" r tq{geke»p"fg'wkkt'cel»p"fg'r"r'leni'wr"J knw"gp"gr'c"u'0'Gp"ug"ugpvk'q'ug'g'zr'tgucdc"Vgvuq" O cuwf c."f'kt'gevt'eqo gtekr'fg"Vq{qvc"Cti gpvpc"v'hp'gu'fg'r"fg² ecf c'fg'3; ; 2."

"

Rctc"hdtkect"r"r'leni'wr"J knw"v'p'fo qu'fg'qr'ek'p'gu<'Dtcukl'q"Cti gpvpc'0'Eqpuk'gt'cpf q"r"guvcdk'cf" geqp»o kec{"r'q'nf'kec{"r'ec'nf cf'fg'r'qu't'gewtuqu'j wo cpqu."Vq{qvc"fg'gek'k"l'px'gt'vt'cs w'0'Gp"Dtcukl'c" v'p'fo qu'vpc'dcug."gp"r"Cti gpvpc"uq'no gpvg'j cd'fo qu'fg'gucttq'ncf q"gr'p'gi qek'fg'r"ko r'qt'vcel»p"eqp" ewvqu."wp'p'gi qek'q'o w'iko kcf q'0'Nc'Ap'lec'qr'ek»p'r'ctc'co r'kt'rt'gtc'tcf'lectug'eqo q'hdtkecpvg'ne'cn'"Nc" P cel»p."6'1; 13; ; ; +0"

"

Ugi Ap"Vuwpvg'ctko c.'r'tgukf gpvg'fg'r'gpv'cf'j cuvc"3; ; ; . "la decisión de radicarse en el país respondió a tres razones: la estabilidad política y económica, con logros muy por

³⁹³ "Ewcpf q'rc'f' dtkec'ug'o w' »"c"U'q'Dgt'pctf q'fg'q'Eco r q. 'Ucp'Rcdm."gp'p'qx'kgo dtg'fg'3; 84. Vq{qvc'tggo r'nc| »"r" r'p'gc" Ncpf "Et wktgt" r'qt' gr'l'ggr "Dcpf g'kt'cpvg." gs w'kr cf q'eqp"wp"o q'qvt'fg'lgugn"v'ceek»p"gp"ru'ew'v'q"twgf cu" {" f'kr'qp'kdr'gp'l'ggr {"'eco k'q'p'vc'fg'ecti c' {"x'gt'uk'p'p'gu'fg'w'v'q'o k'z'v'q'0'

encima del resto de los países de América latina; la calidad de la mano de obra, y el liderazgo argentino en el Mercosur” *Nc” P ceko.p.”49 B4 B; ; : +0” C” uw” xgl .” gr” r t gulf gpv” f g” r” lwpv” f k gevxc” f g” VO E.” Uj qlej ktq” Vq{ qf c.” uquvpp” c” s wg” “Argentina es una pieza clave en nuestra estrategia de globalización. Es nuestra firme intención contribuir al desarrollo de la industria automotriz en el Mercosur y a la economía argentina a través de nuestra radicación” *Nc” P ceko.p.”44 B5 B; ; 9+0⁹⁴”

Gu’f gekl.” r” gzkvpeke” f gnT² i ko gp” Cwqo qtk” gp” Cti gpvpc” {” Dtcukl’ ducuf q” gp” gnCEG” P A’ 36” s wg” r gto kv” c” gn” kvgteco dkq” eqo gtekn’ f g” dkpgu” cwqo qvtegu” eqp” ctpegru” r tghgtpekegru” gvtg” mu” r c” lgu” hwg” wp” hcevt” f gvto kpcv” r cte” r” tcf keceko.p” f g” r” go r tguo” gp” gn’ r c” l” *Nc” P ceko.p.” 5144228+0” C” uw” xgl .” Vq{ qvc” Cti gpvpc” cr tqxgej »” qvc” ugtkg” f g” f kur qulekqpgu” kvukwekqpcgu” pcekqpcgu” f wcpv” mu” r tko gtqu” c° qu” f g” uw” tcf keceko.p” s wg” eqo r tgp” f” r tghgtpekecu” ctpegrtktu” r cte” r” ko r qtveko.p” f g” f kvkvqu” dkpgu.” dpgghleku” hucrgu.” kvgteco dkqu’ eqo r gpucf qu’ f g’ eqo gtekl’ gzvgtkt. hcekl’ cf gu’ gp” mu’ r tqegf ko kvqu’ f g” Cf wpc.” gvtg” qtqu” *xgt” Vcdm” 2/; ” {” I t° hleq” 2/33” f gn’ Cpgzq” Guvcf l’ l’ q-0’ Guqu’ hcevtgu” eqo r qpgp” mu’ kvpekvqu’ guvcrgu’ f g’ r” tcf keceko.p” f g’ r” hto c” lcr qpguc” gp” gn’ r c” l’ 0’

Cf go^a u.” guvc’ r qv” f g’ g’ zrcpuk” p’ f g’ Vq{ qvc” gp” gn’ O gtequw’ ug’ f k’ eqpeqo kvpvo gpv” eqp” wpc” co r rkeko.p’ r tqf vevxc” gp’ Dtcukl’ gp’ 3; ; : r” hto c” kvwi wt» uw’ lugi vpf c’ r rpv” dtcukg° c” gp” gn’ o wplek k’ f g’ kvf ckwdc.” vco dk’ p” gp” gn’ guvcf q’ f g’ Ucp” Rcdm.” r cte” gn’ r tqf vekt” gn’ o qf gm” Eqtqm” *xgt” K’ ci gp” 2/3” f gn’ Cpgzq” Guvcf l’ l’ q-0’⁹⁵” F g” guv” o qf q.” f guf g” uw” kvleku” Vq{ qvc” r rpv» r” gur gekrk’ cekeko.p’ f g’ ecf c’ wpq’ f g’ mu’ r c” lgu’ r tqf vevtgu’ f gn’ O gtequw’ gp” f qu’ kv qu’ f g” dkpgu’ f kvkvqu” J kvz *eco kvpgv” eqo gtekn’ r kvkpc’ r ken’ w’ o gf kvpc+” gp” Cti gpvpc” {” Eqtqm” *xgt’ kvw” f g’ r cuclgtqu’ ug’^a p” o gf kvpq’ f gn’ ugi o gpv” D+” gp” Dtcukl’⁹⁶” Guvc” guvcvgi kv” pq” hwg”

³⁹⁴” Guvc” guvcvgi kv” f g’ zrcpuk” p’ gp” r” tgi kv” ug’ eqo dkp» eqp” qvcu’ gur ge’ kvlecu’ cn’ r tqo qeko.p.” eqo gtekn’ cekeko.p’ {” r quxgvu’ f g’ mu’ xgi kvwqu.” vrgu’ eqo q’ gn’ f guctqm” f g’ wpc” co r rke” tgf” f g’ eqpegukpctkqu’ pwxqu.” wp” ugtxlekl’ gur gekn’ {” f kvgtgpv” f g’ r quxgvu.” gp” gn’ vcn’ ug’ tgcrl’ cdc” wp” o c { qt” ugi vko kvpv” cn’ erkvpgv” eqp” gn’ qdlgvxq” f g’ kvf grk’ ctm’ eqp” r” o ctec.” gn’ r ctkvlekl’ f guf g’ 3; ; : ” cn’ vqtpgq’ f g’ h’ vdn’ uwf co gtecpq.” r” Eqr c” Vq{ qvc” Nkdgtv’ qtgu.” eqp” r” o gv’ f g’ r tqo qekpct’ r” o ctec” Vq{ qvc” gp” wp’ f gr qt v’ cp’ r qr vnt” gp” Uwf co² tlec.” gn’ guvcvgeko kvpv’ f gn’ Rcp” Ecplg’ Egtgru.” s wg’ eqpukv” gp” gn’ ecplg’ f kvgeq’ f g’ r tqf vevu’ r tko ctkqu’ f g’ qtki gp” ci t’ eqm’ r qt’ vevw’ vkg’ xgi kvw” f g’ r” kvpgc” Vq{ qvc.” q’ r” ctvlekl’ cekeko.p’ gp’ f kvkvqu’ gv’ gpv’ u’ gv’ kvkpcf qu’ c’ r” vevxk’ cf” ci tqr gewt’ r” cte” gn’ hqo gpv” f g’ r” Vq{ qvc” J kvz 0’

³⁹⁵” Nc” pvwxc” lf dtlec’ f g’ 372” o kvpgu’ f g’ f » rctgu’ guvdc’ f kvg° cf c’ r” cte’ r” tqf vekt’ kvlekm gpv” 37022” wpl’ cf gu’ r qt” c° q’ f gn’ ug’^a p” Eqtqm” f g’ vco c° q’ o gf kvpq0’ Nvgi q.” gn’ h’ dtlec’ v’ lcr qp² u’ tgcrl’ » kvxgtukvpgu’ cf kvkpcrgu’ f g’ 522” o kvpgu’ f g’ f » rctgu’ gp’ gn’ kvkpcq’ 4222 B3. co r kvpcf q’ r” vcr cekl’ cf” f g’ r tqf vevko.p’ f gn’ Eqtqm” f g’ r” cu’ 37022” wpl’ cf gu’ kvlekvqu’ c’ 67022” r qt’ c° q’ *Ectxvj q.” 4227+0’ Gp’ 4223. Vq{ qvc” cdtk° uw’ kvlekepc’ eqo gtekn’ gp” U q’ Rcwq” {” kvkpcrl’ »” r” r tqf vevko.p’ f gn’ Vq{ qvc” Dcpf kvkpcv” *DL+” s wg’ ug’ h’ dtlec’ dc’ gp” r” wpl’ cf” U q’ Dgtptf q.” r qt’ kv’ vcpv.” guvc’ r rpv” eqo gp” »” c’ r” tqf vekt’ r kv’ cu’ r cte’ r” eco kvpgv” J kvz.” gp” Cti gpvpc.” {” r cte” gn’ Eqtqm.” gp” Dtcukl’

³⁹⁶” Ecdg’ tgvnct” s wg’ kvpi vpv” f g’ guvu’ xgi kvwqu’ gtc’ geqv» o kvq.” r qt’ kv’ vcpv.” gp” uwu’ kvleku’ Vq{ qvc” cr qu»” gp” Co² tlec’ Ncvpc’ c’ wp’ r’ h’ dleq’ f g’ kvpi tguu’ o gf kv’ c’ cn’ qu’ 0’ Gp’ 3; ; : ” Vq{ qvc” vco dk’ p’ r” gv»” gp” r” kvvcrkeko.p’ f g’ qvc” r rpv” gp” Cti gpvpc’ r cte’ r” tqf vekt’ wp’ xgi kvwqu’ r gv’ vq’ q’ r gtq’ kvgi q’ ug’ f guvko” f g’ r” kv’ gc” *Nc” P ceko.p.” 44 B5 B; ; : +0’ Tgekl’ p’ eqo gp’ ct° c” gpvtct’ gp” r” i cpc’ f g’ xgi kvwqu’ r gv’ vq’ qu’ gp’ 4234” eqp” r” h’ dtlec’ cekeko.p’ f gn’ kvkvqu’ gp’ Dtcukl’ 0’ Rqt” qvtq’ kvf q.” j cuvc’ 4223” Vq{ qvc” h’ dtlec’ » gp’ Dtcukl’ wpc’ dcl’ ecv’ kf cf” f g’ Dcpf kvkpcv” 0’

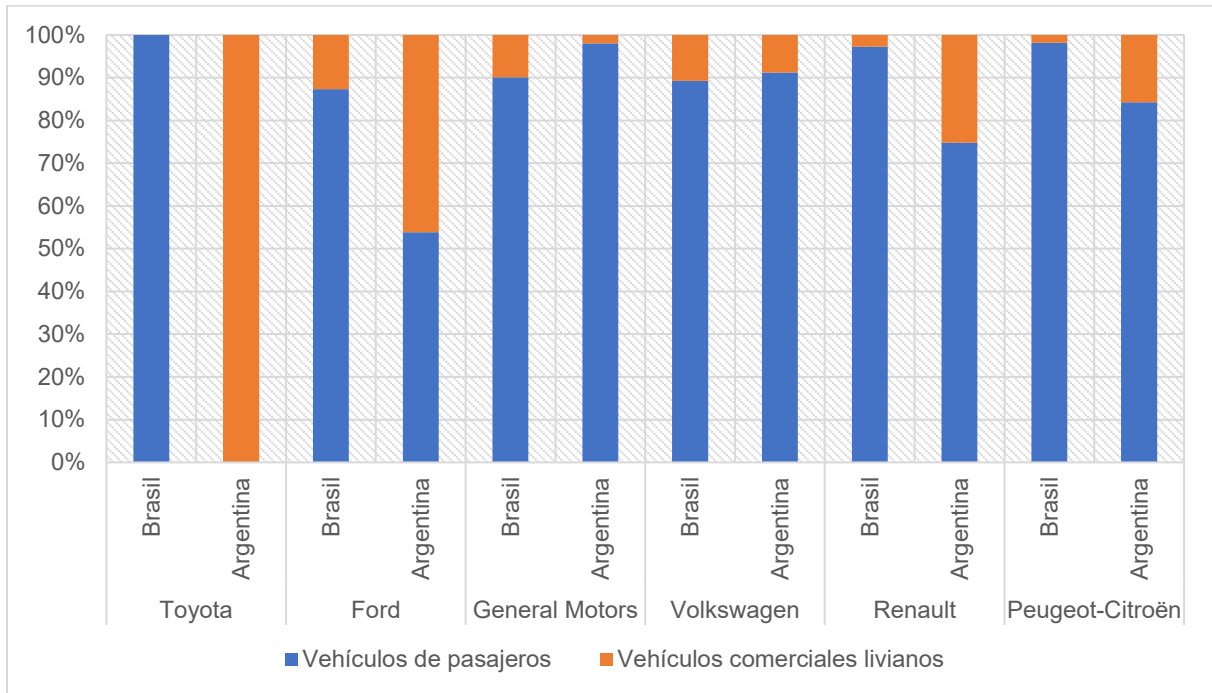
ecuwrkf cf . 'ukpq's wg'hwg'r ctvg'f g'rc'r r pphkecek»p'f g'eqo r ngo gpvctkgf cf "gp'gn'O gtequw'f g'rc" hto c"lcr ppguc." r tqr qplgpq'f wp'pwgqx'o qf grq'f g'pgi qekqu'r ctc"gn'ugevqt"gp'm'tgi k»p"*Nc" P cek»p. "5 14 14228+0⁹⁷"

Uk'dkqp'gp'rc'f²ecf c'f g'3; ; 2'cni wpcu'cwqo qvtlegu'f kxf kgtqp'uwu'o qf grqu'f g'xgj 'f»wqu' f g'r cuclgtqu'gpvtg'o gf kcpqu'*Cti gpvpc+{"ej lequ'*Dtcukn:"Vq{ qvc'hwg'rc'r tko gtc'go r tgu'c's wg' eqo gpl »"c"gur gekrk ct'uw'r tqf week»p'f g'xgj 'f»wqu'r qt'vr q"gp'ecf c"wpq'f g'nu'r tlekr crgu' r c'f»gu'o cpwkewtgtqu'f g'Co²tlec'f gn'Uwt."wpc"vgpf gpek's wg'wgi q"ka'p'f gur ngi cpf q'i tcp" r ctvg'f g'rcu'hto cu"cwqo qvtlegu' *xgt" I t^a hkeq" K6." Vcdr:" K/5" {" Vcdr:" 2/32'f gn' Cpgzq" Guvcf 'f»wleq+0Gp'3; ; 9.'gn'c° q'f g'kpek'f g'r tqf week»p'f g'rcu'r tko gtcu'J knw.'rcu'ectcevt'f»wlecu' f g'rcu'r tlekr crgu'vgtu' kpcrgu'cwqo qvtlegu'gp'gn'O gtequw'gtcp'f kgtucu'Wp'i twr q'eqphqto cf q" r qt'I gpgtcn'O qvqtu.'Hk'v{"Xqmuy ci gp'r qug'f'wpc'co r rkc'i co c'f g'o qf grqu'f g'f kwpvqu'vr qu' f g'xgj 'f»wqu'gp'Cti gpvpc+{"Dtcukn'f wr nkecpf q'rc'r tqf week»p'f g'o qf grqu'gp'co dqu'r c'f»gu'gp' cni wpqu'ecuqu'0Rqt'qvtq'rcf q.'Tgpcwm'eqvcdc'eqp'o c{ qt'r tgu'gpek'gp'Cti gpvpc.'o kgtvcs'wg' gp'Dtcukn'ug'ug'gpeqvtcdc'f wr nkecpf q'gn'o qf grq'O gi cpg'0Ej t { urgt.'r qt'uw'r ctvg.'r qug'f'wpc" dclc'r tqf week»p'f g'eqo gtekrnu'hkcpqu'gp'co dqu'r c'f»gu'0Qvtcu'vgtu' kpcrgu'ug'gpeqvtcdcp'ug'nu' f g'wp'rcf q'f g'rc'htqvgtc.'vrgu'eqo q'Rgwi gqv'*Cti gpvpc+{"J qpf c"*Dtcukn:'r tqf wkgpf q' xgj 'f»wqu'f g'r cuclgtqu'0Cf go^a u.'qvtq'eqplwpv'eqphqto cf q'r qt'Uecpk.'O gtegf gu'Dgpl.'Ci tcrq' {"Xqrxq.'gucdcp'f gf kecf qu'c'rc'r tqf week»p'f g'eco kppgu'{"»o pldwu'gp'co dqu'r c'f»gu'gp'nu' r tko gtcu'f qu'ecuqu.' {"uq'nu'gp'Dtcukn'gp'nu'qvtqu'f qu'*xgt'Vcdr:" 2/32'f gn' Cpgzq' Guvcf 'f»wleq+0"

Gp'r ct'kwrc.'rc'gucv'gi kc'f g'tgr gvt'rc'r r vchqto c'f g'r tqf week»p'{"o qf grq'f g'xgj 'f»wqu' gp'Cti gpvpc+{"Dtcukn'hwg'r gtlw'lekn'r ctc"gn'eqo r rglq'cwqo qvt'cti gpvpc+{"c's wg.'ugi À'gn' r tgu'kf gpv'f g'CHCE'f gu'f g'4236." "es muy difícil competir con Brasil. Lo peor que nos pasó fue cuando se hacía el mismo vehículo en uno y otro país. Cuando caía la producción en Brasil, dejábamos de producir en Argentina, y eso para los proveedores es letal" *r tgu'kf gpv'f g' CHCE." gpvtg'xkrc" r gtuqpcn" 32 18 14244+0' F g' guv' o qf q." dclq' f lej q' gus wgo c." Cti gpvpc' hcdtlecdc'r tlekr cm gpv'ewcpf q'rcu'r r pvcu'f g'Dtcukn'crecp| cdc'p'uwu'f»o kgu'f g'r tqf week»p⁹⁸"

³⁹⁷"C'uw'xgl . 'gp'3; ; : "Vq{ qvc'eqo gpl »"c"gpuc' drc'gn'o qf grq'Eqqtnc'gp'Xgpgl wrc'0
³⁹⁸" Rtlekr cm gpv'."rcu' cwqo qvtlegu' ug' kpu'rcdcp' r ctc" cr tqxgej ct" gn' T²i ko gp' Cwqo qvtk' s wg' r gto k'c' eqo gtekrk ct'eqp'ctcpegru'r tghgtgpekrgu'gpvtg'Cti gpvpc+{"Dtcukn'vcpv'xgj 'f»wqu'eqo q'cwqr ctv'u.'r gtc'rcu' g'zr qt'vckppgu'gz'vc/dn's wg'gtcp'dclcu'0F g'gung'o qf q.'rcu'g'zr qt'vckppgu'cti gpvpcu'gucdcp'o c{ qto gpv'cr wpc'cu' j cek'gn'i tcp'o gtecf q'kpvtpq'f gn'r c'f'u'xgelpq'0

Gráfico IV-1 - Especialización productiva de automotrices seleccionadas en el segmento de vehículos livianos para las filiales de Argentina y Brasil (año 2002)



Hvpgv<grndtckep'r tqr kc'gp'dcug'c'CF GHC'{'CP HCXGC0'

GriÀpleq'ecuq's wg'r nrvpvcde'wpc'gumcvgi kc'o a u'uko knt'c'Vq{ qvc'c'hpgu'f g'rc'f² ecf c'f g' 3; ; 2'gtc'Hqtf .s wg'gp'3; ; 7'ug'j cd'c'ugr ctf q'f g'Xqmy ci gp.'f cpf q'hp'c'CWqrwpc.'{'gp' f kkg dtg'f g'3; ; 8'j cd'c'eqo gp| cf q'c'r tqf wek'rc'r len'wr 'o gf kpc'Hqtf 'Tcpi gt'gp'Cti gpwpc' r qt'wp'vqcnf g'522'wpl cf gu0Gp'3; ; 8'Hqtf 'Cti gpwpc'f kucpwpw'uw'o qf gmq'Qtkq.'Rqkvt' I N.'H/322.'H/372'{'H/622'{'eqpugt'gn'xgj 'fwm'f g'r cuclgtqu'Gueqv's wg'f gl'»'f g'r tqf wek'gp' Dtcuk'Ukp'go dci q.'rc'gur gekrk' celap'r tqf wekxc'f g'Hqtf'{'Vq{ qvc'gp'Cti gpwpc'gp'3; ; 9'gtc' o ctef co gpw'f hgt gpw.'{ c's wg'rc'go r tgu'pqtvcg gtepc'f gukpcdc'gn'; 3' 'f g'uw'r tqf week'p' cn'o qf gmq'Gueqv'*. 90/68'wpl cf gu'{'uq'wp'; ' 'c'rc'r len'wr 'Tcpi gt'*. 0 57'wpl cf gu-0C'uw' xgl .Hqtf 'Dtcuk'r qug'c'wpc'co r nc'xctkgf cf 'f g'o qf gmq'f g'f kwpqu'kr qu'f g'xgj 'fwm'{'wpc' hwgtv'ecr cekf cf 'f g'r tqf week'p.'vkr nccpf q'c'rc'cti gpwpc'gp'f lej q'c'° q0⁹⁹'F g'gug'o qf q.'rc' Àplec' vgtó kpcil's wg' r tqr wuq' wpc' gur gekrk' celap' gp' xgj 'fwm'f g' r cuclgtqu' gp' Dtcukr' { ' eqo gtekn'g'rkcpqu'gp'Cti gpwpc'eqp'wp'o qf gmq'f g'ecf c'kr q'hwg'Vq{ qvc0'

Cn'tgur gevq.'F cplgn'J gttgtq.'r tgu'f gpw'f g'VCUC'f guf g'4232'j cuc'4244'uqvkpgp's wg.'

³⁹⁹"Qvcu'r len'wr u's wg'ug'r tqf we'cp'gp'gug'o qo gpv'gp'Cti gpwpc'gtcp'rc'r len'wr 'i tcpf g'Ej gxtqrv'Ukxgtcf q' *3; ; 9/4223+{'rc'xgtuk'p'r len'wr 'f gr'gzkquq'o qf gmq'f g'rc'f² ecf c'f g'3; ; 2'Rgwi gqv'726'*3; ; 5/3; ; : 40'

Nc'i tcp"fhgtgpek's wg'wxq"Vq{ qvc"gp"gu'g'o qo gpvq"eqpvc"gn'tguvq'f g'rcu'vgt'o kpcrgu'gu's wg'pquvtqu'pq" vgp"fo qu'r rwxhcto cu'f wr rkecf cu'Vgp"fo qu'r rwxhcto cu' gzenwukxcu'P quvtqu"hdtkle^a dco qu'xgj "fwaru" eqo gtekrnu{"Dtcukl'xgj "fwaru" f'g'r cuclgtqu'Gpvpegu'pq'j cd"p"wp"qr ekp" f'g'hdtkleq"ce^a "q'cmf . 'ukpq's wg' gtc"wp"qr ekp" f'g'eqo r ngo gpwckp"tgi kqpcr'eqp"m'ewcn'dclcdcu'wp'r qeq"gn'tkgui q'f g'r tqf weekp" *F cplgn' J gttgtq."gpvtxkuc'r gtuqpcn"3 19 14244+0"

"

Nc'r t guppek'f g'rc'r keni'wr "J knwz gp"Cti gpvpc"j cd"p"eqo gpl cf q'c'ugt'uki pkkckvc"gp" rc" f²ecf c'f g'3; 92."ewcpf q'rc'cr gtwtc"ko r qtwcf qtc"ko r ngo gpwcf c'r qt"gn'o kpkvtq'f g'rc"Anko c" f kvcf wtc"o kkkct."Lqu² "Crtf g'q"O ct"vpgl "f g'J qj ."r gto kkk"rc"o c{qt"ko r qtwek"p" f'g' guvqu" xgj "fwaru" Gpvtg"3; 9; {"3; : 4"rc'r keni'wr "J knwz" {"rc"ewr² "Egrkcc"ug"j cd"p"eqpvtkf q"gp"mqu" o qf gmq'u^a u'gzkququ'f g'rc'b ctecOC'r guct'f grnkgtt'g'b cukxq'f g'rc'ko r qtwek"p"gp"3; : 4."cri wpcu" J knwz'ug'uki wktqp"ko r qtvcpf q'j cuvc"b gf kcf qu'f g'mqu" c^o qu": 2" *Cwqj kvqtkc."4242+0" Gung'vr q" f g'xgj "fwaru" vepg"wp"rc'ti c"j kvqtkc" gp" gn'r c"u."f gpvtq'f g'mqu" ewcrgu" uqdtgucrk" gn'o qf gmq" Tcutqlgtq."hdtklecf q'r qt" KO GIKO G'f guf g'3; 74"j cuvc"3; : 2³⁹: " *Rkcdgc" {"Vj qo cu."4233= Rkcdgc."4239+0⁹; "Ukp" go dci q."rc"o c{qt"p" f'g'mqu" o qf gmq'f g'r keni'wr u'ug'f kveqpvkpwctq"p" c" kpkcku'f g'3; : 2"eqp"rc"gzegr ekp" f'g'rc" Hqtf "H/322³: 2" s wg."uwo cf q'cn'ekgtt'f g'KO G."uki pkkc" s wg'rc" go r t guc'pqt vgo gtekcpc"eqpugt xctc"gn'o qpqr qrkq'f g'rc'r tqf weekp" f'g'xgj "fwaru" r keni'wr " j cuvc"b gf kcf qu'f g'rc" f²ecf c'f g'3; ; 2" *Rkcdgc."4239+0"

F g'gug'o qf q."rc" kpugetekp" f'g'Vq{ qvc"gp"gn'ugi o gpvq'f g'mqu" xgj "fwaru" eqo gtekrnu" rkkcpqu'hwg'f g'gur gekn'tgrxcpek'r ctc"rc" go r t guc'Ugi Ap"gn'EGQ'f g'Vq{ qvc"Co² tlec"Ncvkpc" f guf g'423; ."O cucj ktq" Kpqwg." *“la pick up tamaño mediano no existía en Latinoamérica. Solamente se producían las grandes y Toyota comenzó a exportar de Japón para Latinoamérica la Hilux. El volumen era muy pequeño, pero comenzaron a tener éxito en Chile, Perú, Argentina y Brasil. Ahí decidimos invertir dinero y producir en Argentina”* *Dmqo dgti " N"pgc."45 15 14244+0" C"uw" xgj ."mqu" f ktevkxqu"ug^o cmcdcp" s wg"rc" ugrgek"p" f'g'f lej q'r tqf wevq" vco dk² p'ug'f gd"p" c"uw'wuq"gz vgpf kf q'gp"rcu'f kulpvcu'cevkxf cf gu'r tko ctku."vrgu'eqo q'gn'ugevqt" ci tqr gewctkq."gn'gpgti² vkeq" *oil & gas" {"rc"b kpgt"p."r tgr qpf gtcpvgu'gp"rc" gut wewtc"geqp" o lec" f'g' Cti gpvpc" {"Co² tlec"Ncvkpc' Gung" hcevt" hwg" wpc" f'g'rcu" ecwcu" f gvgto kpcpvgu" gp" gn' etgelo kpvq'f g'rc" hko c"gp"rcu'r t»zko cu'f²ecf cu'OC'f go^a u."ug"uwo cdcpc" guxu'tc| qpgu rc"o crc"

³⁹: "Gn'Tcutqlgtq'g'c'gur gekm gpv'r qr wct"gpvgr'gs wg^o qu'r tqf wevqtgu."mqu" s wg'pq'r qf "p"eqo r tct'wp" Hqtf "q'wp" Ej gxtqrgv" *Rkcdgc" {"Vj qo cu."4233<65+0"

³⁹: "Qvtqu" o qf gmq'f g'r keni'wr u'f g'tgrvkvq"z ksq'f wcpvg'guvqu" c^o qu'hwgtqp<f g'KMC."Lggr "KMC" *3; 78+."Dcs wcpq" *3; 79+ {"I rcf kvqt"Z" *3; 85+ f'g'Uko "Fk'Vgmc."Cti gpvc" *3; 83" {"3; 85+ f'g'Hkv."3722"O wnkcti c" *3; 87+ {" 3822 B47'O wnkcti c" *3; 94+ f'g'Hqtf."H/322" *3; 7; + {"Tcpej gtq" *3; 95+ f'g'Rgwi gqv."626" *3; 95+0"

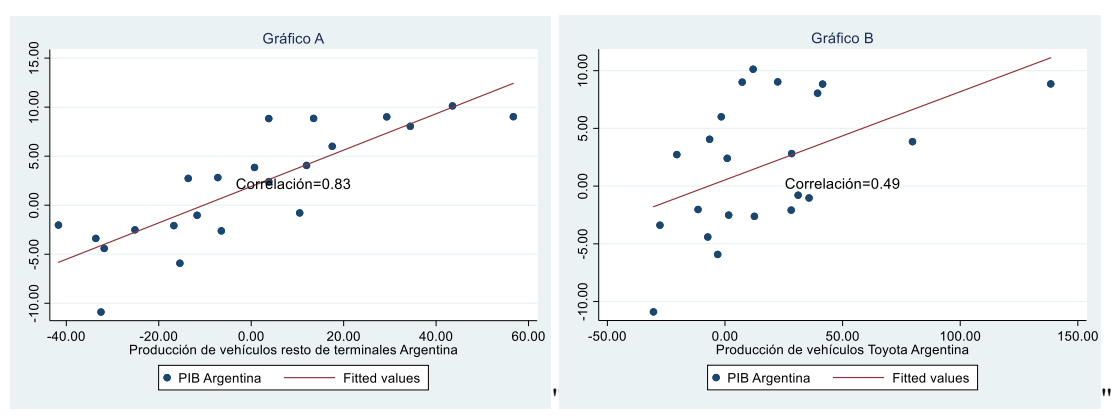
³: 2" Gung'xgj "fwaru" wxq'cewcrk cekqpgu'gp"3; 94" {"3; : 3"gp"Cti gpvpc."j cuvc" s wg'gp"3; ; : "eqo gpl »"c'ugt'r tqf wekf c" gp"Dtcukl'

ecrkf cf "f g"rcu"twcu"{"gn'vgttgpq"o qpvc quq"fg"i tcp"r ctvg"fg"rc"tgi ksp"eqo q"qvcu"tgrxcpvgu" rctc"rc"grgeekp0"

Vcn'eqo q"ug° cnc"Hi g{ uugpgv"3; ; : +cni'cpcrk ct"guvc"tcf kecekp."Vq{ qvc"grki k" f guf g"uw" kplekq"wp"ugi o gpvq"fg"o gtecf q"s wg"uko wn² pgco gpvg"r qugg"cnqu"r tgekqu."gu"tgo wpgtcvxxq"{" wpgp"o gpqtgu"r qudkrkf cf gu" f g" f kuo kpwekp" gp" ecuq" f g" wp" eco dkq" gp" rcu" eqpf lekqpgu" geqp»o kecu."qvcu"ectcevgt"kecu"erxgu"r ctc"gn'f gucttqm"fg"rc"hn'cn'gp"rcu"f² ecf cu"uki wkgpvgu" *xgt" I tª hequ"K/4"{"K/5+0Gp" gug'ugpvkf q"ug"gzr tgucdc"Vgwuq"O cvwf c."f kgevt'eqo gtekrif g" Vq{ qvc" Cti gpvpq" c" hkgu"fg"rc" f² ecf c" f g"3; ; 2."ug° cnc'pf q"s wg" "el segmento de pick ups compactas era muy atractivo" "Nc" P cekp."61; 13; ; ; +0

Ghgevxco gpvg."cpcrk cpf q"rc"eqttgrcekp"gpvtg"rc"r tqf weekp"fg"xgj "ewqu"fg"Vq{ qvc" Cti gpvpq"{"gn'tguvq"fg"rcu"vgo kpcrgu"tcf kecf cu"gp"gn'rc"u"eqp"rcu"xctkekqpgu"fg"RKD"gp" Cti gpvpq"{"gn'tguvq"fg"Co ² tlec" Ncvpc" *gzege wcpf q"O ² zleq+"ug"r wfg g" qdugt xct" s wg"uw" cuqekcekp" gu"uki pkecvxco gpvg"o gpqt" s wg"gn'tguvq"fg"rcu"go r tguu"gp" co dqu"ecuqu" *xgt" I tª hequ"K/4"{"K/5+0F g'hqto c'uko kct."guvc" f kª o kec"ug"r wfg g"xgt"gp"rcu"xgpvcu"fg"xgj "ewqu" fg"Vq{ qvc"gp"gn'lo gtecf q"cti gpvpq" *xgt" I tª hequ"2/35."2/36"{"2/37"fg"nCpgzq"Guvcf "keq+0

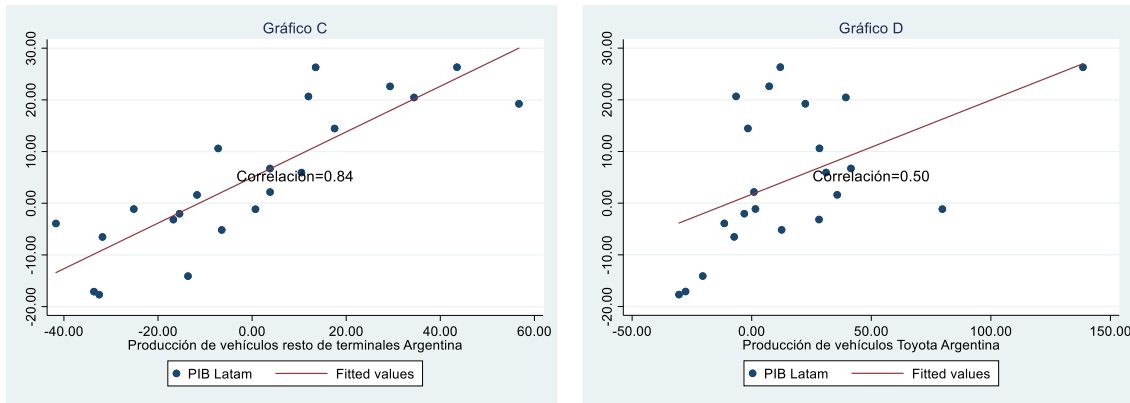
Gráfico IV-2 - Correlaciones entre la variación del PIB de Argentina y la producción de vehículos de todas las empresas excepto Toyota (A) y sólo Toyota (B) (1998-2019)*



Hwpgv<grdqtkcekp"r tqr kc"gp"dcug"c" f cvqu"fg"Dcpeq"O wpf kcn"WP E VCF"{"CF GHC"0" , Rctc"co r nct"xgt" P qc"O gwqf qn»i kec"7"fg"nCpgzq0

"

Gráfico IV-3 - Correlaciones entre la variación del PIB de América Latina (excepto México) y la producción de vehículos de todas las empresas excepto Toyota (C) y sólo Toyota (D) (1998-2019)*



Hvpgv<grndqtce>p'r tqr kc'gp'dcug'c'f cvqu'f g'Dcpeq'O wpf kcn'WP E VCF '{ 'CF GHC'0
, Rctc'co r rkt'xgt'P qvc'O gwqf qn>i kec'7'f gn'CPgzq0'

Gp" r tko gt" nwi ct." guv" ug" gzr rlec" r qts wg." f gdfk q" c" uuu" ectcevtg" f" luecu" f g" xgj " fwaq" wlkxktkq." r" f go cpf c" f g" r" Vq{ qvc" J knwz" guwxq" cvf c" c" ugevqtgu" geqp>>o lequ" o w{ " f kp" a o lequ" gp" r" tgi k>p" f wcpvg" gn'r gt" qf q. "vcrgu" eqo q" r" ci tlewwtc." gn'r gt>rgq." gn'i cu" { " r" o kpgt" f" "xgt" I t" a heq" 2/34" f gn'CPgzq" Guvcf " lueq+0C" n't gur gevq." F cpkgn'J gttgtq" uquvkgpg" "elegimos fabricar vehículos comerciales en un momento en que Latinoamérica tenía boom de minería y soja (...)
Es parte de lo que es el proyecto. Sabíamos que un vehículo comercial era más inelástico en términos de demanda y eso nos daba sustentabilidad" "Gn'F kctkq" CT." 7 18 14243+0C" f go " a u." vcpvq" r" J knwz" eqo q" r" UY 6" uqp" xgj " fwaqu" s wg" ug" gpewgpvtcp" r qt" gpeko c" f gn'r tqo gf kq" gp" gn'tcpi q" f g" r tgekqu" f gn'o gtecf q" m'ecn" m' ewcn' wco dkz p" eqvtdkw{ >>" c" s wg" guv? p" o gpqu" chgevcf qu" c" mqu" xckxgpgu" geqp>>o lequ." cn' eqvtdctkq" f g" m' s wg" uwegf k>" eqp" mqu" xgj " fwaqu" o " a u" r gs wgo qu" { " geqp>>o lequ" *xgt" Vcd r" 2/33" f gn'CPgzq" Guvcf " lueq+0C" " uw" xgl . " guvg" et geko kgpvq" uquvplk q" guwxq" gp" h'fpgc" eqp" mqu' r tkpek r ku' f g' production smoothing" f gn'VRU" xkuq" gp" gn'ecr " fwaq" cpvgtkqt." c" r ct vt" f gn'ewcn'ug" r tqewt" uwcxk k ct" mqu" eco dkqu" gp" mqu' plxgrgu' f g' r tqf week>p0'

F g" guvg" o qf q. " gp" r" o kuo c" tcf kecel>p" f g" Vq{ qvc" gp" gn' O gtequwt" { c" ug" gpewgpvtcp" cni wpcu' f g' hu' encxgu' s wg" o ctect" a p' r ctvg' f g' uw' t c { gevqt k' r quvgtkqt0Gp' r tko gt" hwi ct. " ug' f guxec" wpc" r kqpgtc" gutcvgi kc" f g" gur gekr k k cel>p" r tqf vewxc" gp" ecf c" wpq" f g" mqu" r c" fugu" r tqf wevqtgu' f g" xgj " fwaqu" f g" r" tgi k>p." c" r ct vt" f g" r" ewcn' Cti gpvpc" ewo r r k>" gn' tqn' f g' hcdtlecpvg" f g" xgj " fwaqu" eqo gtekcrgu" r kxkcpqu0Guq" r gto kkt" a s wg" r" h'kn' cti gpvpc" pq" hwpkqpg" Apkeco gpvg" eqo q" wp" cr? 2 pf keg" f g' r u' dtcu' r go cu0Gp' r ct vewt. " r" r tqf week>p" f g" r" r keni' w' J knwz" hwg" gngi kf c" r qt" r" j kqvtk" f g' guvg" v' r q' f g" xgj " fwaqu" gp" gn'r c" f u. { " r" cr wguv" c" uw' w' k k cel>p" gp" r" ce v' k k f c' f r tko ct k c"

f g'rc'tgi k»p."qtc'f g'rc'u'ercxgu's wg'b ctect^a "gnf gucttqm'f g'hqu'r t»zko qu'c° qu0Gnif guceqr ng'f g'rc' r tqf week»p'f g'VCUC'f g'hqu'xckxgpgu'geqp»o lequ'f g'Cti gpvkpc" { "f g'rc'tgi k»p'gu'qvtq'f g'hqu' hcevtgu'f gvto kpcpvgu'f g'uw'f gugo r g° q'r quvgtkt. "cuqekcf qu'cni'tqnlkplekcn'f g'rc'uwdukf kctk'gp' gn'r c¶u" { "rc'tgi k»p0"

4.2 - La instalación de Toyota en Argentina (1994-2001)

Gn'r tqegf ko kgpvq'f g'kpuvrcck»p'f g'rc'go r tguc'tgur qpf k»c"v° epkecu" { c'cr rkecf cu'r qt'rc" o cvtk "f g'rc' hto c" gp"o gtecf qu'gp"mu'ewcngu"pq"vkgpg"eqpqeko kgpvqu'f g'qr gtcek»p0'Guc" o gvxf qmji ¶c"eqpukv¶c"gp'rc'cuqekck»p"x¶c joint venture eqp"vpc'hto c'hqecni"xgt"Vcdm"KKK5+0' Gp'Cti gpvkpc"guvgr tqeguq'ug'tgcrk »c"vtx²u'f g'rc'cuqekck»p'eqp'rc'hto c'hqecni'F gectqrk'UCC0" go r tguc" f g'rc"mecn'cf "f g'Tquctkq"eqp"rti c"vc { gevqtk"gp"gn'o gtecf q" { "f g'f kcf c" c"rc" hcdtkeck»p'f g'ej cuku'r ctc"o letqu'f g'rti c'f kuvpekc0'Nc"ectcevt¶vlec"f g'guc'hto c'gtc"s wg" r qf ¶c" vcpuo kktng"mu"e»f ki qu" { "ug° cngu" f gn'o gtecf q"mecn" { "eqvtdvkt" c"s wg"² uxc" mu" f geqf khs wg"°P qxkemi'gv'cni0'4224+0Cf go ^a u."guc'go r tguc'r qug¶c'wp'cevqxq'o w { "lo r qtvcpg'r ctc" Vq { qv"gp"vug'o qo gpvq."rc'hkgepek'r ctc'hvpekqpc't'eqo q'vto kpcn'cwqo qvkt 0'Vcni'eqo q'ug° cnc" gn'r tgukf gpv'f g'CHCE" "el socio local fabricaba chasis para micros de larga distancia. Y acá era difícilísimo que la Secretaría de Industria te de una licencia para fabricar vehículos. Y Toyota se asocia con ellos por eso" *r tgukf gpv'f g'CHCE."gpvtgxkuc'r gtuqpcn'32 18 14244+0Cu¶" co dcu'go r tguc'eqvcdcp'eqp'gn'72' "f gn'r cs wvg'ceekqpc'kq'f g'Vq { qv"Cti gpvkpc"Uqelgf cf " Cp»plo c's wg'cncp|cdc'mu'w&u322"o kmppgu0F g'gug'o qf q."mu'lcr qpgugu'cr qtvcpc'gn'know-how" { "rc"vgepqmji ¶c."o kgpvtcu's wg'rc'go r tguc"cti gpvkpc"r tqr qtekqpcdc"gn'eqpqeko kgpv'f gn' o gtecf q'mecn'°Dcvkukpk'4223+0³"

Gp"3; ; 9"VO E"vqo »"gn'eqvtqnl'vqcn'f g'rc'eqo r c° ¶c"qdvpgkpf q'gn'; ; ; ; ' "f g'rc'u" ceekqpgu" { "f glc'p'f q" c"Vq { qv" F q'Dtcukr'eqo q'wp'o kqtkctkq'ugi w'p'f q'ceekqpkuc'eqp'gn'2.23' " f gn'r cs wvg'0'Ugi Àp"Cp¶dcn'Dqtf gtgu."f kt gevqt'f g'TTJ J "f g'f g"3; ; 7" { "r tgukf gpv'f g'Vq { qv" Cti gpvkpc"gpvtg'4228" { "4232."mu'ceekqpkuc'lcr qpgugu" { c'ucd¶cp's wg'rc'cncp| c'eqp'gn'ecr kcn' mecn'ugt¶c" vgo r qtctk" r ctc"nwg' q"vqo ct"rc"vqcrkf cf "f gn'eqvtqnl'f g'rc'eqo r c° ¶c" °Cp¶dcn' Dqtf gtgu."gpvtgxkuc'r gtuqpcn'39 16 14243+0F g'gug'o qf q."VCUC"ug"uwo »"c"rcu'go r tguc" { c" gzkvpgv'f gn'I twr q"Vq { qv"gp" Cti gpvkpc."Vq { qv" Vuwj q."uwdukf kctk" f g'Vq { qv" Vuwj q"

^{3:3} "F g'gug'o qf q."Cnigtv'Hgtp^a pf gl ."tgr tguvcpv'f g'F gectqrk'r tgukf g'Vq { qv"j cuvc"3; ; 8."ewcpf q'gn'lcr qp²u' Vuwpqg"Ctlo c"cuwo g'rc'r tgukf gpekc0'Nwgi q."Cnigtv'Hgtp^a pf gl "o cpvkpg'gn'ecti q'f g'f kt gevqt'vkwrt'f g'VCUC" ulgp'f q'gn'Àpleq'cti gpvkpc"gp'gn'f kt gevqt'kq'j cuvc"4223"ewcpf q'gn'f kt gevqt'kq'eqo kgp| c" c"guvct"eqphqto cf q'r qt" ekw'cf cpqu'lcr qpgugu'gp'uw'vqcrkf cf 0'Nwgi q."gp'4227'qu'cti gpvkqu'f g'VCUC"l'vcp'Dvlp'eqo q'f kt gevqt'vkwrt" { " Cp¶dcn'Dqtf gtgu'eqo q'f kt gevqt'uw'rgpv'xgt"Vcdm'2/34'f gn'CPgzq'Gucf ¶vlec+0"

Eqtr qtcevqp."{ "F gnuq"O cpwlcwtkpi "Cti gpwpc."uwduf kctk"f g"F gnuq"Eqtr qtcevqp"*xgt"Vcdrc"
 KX/3"{"Vcdrc"KX/3-0:4"

"

Tabla IV-1 - Empresas del Grupo Toyota en Argentina

Empresa	Inicio	Actividad
Toyota Tsusho	1982	Servicios de gestión y logística para el transporte de mercaderías. A partir de 2010 comienza la explotación de litio en Jujuy en asociación con Orocobre y JEMSE.
Toyota Argentina	1994	Fabricación de vehículos automotores.
Denso Manufacturing Argentina	1996	Fabricación de calefactores, condensador de aire acondicionado, depósitos de líquido refrigerante, piezas plásticas, radiadores, radiadores de calefacción, sistemas de climatización y sus componentes, tubos de aluminio para alta presión.
Toyota Credit	1998	Servicios de financiación y actividades financieras. Incluye actividades de inversión en acciones, títulos, la actividad de corredores de bolsa, securitización, mutuales financieras, etc. No incluye actividades financieras relacionadas con el otorgamiento de créditos.
Toyota Boshoku	2003	Fabricación de asientos, paneles de puertas.
Toyota Compañía Financiera de Argentina	2004	Servicios de intermediación financiera realizada por las compañías financieras. Incluye actividades financieras relacionadas con el otorgamiento de créditos.
Toyota Material Handling Mercosur	2004	Comercialización, posventa y alquiler de autoelevadores Toyota.
Toyota Transport Furlong Argentina	2013	Servicio de transporte automotor de cargas.
Toyota Plan Argentina S.A. de Ahorro para Fines Determinados	2014	Servicios de gestión de fondos a cambio de una retribución. Toyota Argentina posee el 95% de la participación de su capital.
Hino Motors Sales Argentina	2016	Venta de vehículos automotores nuevos.

Hwpgvz-grdqtcelp"r tqr kc"gp"dcug"c"Dqrgv"p"Qhlekcn"Dcrpegu"{"P quku0

"

F wcpvg"gnr tqeguq"f g"tcf kecek»p"gp"gnr c"ju"nc"hto c"gpeqpt»"qduv ewqu"gp"gnr rcpq"
 ukpf lecn"r qt"m"ewcn"f gdl»"cdcpf qpct"nc"kf gc"f g"eqpvt"eqp"wp"ukpf kecq"r tqr kq"*cn"eqo q"
 uwgf "c"gp"Lcr »p+r ctc"pgi qekct"eqp"tgr tguvpcekppgu"i tgo krgu"c"pkxgnf g"nc"cevkxf cf"q"nc"
 tco c"*Dcwukpk"4223+0Cu"{"VCUC"f gekf k»"vcdclct"eqp"gn"Ukpf kecq"f g"O geª plequ"{"Chkpgu"

^{3:4} "Gp"3; ; : "ug" cº cf g" wo dR p" qvc" hto c" f gn i tw q." Vq{ qvc" Etgf kv" f gf kecf c" c" ugtxlekqu" f g" hpcpekelep" { " cevkxf cf gu" hpcpekgcu0Nwgi q." gp"3; ; ; ." Vq{ qvc" chcp| »" uw'r tq{ gevq" gp" Cti gpwpc" cn" kpcwi wtct" nc" F kxkx" p" f g" Gs wlr qu" kpf wutkrgu. " kpgt vº pf qug" gp" gn' o gtecf q" f g" cwqrgx cf qt gu0' Guc" f kxkx" p" crecp| »" gn' rlf gtc| i q" f gn' o gtecf q" { " gp"4226'r cu»" c" ugt" wpc" go r tgu" kpf gr gpf kpgv" f gpqo kpcf c" Vq{ qvc" O cvgtkcnJ cpf rkp i " O gtequw0Gp" mqu" cº qu' r qugtkqtgu" ug" uwo ctª p" qvcu" eqo r cº " cu" cnf tw q" *xgt" Vcdrc" KX/3-0

f gn'Vtcur qtvg'CWqo qvqt *UO CVC+ '{ c's wg'2 uvg'gucdc'cdlgtvq'c'rc'pqi qekcekp'f'g'eqpxgpkqu' r qt'go r t guc.'cekwf's wg'pq'r t gupvdc'rc'Wpkp'Qdtgtc'O gcn'Ati kec *WQO +0: 5'''

C'pkxgn'i nqden "Vq { qv'kpvvdc'gucdrggt'eqvtcvqu'kpf kxkf wcrqu'gp'iqu's wg'r cevdc' nqu'eqo r tqo kuqu'o wvqu'gp'tgrcekp'eqp'gn'VRU"*eqo r tqo kuq'f'g'gucdkkf cf.'f'g'wp'rcf q.'g' ko r rcecekp' gp' v'2 to kpqu'f'g' r tqf weekp' { "ecrkf cf." r qt' qvtq+0' Gp' gn'ecuq' cti gpvkvq." guqu' eqo r tqo kuqu'dcuf qu'gp'gn'VRU'ug'j cd'fcp'xqrecf q'gp'cni wpqu'f'g'iqu'r tkpek kqu'r t gupvqu'gp'gn' eqpxgpkq'eqrgevxxq.'iq's wg'iki pkkccdc's wg'rc'hkquqhf'Vq { qv'qewr cdc'rcu'r tko gtcuf kgl' i' a' i' kpcu' f'gn'eqpxgpkq." { "cwps wg'vpp'cp'o gtq'ect' a' evgt'f'gerctvxxq.'uqp'iqu'r tkpek kqu'kpuvkw' gpvqu'f'gn' o qf gmq'mdqtcn' { "r tqf wevxxq" *P qxlent'gv'cni'4224+0'Ugi Ap'F kgi q'Rtcf q.'f'ktgevqt'f'g'Cuwpvqu' Eqtr qtcvxxqu'f'g'Vq { qv'Cti gpvkvq."'''

"

UO CVC'vqo »'gn'i wcpvg' { 'pqi qek'wp'eqpxgpkq'eqrgevxxq'f'g'vcdclq's wg'hwg'o w' kppqxcft'q's wg'ug'htk'o »' gp'gn': 80Nc'kppqxcelp'ug'r r uo »'gp'o wej cu'r cwcu.'tghrglcdc'vqf qu'iqu'r tkpek kqu'f'gn'VRU' { 'f'gn'Vq { qv' Y c { -Eqo r tqo kuq'f'g'vcdclq'c'rc' q'r r' q.'pq'f'gur kf qu.'s wg'uqp'iqu'r tkpek kqu's wg'vkgp'rc'eqo r c' °'f'c' r' ctc' qhtgegt.'r'gtq'vco dkr'p'tghrglc'vqf q'iq's wg'rc'eqo r c' °'f'rc'kf'g'c'iqu'vcdclcf qtgu'Guv'gu'gn'eqo r tqo kuq' { " rc'hgzdkkf cf'0'Guv'Anko q'gu'iq' o' a' u'cv'f'leq'gp'gug'eqpxgpkq'eqrgevxxq'0'Gvqpegu'wpq'f'g'iqu'r krc'gu'f'gn' eqpxgpkq'eqrgevxxq'pwgvtq'gu'rc'r qrxcrgepek'hvpekpcn's wg'ug'qr qpg'c'rc'ectcevt'f'vkec'pqto cni'f'g'iqu' eqpxgpkq'eqrgevxxqu'f'g'rc'Cti gpvkvq's wg'gu'rc'gur gekrk' celp' *i' +Cf go' a' u.'iq's wg'j' go qu'ceqtf cf q.'s wg' gu'eqo Ap'gp'vqf cu'rcu'r r pvcu'f'g'Vq { qv.'gu'wp'ukvgo c'f'g'ltqpcf c'cpwcn'f'qpf g'rc'r'gtuqpc'pqu'f'c'gn'uwvqv' f'g'wp'ukvgo c's wg'mco co qu'dcpeq'f'g'j' qtcu' *t'gewr gtcf q'f'g'F qrgpuf'. '4234+0'

"

F'g'gug'o qf q.'cpvqu'f'g'rc'kpuvcekp'f'ghpkkxc'f'g'rc'r r pvc'ug'kpek'wp'r tqeguq'f'g' eqvtvcekp' { "gpvtgpc' kpvq'f'g'iqu'vcdclcf qtgu's wg'ug'f'gugo r g' °'ct'f'cp'gp'r wvqu'erc'xgu'f'g'rc' qti cpk' celp'r tqf wevxxc'0: 6' Cp' dcn'Dqtf gtgu.'gn'gpecti cf q'f'g'f'kej q'tgenwco kpvq'uquvkgp's wg<'''

"

^{3: 5} Nc'tgr t gupvcekp'f'g'iqu'vcdclcf qtgu'f'g'F gectqkr' gtvgp'f'c'rc'WQO' { 'iqu'go r t guctkqu'cti gpvkvqu'o cpvpp'f'cp' dwpvcu'tgrcekqgu'eqp'gn'f'kki gpvg'f'g'rc'ugeekpcn'Ucp'P leqif u.'P cni' q'Dtwpgnk'f'qpf g'rc'r r pvc'gucdc'wdecf c.' r qt'iq'ewcni' t gupvctqp'guc'cngtvcvxc'c'uwu'vqekqu'rc'qpgugu'Ukp'go dci' q.'f'gur w' u'f'wp'vcdclq'f'g'g'zr'ntcekp' { "eqo r tcekp'eqp'gn'UO CVC.'uqdtg'vqf q'tgcn'f'cf c'r qt'f'ktgevxxqu'cti gpvkvqu'f'gn' tgc'f'g'T gewtuqu'J' wo cpqu." eqvtvcef qu'r qt'iqu'rc'qpgugu.'rc'grgeekp'hkpcn'gec' { »'gp'gug'Anko q'i tgo kq'0'Gp'rc'iqto c'f'g'gucdrggt'gn'x'pewiq' eqp'gn'ukpf kecq'VCUC'kpvv' »'eqvtvkt'wpc'tgrcekp'eqp'dcug'gp'eqpugpuqu' { "eqphkpc'c.'c'rc'ctvkt'f'g's wg'iqu' cewgtf qu'f'gdgp' ugt' ewo r rnk qu' Ugi Ap' P qxlent' { " qvtqu' *4224+." gp' guvqu' kpekqu' iqu'f'kki gpvqu' ukpf kecrgu' f'kucto kpcdcp'iqu'cewgtf qu's wg'ug'gucdrgg'f'cp'eqp'VCUC'f'g'qvtqu's wg'ug'hkcdcp'eqp'qvtcu'vgo kpcrgu.'cni'quvpgt' s wg'rc'tgrcekp'eqp'VCUC'gtc'o' a' u'eqphkcdrg'0'

^{3: 6} Rctc'gn'genwco kpvq'f'g'r'gtuqpcn'rc'i'gtgpek'iqecni'ghkpk'iqu'tgs wvksqu'f'gn'f'g'htk'ic'eqvtvct'cpvg'rc'kpuvcekp' f'g'wpc'r r pvc'f'g' g'puco drc'lg<'l>xgpgu." gp'uw' o c { qt'f'c'f'gn'ugzq' o cewvkvq." f'g' g'ueqntkf cf' ugevpf ctk." ukp' g'zr'gtgpek'gp'gn'ugevqt' *gu'f' gek.'ukp'g'zr'gtgpek' { "ukp'oxlekqu'0: { "gp'wp'cni'q' r qtegrvlg' *cni'gf'gf'qt'f'gn'72' +.'uw' r tko gt'go r r gq'0'Gn'p'lxgn'v'epkeq'hw' tgenwcf q'gpvt'g'guw'kpvqu'wp'k'gt'ukt'qu'f'g'rc'ectgtc'f'g'f'pi'gp'gt'f'c' { "qvtcu." r tqxgpkvqu'f'g'wp'k'gt'ukf'cf'gu'iqecni'cf'cu'gp'rc' { " qpc'f'g'kphvgepek'f'g'rc'r r pvc'0'Nc'qr'ekp'r'qt'iqu'l>xgpgu' tgr t gupvdc'kpuvct'wp'i' t w' q'f'k'p'gt'q.'ew' qu'kpvgt'gugu.'o' qv'xcekqpgu' { "xcn'q'cekqpgu' t gupv'wp'hw'v'f'k'gt'gpekcu' eqp'iqu'kpvgt'gugu.'xcn'q'cekqpgu.'iki'pkkc'p'v'j' ku>tlequ.'r'gt'v'g'p'pekcu' { "eqp'egr'vqu'cegt'ec'f'gn'vcdclq'f'g'iqu'qdt'gt'qu' kpf wv'k'rc'gu'o' c { qt'gu'f'g'57'c' qu' *P qxlent'gv'cni'4224+0'

Gri'r gf kf q"gzr rffekq" f g"nu"lcr qpgugu"hwg"öpq"o g"tcki cu" c"pcf kg" f g"rc" kpf wutlc" cwqo qvtk . "pquvtqu"ngu" xco qu" c"gpug° ct" vqf q" f g"egtqö0Ewcpf q" go r ge² "j cd" 42" r gtuqpcu" gp" gn'cto cf q" f g"rc" hf dtlec0Vgp" f"rc" qr qt wplf cf" f g"tctgo g" f gr ct wco gpvqu" gpvtqu" f g" qvku" cwqo qvtegu. "s wg'uki plkdec" o gugu" f g"cj qttq" f g" vgo r q. "ukp" go dcti q. "pq" vgp" f" r gto klf q" guq0Nq" s wg" Vq{ qvc" s wgt" f" gtc" cr rlect" gn" VRU" gp" Cti gpvpc0Wpc" xcnqtcel» p" f g"rc" ecrlf cf" "uqdtg" vqf q0Gmju" pq" s wgt" f" cp" tctg" xkekqu" f g"rc" u" qvku" go r t gucu" cwqo qvtegu" cti gpvpcu" s wg" pq"rcu" xg" f" cp" dlep0Ug" tgenwcdc" i gpv" s wg" guvcdc" r qt" hwgtc" f g"rc" kpf wutlc" cwqo qvtk " r qts wg" r qf" f" cp" cduqtdgt" o " u" t" a" r kf q" nu" r tpekr kqu" f g" i" guk» p" f g" Vq{ qvc" *Cp" f" dcn" Dqtf gt gu. "gpv gxlw" r gtuqpcn" 39164243+0³: 7"

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Nc'eqpwt week» p" f g"rc" r rcpvc" gp" gn'r tgf kq" f g" \ " a tcvg" f wt» " f guf g"3; ; 6'j cuw"3; ; 9. 'ewcpf q" ug" kplektq" p"rcu" q" r gtcekqpgu. 'eqphqto " a pf qug" eqo q"rc" p"Ào gtq"4; Åhwgtc" f g" Lcr »p0: 8' Ecf c" egpvtq" o cpwlcwgt q" f g" Vq{ qvc" hwgtc" f g" Lcr »p" vkgpg" wpc" hf dtlec" öo cf tkpcö" gp" gn'r c" f" u" f g" qtki gp0Gu" f gek. "wp" o qf grq" gp" gn'ewcn' dductug" { "uqdtg" gn'ewcn' ug" guvcdngegp"rcu" hfpgcu" f g" eqo r ctcek» p0C" uw" xgl . "f lej c" r rcpvc" ug" eqpukw{ g" gp"rc" t gur qpucdng" f g"rc" ugrgeek» p. "eqo r tc" { "gp" x" f" g" nu" r tpekr crgu" uwo kpkntqu" g" kpuwo qu. " { "gp"rc" uwr gtxkuk» p" f kctkc" c" f kucpekc" f g"rc" o ctej c" f g" uw" r tqeguq" r tqf wevxxq" { " f g" o gtecf q" *P qxlcm' gv'cnf" 4224+0' Gn' ukvgo c" vgepq» i keq" xgp" f" c" f kgevo gpv" r tqr wguv" r qt" rc" hf dtlec" o cf tkpc" f g" Lcr »p0: 9" Cu" f" gn' egpvtq" kpf wutlc" f g" tghgt gpek" r ctc" gn' f g" \ " a tcvg" gtc" gn' f g" Vcj etc. "f qpf g" ug" r tqf we" f" cp"rcu" J kwz" { "UY 6." { "nwi q" eqo gp| » "c' hcdtlect" gn'ö qf grq" Ngz wu. "f g"rc" i co c" f g" hwlq" f g" Vq{ qvc0Gp" uwu" kplekqu. "rc" r rcpvc" f g" \ " a tcvg" gtc" wpc" hf dtlec" f g" ecttqegt" f" r kpwtc" o qpvcig. "ukp" vcmgt" f g" guvco r cf q" { "u»m" eqpvc" eqp" ugku" tqdqwu" *Hg{ uugpgv"3; ; : +0'

Gri' r tko gt" o qf grq" s wg" ug" r tqf vlq" gp" Cti gpvpc" hwg" rc" r keni' wr " Vq{ qvc" J kwz 8à' I gpgtcek» p. "hcdtlect" c" gp" uwu" xgtukqpgu" f g" ecdkpc" uko r ng" { "f qdng" { "tceek» p" 6z4" { "6z6" s wg. "c" r ctvk" f g"rcu" eqo dkpcekqpgu" eqp" f hgt gpvqu" vkr qu" f g" o qvqtgu. "ngi cdc" c" vpgt"rc" r qukd klf cf" f g" eqpwtvk" xglpv" xctkcpvqu" f kpkvcu" *xt" Vcdrc" KX/4+0' Gp" nu" r tko gtqu" c° qu" rc" guecnc" f g" r tqf week» p" hwg" o " pko c. "gn'xqno gp" r qvpeknf" f g"rc" r rcpvc" f g" \ " a tcvg" c"rcp| cdc" 42022" wplf cf gu"

3: 7" Rctc" co r rict" uqdtg" rc" f ko gpuk» p" rcdqtenf" f g" Vq{ qvc" Cti gpvpc" eqpwtct<" Tco c" *4226<" 324/336+ "Dcwukpk" *4223+ "f rctgl" P gy o cp" *4234+ "F qrgpumf" *4234+ q" Hg{ uugpgv" *3; ; : +0'

3: 8" Ugi Àp" Gf wctf q" Mtqpdgti . "glgewkxq" f g" VCUC" f guf g"3; ; 8. "rc" vdlceek» p" f g"rc" hf dtlec" hwg" gur gekm gpv" grgi kf c" r qt" uw" kpvgtugeek» p" gpvtg"rc" T we" P cekqpcn" 34. "s wg" eqpgevc" eqp"rc" tgi k» p" o guqr qv° o lec" f g" Cti gpvpc" { "hwgi q" eqp" Dtcukl" r gpucpf q" gp"rc" gzt qvcek» p" f g" xgi " f wqu" { "rc" T we" P cekqpcn; . "s wg" xkpwrc" cn'pqv" f gn' c" f" u" eqp" Dwgppqu" Cktgu" r rpkhcepf q"rcu" xgpvcu" f g" xgi " f wqu" cn'ö gtecf q" kpvtpq" { "rcu" eqo r tcu" f g" t qxggf qt gu" cwqr ct wucu" hqecrgu: " { "uw" egtecp" f" cn' r wgtv" Vgto kpcn" \ " a tcvg. "r qt" gn'ewcn' ngi cp"rcu" cwqr ct vgu" ko r qt wcf cu" r ctc" kpeqr qtct" gp" nu" xgi " f wqu" *Gf wctf q" Mtqpdgti . "gpv gxlw" r gtuqpcn" 4: B 4244+0' Ugi Àp" qvtq" glgewkxq" f g" Vq{ qvc. " "la operación logística desde este lugar es muy beneficiosa desde la cercanía y la facilidad de accesos. Todos los días acá entran un montón de camiones trayendo partes para la producción de proveedores. Por otro lado, hacemos toda la operación de salida de vehículos. Operamos Brasil sur por camión" " "glgewkxq" f g" Vq{ qvc. "gpv gxlw" r gtuqpcn" 461: 4243+ *xt" Kó ci gp" 2/4" f gn' Cpgzq" Guxcf " f wleq+0'

3: 9" Gri'ö kuo q" gtc" kpeqr qtcf q" ukp" pgi qekcek» p" r qt" rc" i" gtgpek" hqecnl' " hqu" clwugu" s wg" ug" t gcnk' cdc" p' hqecm gpv" gtc" p" u»m" f g" dcn'pegq" f g"rcu" hfpgcu'

r qt" c° q0' Ulp" go dcti q." ecdg" f guvcect" s wg" f guf g" 3; ; . " c° q" gp" gn' s wg" gn' xgj ¶ewru" gu" eqo gtekrk cf q"gp"gn' gtecf q"mecn"ug"eqpxkgtvg"gp"rc'r kem'wr "o a u'xgpf kf c" f g'uw'ugi o gpvq0"

4.3 - Argentina en el Proyecto IMV

" Verleqo q'ug'f gucttqm»gp'gn'ecr ¶ewru"cpvgtkqt."gp"4224'VO E'rcp| »'gn'r tq { gevq'KO X0Gn' o kuo q"ug" f guvpcdc" c"rc" f kxkuk»p"kpvtgpcelqpcn' f g"r r'vchqto cu' f g" f gvtgto kpcf qu" xgj ¶ewru" xgpf kf qu"gzenukxco gpvg"gp"mqu"o gtecf qu"hwgtc" f g"lcr »p0'Ugi Àp" Ct| c" { "N»r gl "422: <359/35: +gug'r tq { gevq'ko r rke»"s wg"Vq { qc"hwgtc"gp"mqu'r tko gtqu" c° qu' f gn'uki m'rc"Àplec"vgtgto kpcn' f g" Cti gpvpc" dclq" wpc" guvcvgi kc" i mdcn" o kpvvcu" s wg" gn' tguvq" ug" tgi ¶cp" eqp" guvcvgi kcu" tgi kqpcrgulqecrgu0'

Rctcf »lkeco gpvg."gug"r tqi tco c"ug"eqo gp| »"c"ko r ngo gpvct"gp"o gf kq" f g" wpc" f g"rcu" etkuku"geqp»o lecu"o a u'ko r qtvcpgu" f g"rc"j kvqtkc"cti gpvpc0'C"r guct" f g" guv" ukwcekp."VCUC" hwg"grgi kf c"eqo q'egpvtq" kpf wutkn' f g"r tqf week»p" { "gztvcelp"r ctc" Egpvtq" { "Uwf co 2 tlec."m" s wg" uki pke»" r ctc" rc" go r tguv " *una clara demostración de confianza en su capacidad industrial, contribuyendo a promover mayor actividad productiva entre los proveedores* " *Dcrpeg"VCUC"39194225+0'Uw"r tguv gpvg"gp" gug"gpvqegu."Vqo kq"Mcuvwc"uquvgp¶c"s wg" " *a pesar de cualquier dificultad política o económica coyuntural del país, (la casa matriz) cree en el éxito permanente de Toyota en la Argentina* " *Nc" P celp."421; 4224+0C'lw'xg|. 'gn'f kt gevqt" f g" Tgrcekppgu" kpuvkwekqpcrgu"gp" gug"o qo gpvq." F cplgn'CHqpg."tgo ctecdc" s wg" " *Toyota hace planes con anticipación y los cumple (...)* Las compañías japonesas no toman decisiones de un día para el otro " *Nc" P celp."39194224+0'Rctc" TcÀn'Co kn" r tguv gpvg" f g"rc" r tqxggf qtc" f g" Vq { qc."Xgpvcnw . "rc" kpxgtuk»p"rg"mco »"r qf gtquco gpvg"rc"cvpekp»p" { "rg" f go quv»"wpc"o kcf c" f g"rc"ti q"r rc| q" f g"rc" go r tguv"o w| " f hgtgpvg" c"rcu"vgtgto kpcrgu" qeekf gpvcrgu" kpuvrcf cu"gp" gug" o qo gpvq"gp"gn'r c¶u0'Ugi Àp"gn'go r tguvktq." " *en 2002 Argentina estaba prendida fuego. Fuimos a la reunión anual de proveedores y Katsuta anunció la inversión. Nosotros nos mirábamos y no entendíamos nada. El tipo captó las caras de escepticismo y dijo: los países no desaparecen. Argentina va a salir, tiene un montón de potencial y Toyota mira a diez años para adelante* " *TcÀn'Co kn"gpvtgxkuc"r gtuqpcn'3; 184244+0'

Uki wgpvq" c" F lgi q" Rctcf q. " f kt gevqt" f g" Cuwvqu" Eqtr qtcv'xqu" f g" Vq { qc" Cti gpvpc. ""

Eqo q" Vq { qc" ukgo r tg" guv" qtlgpvcf c"cn'rc"ti q" r rc| q" j cd¶c" cpcrk cf q"mqu" guvcf qu'e¶erlequ" f g"rc" geqpqo ¶c" cti gpvpc" { "rc"wpqco gtekcpc"gp"i gpgtci" { "ucd¶c" s wg" guvq" gtc" wpc" ec¶c" { "s wg" f gur w' u" kdc" c" j cdgt" wpc" tgevr gtecel»p0'Gpvqegu."gp"gn' b gf kq" f g"rc" etkuku."gp"gn' c° q"4224'cpwpek"rc"gzr cpuk»p" f g"rc" r r'pvc" f g"42022" c"67022'wpl cf gu" { 'lg'gukw cdc"rc"eqvtevcelp" f g"rc" r tqzko cf co gpvg"4022'r gtuqpcu' b a u00 kpvvcu'gn' tguvq"

f g'ru'vgo kpcru'gucdcp'f gur kf kqpf q'i gpvg'Vq{ qvc'o cpvpp'c'gn'vcdclq'f g'uwu'622'r gtuqpcu'gp'hwpekp'f g' uw'eqo r tqo kuq'f g'pq'f gur kf qu.'r gtq'c'uw'xg| 'vco dkp'r qts wg'ucd'c's wg'gucdc'r tgr ct^a pf qug'r ctc'rc' gzcrcpukp'hwwtc'f g'rc'r rcpvc'it gewr gtcf q'f g'F qrgpun{ . '4234+0'

"

Gurqu'o qxko kqpvqu'f gpqvcp'emctco gpvg'wpc'ectcevgt'f'wlec'r ct'vewct'f g'rc'*estrategia empresarial*'f g'Vq{ qvc'gp'Cti gpvpc0'Gur ge'f'leco gpvg.'r wgf g'xgtug'wpc'ceekp'r rcpk'lecf c'c' rcti q'r rcl q'r tqr kc'f g'guc'go r t'guc'o wmpcekqpcn'lcr qpguc.'eqo q'r wf q'xgtug'gp'gn'ecr 'f'wru' cpvgtkqt0' Gp' guvg' ecuq.' gp' wp' o qo gpvq' f g' hwgtvg' eqpvtceekp' f g' rc' geqpqo 'c' { 'cnc' kpegtkf wo dtg.'rc'hko c'f gekf k' tgcrlk ct'wpc'cr wguv'ctt'kui cf c'gp'rc'r rcpvc'mqecr's wg'rg'f ct'c' wpc'i tcp'ko r qtvcpek'gp'rc'gwtwewtc'kpvtpcekqpcn' { 'tgi kqpcr0'Cu'f'rc'kpxgtukp'f g'Vq{ qvc'gp' 4224'f go wguvtc'wp'r rcp's wg'ko r r'ecdc'wp'r rcl q'f g'7'c'32'c° qu.'uw'lekpvg'go gpvg'kpf gr gpf kqvg' f g'lekrq'geqp»o leq'cti gpvq'f g'gug'o qo gpvq0'

Gp'gug'ugpvk'f q.'ugi Àp'F cplgn'Chkqpg.'rc'f gxcnwcekp'f gn'r guq.'s wg'f kuo kpw'f »'hqu'equvqu' kpvtpqu' gp' f »rctgu.'pq' hwg'rc' tcl »p' f g'rc' kpxgtukp.' { c's wg' "*la paridad cambiaria es coyuntural*" *Nc'P cekp.'421; 4224+0'C'uw'xg| . 'gn'f k'gevt'eqo gtekr'f g'rc'hko c.'O cucuj k' Qpk'cy c.' r tqpvw'ecdc' s wg' "*se arreglará la situación política y habrá un acuerdo internacional con la Argentina. Así se recobrará la confianza en el futuro y se venderán entre 130.000 y 150.000 automotores*"^{3:} *Nc'P cekp.'421; 4224+0C'uw'xg| . 'hqu'f k'gevt'k'qu'f g'Vq{ qvc' tgo ctecdcp'f guf g'gug'o qo gpvq's wg'guvg'r tq{ gevq'f c'c'rc'Cti gpvpc'rc'r qudkrk'cf 'pq'uw'q'f g' cdcugegt'cn'o gtecf q'cti gpvq' { 'cn'O gtequw.'ukpq.'cf go ^a u.'r qf gt'gzcrc'vt'c'vq'c'Egptq' Co ²tlec.'Ectkdg' { 'Uwf co ²tlec'*Nc'P cekp.'421; 4224+0"

" Ugi Àp'Gf wctf q'Mtqpdgti . "

"

Gnr' t'pek' r'c' q'v'xq'r qt'gn'ewcn'lug'gn' g'c'Cti gpvpc'gp'gn'r tq{ gevq'JO X'gu'r qt'rc'r tqf weekp'f g'r tqf wevqu' r tko ctkqu'f g'rc'tgi k'p0'Grl'xg' f'wru's wg'pquvt'qu'fcdtleco qu'rc' r'ec'c'vq'f q'm's wg'gu'r tqf weekp'r tko ctkc' ci tlewmtc.'i cpcf gt'c.'r gucc.'o kpgt'c.'r gv»rgq.'gve0'Nc'tgi k'p'eqo r r'gv'f guf g'Egptqco ²tlec'r ctc'cdclq' r tqf weg'r tqf wevqu'r tko ctkqu.' { 'r qt'bo vej qu'c° qu'bo ^a u'xc'c'ugi wkt'cu'f'gpvqpegu'gmqu'xkgtqp's wg'gn'r qv'pekn' s wg'v'gp'c'Co ²tlec'Nc'vpc'g'c'o w' 'cnc' *i -'Gtc'o w' 'kppqxc'f qt'r ctc'pwgwtc'tgi k'p'r qts wg'g'c'gn'Àpleq' r tq{ gevq'eqp'dcug'gp'Cti gpvpc.'r gtq'r gpucpf q'gp'rc'gzcrc'vt'wcekp'*Gf wctf q'Mtqpdgti . 'gpv'gxknc'r gtuqpcn' 4: B 4244+0"

"

F g' guvg'o qf q.'ug'ghgew»'wpc'kpxgtukp'f g'w&u422'o kmppgu.'r t'gxkqpf q'vkr r'ect'rc' ecr celf cf 'f g'r tqf weekp'gp'rc'r rcpvc'kpf wutkcn'f g' \ ^a tcvg'c'æcp| c'pf q'rcu'82022'w'pk'cf gu'r qt' c° q.'f g'ru'ewcru'ug'gzcrc'vt'c'p'67022'c'Egptq' { 'Uwf co ²tlec'*Dcmpeg'VCUC.'39194225+0'

^{3:} 'Nq'ewcn'ghgew'xco gpvg'uwegf k'eqp'rc'tgewr gtecekp'f g'hqu'c° qu'uki wkpvgu0'

C"uw" xgl ."rc" kpxgtuk»p"ug" wkk »" rctc"rc" eqputweek»p" f g" wpc" r rcpvc" f g" guvco r cf q" { "rc" pcekqpcrk cek»p" f g" r kgl cu" f g" guvco r cf q." eqo r qpgpvgu" f g" r rñ uvkq." ej cuku." It gpqu." culegpvqu." vps wgu" f g" pchc" { "r ctvgu" f g" o qvqtgu" *Nc" P cek»p." 421; 14224-0 Cuko kuo q." ug" kpeqtr qtctqp" o a u" f g" 922" go r rncf qu" { "ug" co r rñ "rc" r rcpvc" kpf wutkn" gp" 38822" o 4" *Dcncpeg" VCUC." 49 19 14227-0 Cf go a u." ug" kpxk vgtqp" w&u6" b kmppgu" r ctc" rñ kpuvceek»p" f g" wpc" hfgc" f g" gpucio dmf q" f g" o qvqtgu" eqp" ecr cekf cf " f g" 92022" wpkf cf gu" cpwrcgu" *Dcncpeg" VCUC." 4; 1: 14228-0

Gñr tqi tco c"ug" hcp| »" gp" eqplwpvq" eqp" gnif kug° q" f g" rñ "pwgxc" r leniwr "J knwz" 9àI gpgtcek»p" s wg" ug" r tqf wq" f g" guf g" 4226" *xgt" Vcdrc" KX/4-0 Nc" pwgxc" J knwz" lo r rñ »" kppqxcekqpgu" lo r qt vcpvgu" gp" gnò wpf q" f g" rñ u" r leniwr u0 Gñxgj "pwnq" kpeqtr qt»" o qvqt k cekqpgu" f g" cxcpl cf c" vgepqrqi "c" s wg" cncp| cdc" o a zko qu" plxgrgu" f g" r qvgepk" c" dclcu" t g x q n e k q p g u" { "qvqti cdc" i t c p f g u" o g l q t c u." v c p v q" r c t c" g n" t a p u k q" g p" r u" e c m g u" { "t w c u" e q o q" h w g t c" f g" g m c u" C" u w" x g l ." g n" e q p h q t v" k p v g t p q" h w g" t g p q x c f q" e q p" p w g x c" g t i q p q o "c." e q p h i w t c e k » p" f g" rñ " u w r g p u k » p" f g" r c p v g t c" { " p k x g n" i f g" g s w k r c o k p v q" *Dcncpeg" VCUC." 49 19 14227-0 Ugi Àp" Gf wctf q" Mt qpdgti ""el 2002 es el punto de quiebre de nuestra fábrica (...) el proyecto IMV y la nueva Hilux que lanzamos en el 2005 realmente revoluciona el mercado de las pick ups. Era un vehículo super innovador. El cambio fue un salto innovador altísimo, de calidad. La terminación, el interior, el confort" *Gf wctf q" Mt qpdgti ." gpv g x k u r " r g t u q p c n" 4: B 14244-0"

F g" hqto c" uko krc" t" ug" g z r t g u c" g n" i r t g u k f g p v g" f g" X g p v c n w o ." "la salida de este modelo fue un punto de quiebre en la trayectoria de Toyota (...) la Hilux anterior y la Ranger eran muy similares hasta ese momento. Después, cuando Toyota saca el modelo del 2004, le saca años de ventaja. A todas las demás. Ahí pegó el salto. Después la alcanzaron, pero ya estaba en otros volúmenes de producción, ya había sacado la ventaja" *Tc Àr" Co kn" gpv g x k u r " r g t u q p c n" 3; B 14244-0 Vco dk p" gu" t c w h e c f q" r q t" F c p l g n" J g t t g t q." s w k p" c f g o a u" c o c f g" s w g" "dejó de ser solo un utilitario y comenzó también a servir de manera recreacional (...) Con el IMV los segmentos más altos de la Hilux, con automático y todas las prestaciones, ya era un vehículo que podía competir en el segmento de autos de lujo" *F c p l g n" J g t t g t q." gpv g x k u r " r g t u q p c n" 3 19 14244-0"

Tabla IV-2 - Modelos de Toyota Hilux

Modelos de Toyota Hilux	Años de vigencia	Principales características y mejoras
6° Generación	1998-2004	Mayor espacio y comodidad en cabina.
		Motores de 2 lts gasolina y 2,4 lts diesel.
7° Generación	2005-2015	Parte del proyecto IMV.
		Versión actualizada del chasis.
		Cambio total de diseño con apariencia innovadora.
		Importantes innovaciones en la motorización.
Big Major Change	2012-2015	Nuevo diseño.
		Nueva consola central.
		Nuevos modelos de motor turbodiésel.
8° Generación	2015-Actualidad	Sistema electrónico de tracción.
		Impulsores turbodiésel de nueva generación.
		Opciones de 6 velocidades.
		Mejor habitabilidad y confort de marcha.
		Mejor insonorización.

Hwpgv<gndqtcck»p'r tqr kc"gp'dcug'c"Vq{ qvc'I mdcrl'

"

Cf go^a u.'gnrl tq { gevq'KO X'lpemw{ »'rc'r tqf week»p'f gnrl tko gt'xgj f»wru'f gr qt vlxq'wrlkctkq' »UWX+f gn'O gtequwt. f gpqo kpcf q'UY 6^{3:}: *F qrgpumf . '4234+0' uv'gu'wp'f gtlxq'f'g'rc'r lenlwr " J knw's wg'eqo r ctv'uw'r r»vchqto c'r tqf wevxc" { "guxdc'f guv'kpcf q'c"cdcuvegt'cn'o gtecf q'mecrl' { "cn't guv'f'g'Co² tlec'Ncv'kpc'0'Nc"guvcvgi kc'f'g'r r»vchqto c'eqo Àp'i gpgtcm gpvg'eqpukvg'gp'rc' r r»vchqto c'»ej cuku" { "guxvewtc+" { "f kxgtuqu'uwduku'go cu'o ge^a plequ'eqo r ctv'f qu'r qt'f kht gpvgu' o qf grqu.'m's wg'r gto kg's wg'rc'r tqf week»p'qdv'gpi c'geppqo f'cu'f'g'gucrc'eqp'gmqu'0'Guc'r ctv'g' kphgtkqt'f'g'ru'xgj f»wru'gu'o gpqu'f gvgto kpcpv'f'g'uw'gu² vlec." { "gu'gp'rc'r ctv'uw'r gtlkt'f'qpf'g' ug'f'gucttqnc'rc'f'kht gpekck»p'f'gnrl tqf wevq. 'f'g'f'qpf'g'uw'i gp'rc'u'geppqo f'cu'f'g'craepg'0"

Gn'wvq'f'g'r r»vchqto cu'eqo wpgu'j' c'ukf'q'wpq'f'g'mqu'hcevqtgu'f'kukp'v'xqu'f'g'Vq{ qvc'gp'rc' Cti gpv'kpc.'gur gekcm gpvg'f'gpvtq'f'gnlgi o gpv'f'g'r lenlwr u'0C'f'kht gpek'f'g'Hqtf'q'Xqmuy ci gp." Vq{ qvc'hwg'rc'Àplec's wg'cr tqxgej »'rc'r r»vchqto c'f'g'rc'r lenlwr "J knw'r ctv' tqf wek'wp'UWX^{0:} 2" Guv'rg'r gto kx'»i cpct'geppqo f'cu'f'g'gucrc'gp'rc'r tqf week»p'f'g'guc'r r»vchqto c.'m's wg'tgf wpc' gp'rc'tgf week»p'f'g'eququ=" { "c'r ctv'f'g'gmc'qdv'pgt'geppqo f'cu'f'g'craepg'cn'r tqxggt'f'qu"

^{3:} "Gp'qtqu'r c'f'igu'gug'xgj f»wru'gu'f'gpqo kpcf q'Vq{ qvc'Hqtwpgt'0"

^{3:2} "Guc'pq'hwg'rc'guvcvgi kc'f'g'Hqtf'pkf'g'Xqmuy ci gp.'s wg'eqo r ngo gpv'cdp'rc'r tqf week»p'f'g'rc'u'r lenlwr u'eqp'rc' r tqf week»p'f'g'cwqo »xkrgu.'r gtq's wg'pq'eqo r ctv'f'p'r r»vchqto cu'r qt'm's wg'rc'u'gucrc'u'r tqf wevxcu'r qt'r r»vchqto c' gtecp' uwucpekm gpvg' o gpqtgu'0' Gu' ko r qtvpv'g'f'gucct' s wg' o kpv'cu' Xqmuy ci gp' c' plxgri' i mdcrl' pq' v'kpg' f'gucttqmf'c'wpc'UWX'gp'dcug'c'rc'r r»vchqto c'f'g'rc'r lenlwr "Co ctqnc'Hqtf' r tqf v'q'rc'UWX'Gxgtguc's wg'eqo r ctv'g' r r»vchqto c'eqp'rc'r lenlwr "Tcpi gt.'gp'uw'r rcpvcu'f'g'Uw^a h'lec.'Vckrpf'kc.'Ej kpc'g'kpf'kc.'f'gtq'pq'cu'f'gp'rc' Cti gpv'kpc' *F wrelej . 'gp'r tgpuc'0"

ugi o gpvqu'f kulpvqu'f gn'o gtecf q'cwqo qvqt'c'r ctvt'f g'rc'o kuo c'r rrvchqto c."gn'f g'r kem'wr u'
o gf kpcu{"gn'f g'UWX"off-road0

F g'gug'o qf q.'rc'r rcpv'f g'\ a tcv'ug'eqpxk'v'gp'rc'vtegtc'gp'r tqf wekt'gn'o qf gm'UY 6'
f gur w' u'f g'rcu'f g'Vckrpf k{"Uw' a h'kcc0Guv'f geku'p'f g'rc'ecuc'o c'v'k' guwxq'dcucf c'gp'mqu'
cnqu'gu' pf ctgu'f g'r tqf week'p'c'rc'p' cf qu'gp'g'm' *C wqj kvqt k.'4242+0Ugi Àp' Cp' d'cnDqtf gtgu."
"la ventaja de tener la misma plataforma nos dio mucha flexibilidad para jugar si hay más
demanda de SW4 o de la pick up" *Nc'P cel'p.'5 4 4228+0

Rctc'rc'hcdtkecel'p'f g'gug'pwgxc'q'o qf gm.'gp'4226"Vq{ qvc'r kf g'ugt'kpenw'c'gp'gn'
T²i ko gp' f g' K r qvcel'p' f g' Dkpgu' K'v'gi tcv'gu' f g' òI tcv'gu' Rtq{ gevq' f g' K'xgtuk'pö'
*T guqmwel'p'P à'478 4222+'r ctc'rc'ko r qvcel'p'f g'dkpgu'uk'p'f gtgej qu'f g'ko r qvcel'p's wg'
h'qto cp'r ctvg.'gzenw'k'co gpvg.'f g'wpc'pwgxc'f'pgc'f g'r tqf week'p'r ctc'rc'hcdtkecel'p'f g'rc'UWX"
UY 6'r qt'wp'o qp'v'f g'86'o kmppgu'f g'f »rctgu'HQD"*T guqmwel'p'33; 4226+0Cu'f'gp'4227'ug'
rc'p' »" rc' UY 6." wpq' f g' mqu' xgj 'f'w'qu' p'cel'p'rc'gu' f g' o c{qt' r tgeq' gp' gn' o gtecf q' m'ecn'
*42 32 4227." Nc' P cel'p+' {" ug' eqo k'p' cp' c' r tqf wekt' rcu' r tko gtcu' J kwz' 9'À'I p'gtcel'p.'
eqpxk'v' pf qu'g'gp'rc'ugi w'p'c'h'k'cn'gp'gn'o w'p'q'gp'r t'gug'v'ct'gn'r tko gt'xgj 'f'w'qu'ò'i m'dc'ri'f g'
Vq{ qvc' *D'c'rc'peg'VCUC.'49 19 4227+0

F g'gug'o qf q.'rc'g'geek'p'f g'Cti gp'v'pc'eqo q'r ctvg'f gn'r tq{ gevq'KO X'o w'g'w'c'e»o q'gn'
r c'f'u'h'qto cdc'r ctvg'f g'wpc'g'w'c'v'gi k'f g'o a u'rcti q'r rc| q'f g'rc'eqo r c'° 'f'c'o w'k'p'cel'p'rc'nc'eqp'gl'g'
gp'rc'g'zr qvcel'p'r ctc'rc't'gi k'p'0'Guv'ug'gpo ctecdc'gp'wp'r gt'f'q'f'f g'g'zr cpuk'p'f g'VO E'gp'
geqp'qo 'f'cu'go gti gp'v'gu'{"gp'rc'd'À'us w'g'c'f'f g'h'qto ct'wpc'go r t'guc'ò'i m'dc'ri'c'k'p'ek'qu'f g'uki m'0'
Guv'r tq{ gevq'ko r r'ke»'pwgxc'k'p'xgtuk'p'gu.'co r r'cel'p'p'gu'r tqf wek'x'cu.'gn'pwgxc'q'o qf gm'f g'rc'
J kwz'{"gn'eqo k'p' q'f g'rc'hcdtkecel'p'f g'rc'UY 60Gp'r ct'v'w'rc't.'gug'À'w'ko q'r w'p'v'q'h'w'g'q'v'c'è'rc'x'g'
f g'rc'g'w'c'v'gi k'k'p'p'x'cf q'c'f g'Vq{ qvc'gp'Cti gp'v'pc.'cn'eqo r ct'v'k'rc'r rrvchqto c'r tqf wek'x'c'r ctc'
rc'hcdtkecel'p'f g'f qu'xgj 'f'w'qu'f kulpvqu.'h'q'è'w'cn'g'r gto k'k'»'c'j q'ttct'è'qu'qu'gp'eqo r ct'cel'p'è'qp'
uw'eqo r g'w'f qt'gu'r tqf weq't'gu'f g'r kem'wr u'0'Guv'qu'up'q'v'qu'f g'mqu'h'c'v'q't'gu'f g'v'gto k'p'cp'v'gu'f g'rc'
v'c{ gevq'k'f g'Vq{ qvc'Cti gp'v'pc'c'iq'rc'ri q'f gn'r t'gug'v'g'uki m'0'

"

4.4 - Ejecución del IMV e inserción regional

" Eqo q'eqpugew'g'pek'f gn'rc'p' co k'p'v'q'f gn'r tq{ gevq.'gp'4224'ug'è't'g'c'wpc'pwgxc'g'w'c'w'w'c'
cn'k'p'v'g't'k'q'f g'rc'o w'k'p'cel'p'rc'nc'f g'VO E.'f gp'qo k'p'c'f'c'Vq{ qvc'O gtequw'0'Guv'v'gp'f'c'c'uw'ecti q'rc'
eqqt'f k'p'cel'p'f g'rcu'c'v'k'x'f cf gu'f g'Vq{ qvc'Cti gp'v'pc'{"Vq{ qvc'f'q'D'c'uk'0'Ugi Àp'rc'go r t'guc.'
g'w'q't'g'h'g'l'»"la firme intención y vocación de Toyota de avanzar firmemente en el mercado
latinoamericano, afianzando su presencia dentro del sector automotriz" *D'c'rc'peg'VCUC"

39194225+0'Rqt"qvtq"rcf q."gp"4228"ug"grki g" c" Cp"dcn'Dqtf gt gu."eqo q"gn'r tko gt"r t gulk gpgv"
cti gpvkp q" f g"VCUC0Guv"glgewkxq"j cd"fc"ukf q"i gt gpgv" f g" Tgewtuqu"J wo cpqu" f guf g"3; ; 7"j cuvc"
4225." ewcpf q" ug" stcurf »" c" Dtcuki' r ctc" qewr ct" r" f ktgeek»p" f g" Tgewtuqu" J wo cpqu" { "
Rrcpgco kpgvq"Eqtr qtcvxxq" f g"Vq{ qvc"O gtequw0:3"

Ugi Àp" glgewkxqu" f g" r" eqo r c° "fc." r" r wguv" gp" o ctej c" f g" guvg" r tq{ gevq" wxq" wp"
qdu³ ewr" gur ge"heq<" r" eqo r gvpekc" kpgtpeckpnci" eqp" Vq{ qvc" Vckrcpf kc0 Vcni' eqo q" ug"
f gucttqm»"gp"gr'ecr "wru"cpvgtkqt."Vckrcpf kc"ug"guvcdrgck»"eqo q"gn'hub"o wpf kn'f g"r tqf week»p"
f g"Vq{ qvc"J kwz."eqp"i tcpf gu"xqnÀo gpgu" f g"r tqf week»p" { "cnqu"pkxgrgu" f g"eqo r gvkkxkf cf 0Nc"
f ktgevqtc" tgi kpcn' f g" Hkpcp| cu" uquvkgp" s w" *“al momento de querer expandirse a nuevos
mercados, la pregunta de Japón era de esperar: ¿por qué invertirían para aumentar la
capacidad de producción en Argentina teniendo Tailandia, con capacidad ociosa y lista para
hacerlo?”* *K tqhgukqpcn" 43 B 4244+ Cpvg" guvg" f gucl"fq." f guf g" r" hkn'cn' rjecn' wxkgtqp" s w"
rtqr qpgtug" *“ser competitivos genuinos”* *K tqhgukqpcn" 43 B 4244+0 Uki wkgpf q" c" F cplgn'
J gttgtq." *“el compromiso fue bajar el costo para hacernos competitivos. Tenés que poner tu
costo más barato que Tailandia. Y lo hicimos junto con todos los proveedores. Todos
acompañaron en ese proceso de reducción de costos para hacernos competitivos”* *F cplgn'
J gttgtq." gpt gxlwv" r gtuqpcn" 39194244+0'

Gp"ewcpvq" c" rcu"xgpvc"cu" f g" equvqu" f g" Cti gpvkpc" eqp" Vckrcpf kc." iqu" glgewkxqu" f g" VCUC"
tgo ctecp" iqu" vcvf qu" eqo gtekrqu" f g" Cti gpvkpc" eqp" iqu" r c" iqu" f g" Co 2 tlec" Ncvpc" *xgt" Ecr "wru"
4+ " { "gn'equvq" f gn' hrgv." s w" gu"uwucpvkxco gpgv" o gpqt" f cf c" r" r tqzko kf cf "i gqi tª hcc0Rqt" qvtq"
rcf q." r" r tlpckr cn' f guxgpvc" ug° cncf c" r ctc" Cti gpvkpc" gu" r" ecti c" lo r qukkxc0' Gp" ewcpvq" c" r"
ewguk»p" rcdqtcn" cni wpu" glgewkxqu" ug° cncp" gn'o gpqt" equvq" f g" r" o cpq" f g" qdtc" vckrcpf guc" { "uw"
cnc" f kckr rkc." ukp" go dci q." r" ecti c" f g" iqu" ucrtkqu" gp" rcu" xgpvcu" vqvcrgu" f g" r" kpf wutkc"
cwqo qvtk" pq" gu" vcp" uki p hccvxc" gp" eqo r cteck»p" eqp" qvtqu" ugevqt gu" kpf wutkrgu." eqo q" gn'
vgz vk0Rctc" VCUC." gn'r guq" f g" iqu" ucrtkqu" uqdtg" rcu" xgpvcu" p'gvcu" f wcpvg" gn'r gt" qf q" dclq" guwf kq"
xctk»" gpt g" gn'5' " { "gn': " *xgt" I tª heq" 2/38" f gn' Cpgzq" Guvcf " iurkeq+0'

Ukp" go dci q." r" tgrck»p" eqp" iqu" vcdclcf qt gu" u" gtc" uwucpeckm gpgv" f kgt gpgv" gpt g"
Vckrcpf kc" { " Cti gpvkpc0' Gp" r ct vewrct." gp" gn'eco r q" rcdqtcn' ug" tgi kumctqp" hwgtvqu" vgpukppgu" gpt g"
VCUC" { " gn' UO CVC" gpt g" 4225" { " 42290' Ugi Àp" F kgi q" Rrcf q." r" eqo r c° "fc" uwtk»" wp" eco dlq"
f tcoª vck»p" r' ewguk»p" ukpf kecn' r qts wg' r cu»" f g" vpgt" wpc" r ct vckr cck»p" dclc" f gn' ukpf kecvq." r qt"
ugt" wpc" go r tguv" ej kec" gp" r" s w" gn' UO CVC pq" ug" j cd" fc" kpxqmwetcf q." c" ugt" wp" qdlgkxq" vgpvcf qt"

3; 3" C" r ct vck" f g" 4228." uqu" cti gpvkpu" f kki kgtqp" r" eqo r c° "fc." cwps vg" cr tqzko cf co gpgv" r" o kcf" f g" iqu" f ktgevqt gu"
eqpvkpwctqp" ukpgf q" lcr qpugu" *xgt" Vcdrc" 2/34" f gn' Cpgzq" Guvcf " iurkeq+0'

gp"wp"r tpeguq"fg"pgi qekcekp"o w{ "f wtq" f qpf g"r tgvpgf "p"gi qekt"eqp"vqf cu"rcu"go r tgucu"gp" hqto c" uko wñ pgc" { " wuct" r" o kuo c" gwtcvgi kc" eqp" r" kpf gr gpf gpek" f g" s wg" Vq{ qvc" j cd"p" o cpvpgkf q"rc"hwpgv"fg"tcdclq"fg"rc"i gpvg" { "rcu"vqtcu"j cd"p"p" f gur gf kf q0Uki wkgpf q"cn"glgewkxq." "

UO CVC"waxq"wp"r qulekp"o w{ "f wtq" s wg"uki pkk"»"wp"eko dtqpc| q"o w{ "i tcpf g"r ctc"Vq{ qvc0Ne"eqo r c° "p" gpvqpegu"s wgf »"j cuvc" f gueqmecef c"r qts wg"hwg"wp"eco dlq" f g"tgi rcu"o w{ "ft" a uweq0Cj "u"j wdq"ukwcekqpgu" f g"eqphleq"dcuwpvg"ko r qtwpvgu"s wg"uki pkkectqp"s wkgu"fg"eqqr gtcekp."r ctqu."vgo cu"s wg"uwht"vqf c"rc" kpf wwtkc."r gtq"s wg"Vq{ qvc"hg"equ»"b wej q"cuco kctm0Guq"hwg"j cuvc"gn4228/4229" { "f gur w"u"eqp"wp"r qeq" f g"cr tgpf k clg"o wwg."vcpvq"r qt"r ctvg" f gn"upf kecq."s wg"co dlē p"waxq"wp"eco dlq" f g"eqpf weekp"gp"gric° q" 4228"ewepf q"cr ctgeg"gn"pwgq"rkf gtc| i q" f g" Tlectf q"Rki pcpgrk"eqo q"r qt"r ctvg" f g"Vq{ qvc."ug"go r kgl c"c" eqput wkt"wp"pwxq"tgrcekp"gpvg"co dqu"gp" f qpf g"ug"go r kgl c"c"dwuct"wp"pwxq"r wpvq" f g"dcwpeg"q" gs wkdktk0Guq"s wg"vggo qu"j q{ . "wp"gzegpvg"tgrcekp"eqp"rc"i gpvg"fg"UO CVC."o a"u"cm" f g"s wg"ecf c" wpq"gpvpgf g" { "tgeqpqeg" f g"s wg"tgr tgupe"kpvt gugu" f kwpvqu"s wg"c"xgegu"uqp"eqp"vcr wguqu."r gtq" f qpf g" f g"c"r qeq"gn"UO CVC"xc"gpvpgf kpf q"s wg"Vq{ qvc"gu" f hgtgpvg"cn"tgug" f g"rcu"vgt o kpcgu" { "s wg"gn"gur "fkwf g" rc"eqo r c° "p"gu"wp"gur "fkwf g"eqqr gtcekp" { "pq" f g"eqphtppcekp" *tgewr gtcf q" f g" F qrgpurn{ . "4234-0" "

Cf go a u" f g" r" tgf weekp" f g" eququ" { " f g" r" ukvqp"p" eqp" gn" ukpf kecq." qvtq" hcevt" f gvtgto kpcpv" f gucecf q"r qt" rqu" glgewkxqu"r ctc" mgxct" c" ecdq" r" co r rkecekp" dclq" gn" r tq{ geq" K0 X" hwg" gn" qdlgkxq" f g" kpvpgvt" cktct" c" r" go r tgu" f g" rqu" xckxpgu" f gn" ekem" geqp»o leq" cti gpvqp0" Cu" r" r" f ktgevtc" f g" Hkpcp| cu" uqukpg" s wg" "excluimos las cuestiones macro (problemas de volatilidad del tipo de cambio y competencia internacional) y seteamos lo que se llama "Cost Obeya", que es sala de visualización en japonés, donde se pone un referente de cada área en un equipo para trabajar en la reducción de costos al nivel de Tailandia" *K tqhgukqpcn "43 15 4244-0"

F cf cu"rcu"ectcevt"p"kecu" f g"rc"ecf gpc"i mdcn" f g"xcmq"gp"rc" kpf wwtkc"cwqo qvtk " /gp"rc" s wg" { c"pq"ug"ewpvc"eqp" kpf wwtkc" kpvgi tcf cu" c" plxgn"pcekqpcn"ukpq"eqp"wp"r qtekp" cnc" f g" cwqr ctvgu"ko r qtvcf cu" r" r" Àlec" hqto c" f g" gzenkt" rcu" ðewgukqpgu"o cetqö"r ctc"wp" vgt o kpcn" cwqo qvtk "gp" Cti gpvkc" gtc" ugt" uwr gtcxkctk"eqo gtekm gpvg"r ctc"eqpvt"eqp" rqu" f »rc"tgu" pgeguctku"r ctc"rcu"ko r qtvekpqu" f g"r ctvgu" { "r kgl cu0:4"Vcn"eqo q"ug"xkq"gp"gn" Ecr "wru"4."guvq"

3: 4"Rqt"wp"rcf q."guvq"gu"o qpkqtgcf q"r qt"gn"O kpkngtkq" f g"Rtqf weekp" c"r ctvt" f gn"pvgteco dlq"eqo gtekrleqp"Dtcukn" f g"ecf c"go r tgu" lpuetk r c"gp"gn" T2 i ko gp"Cwqo qvtk " f g"o qf q"cn" s wg"rcu"go r tgucu" s wg"pq"ewo r npp"eqp"gn"xcmt" r tqveqrc" f gn"hgz" r cewf q" f gdt"p"p"ugt" r gpcf cu"eqp"o wncu"ceqt f gu" c"rc" r2 tf kf c" f g"rcu"r tghgtgpekuc"tcepgn"t"ku" *xgt" Ecr "wru"4-0Rgtq."r qt"qvtq"rcf q."gzkngp"b gecpkuo qu"lphqto cgu" c"r ctvt" f g" hqu"ewcrgu"rcu"cwqt kf cf gu"guvcrgu" r gto ksp"o c{ qt" hgzkdkkf cf "r ctc"rc"ko r qtvekp" f g"r ctvgu" { "xgj "ewru" c"rcu"ht o cu"eqp"o glqtgu"tguwncf qu"gp"uwu" drcxp| cu"eqo gtekrig0" Gp" gung" ugpvkf q." I wuxq" Ucn"pau." f ktgevxq" f g" VCUC" f guf g"3; ; 8" { " r tgukf gpvg" f g" r" eqo r c° "p" f guf g"4244"uqukpg" s wg"guvc" gwtcvgi kc"ug"r rcpvg" f guf g"gn"r tkpek kq" { "s wg" "por supuesto, en los últimos años, donde la Argentina ha tenido restricciones de divisas, ese modelo compensado y superavitario ha sido claramente un modelo exitoso" *O qvt3."42 134 4244-0"

hmg" wp" r tqdrigo c" j kx»tleq" gp" gn" ugevqt" cwqo qvqt" f qo 2 uleq" { " f c" ewgpw" f gn" r rcp" f g" uwvwpvdkrkf cf " mecn' s wg" Vq{ qvc" r rcpvg»" f guf g" gn' kplekq" f g" uwu" qr gtcekqpgu" gp" gn' r c¶u." f gpqvcpf q" uw' r rpklecek»p" c" rcti q' r rcl q. "wpc" r ctvg" gut wewtcnf g' r c" *estrategia empresarial* f g" r c" hto c' lcr qp guc" gp" vqf q" gn' o wpf q. " r r cuo cf c" gp" r c" tgcirkf cf " cti gpvkpc0"

F g" guvg" o qf q. " ugi Àp" rqu" glgewkxqu" f g" r c" go r tguc. " Vq{ qvc" Cti gpvkpc" ug" r tqr wuq" o cpvpgt" wpc" drcrp| c" eqo gtekn' r qukkxc" f guf g" uw" kplekq0' Guvc" gut cvgi kc. " c" uw" xgl . " guwxq" uwvwpvc" f c" gp" wp" pgi qekq" r rcpvgcf q" gp" dcug" c" r c" gzt vtcek»p<" r tko gtq" c" Dtcukn" { " nvgi q" ceegf kqpf q" c" pwxqu" o gtecf qu0Hcdkqr\ cpf cnc| kpk' i gtgpvg' i gpgtcnf g' Hkpcp| cu' f guf g' 4239. " uqukpg' s wg" " *Toyota define una estrategia global y vino a apostar por el crecimiento del país, no importa el Gobierno que sea, lo que significa aportar exportaciones para mantener la planta de Brasil y poder completar el line up de productos con los que produce el país vecino en base a una balanza comercial positiva* " " K tqhgukqpcn" 43 15 14244+0"

Cn' t gur gevq. " Cp¶| dcn' Dqtf gtgu' tgo ctec. "

"

Nc" gut cvgi kc" gp" gn' O gtequw' hmg" guvdrgegt' r tqf wvqu' eqo r rgo gpvctkqu0' Dtcukn' j ceg" gn' Eqt qmc= " pquqvtqu" j cego qu' h' J kmz0F gpvtq' f g' hqu' cp' r kuku' s wg' j leko qu' f g' r cu' f kxkpcu' r tqr wvqu' s wg' ug' b cpglctqp' vgp¶co qu" egtq" lo r cevq' pgi vwxq0' Qdxkco gpvg. " c" plx gn' o wpf kcn' Vq{ qvc" guv" gp" hcxqt" f gn' eqo gteq" r kdtg" gpvtg" rqu" r c¶gu. " cvpfp kqpf q" c" r cu' pgegukf cf gu' r wvwcrgu' s wg' r wgf g' j cdgt" gp" ecf c" tgi k»p" q" r c¶u0' P quqvtqu. " eqo q" r tkpek kq. " guvco qu" gp" hcxqt" f gn' r kdtg" eqo gteq" { " j cego qu' wpc" gut cvgi kc" f g' tcf lecek»p" f g' kpf wutkc" r ctc" s wg" ugc" r kdtg" eqo gteq. " r gtq" wco dlk' p" drcrpegcf q. " gp" f qpf g" co dcu' r ctvqu' r wgf cp" xgt" rqu' dgpghlekqu" " Nc" P cek»p. " 5 14 14228+0"

"

" Cf go a u. ugi Àp" F cpkgn' J gttgtq. ""

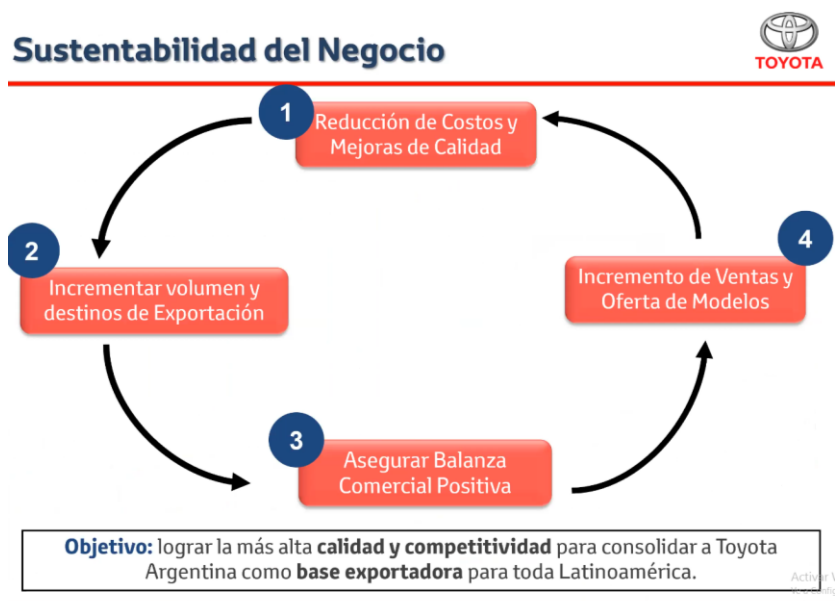
"

P wvutq" uwg° q" ukgo r tg" hmg" etgegt" { " eqpxgt vktqu" gp" gzt vtvcf qt gu0' a Rqt" s w² A' Rqt s wg" uk' xgu' r c" j kxqtkc" f g" Ncvkqco 2 tlec. " j cu' vgpkf q" wp" o qp»p" f g' etkuku. " gp" hqu' f kxkpcu' r c¶gu' f g' r c' tgi k»p0' Gpvqpegu' gn' xqno gp" f g" Cti gpvkpc" pq" cncrp| cdc" r ctc" j cegtpqu" uwvwpvdrigo. " vgp¶cu" s wg" kt" c" wp" xqno gp" o c{ qt. " { " r ctc" guq" vgp¶cu" s wg" gzt vtvt " ¶i + " Nc" kf gc" ukgo r tg" hmg" gpeqvctt" wp" drcrpeg" s wg" vg" j kkgug" kpf gr gpf kqpv" f gn' f » rct0' Guq" wco dlk' p" lo r rkecdc" c" w' ecf gpc" f g" xcnqt0' Rctc" ugt" kpf gr gpf kqpv" f gn' vkr q" f g" eco dlq" pgegukdcu' vgpvt" wp" eqpvkpf q" mecn' lo r qtvcpv" s wg" pq" f gr gpf kqtc" f gn' vkr q" f g" eco dlq. " { " wp" xqno gp" f g" gzt vtcek»p" i tcpf g0' Gpvqpegu. " uk' gn' f » rct' ug' f g' xcnwcdc" gp" Cti gpvkpc. " kdcu' c' i cpct' b wej q' b a u' eqp' r c" gzt vtcek»p. " hg' kdcu' c' r qf gt" r ci ct' o a u' c' wu' r tqxggf qtgu. " r qts wg" gp" tgcirkf cf " guvdcu' xgpf kqpf q" c" wp" f » rct' o wej q' o a u' ectq. " { " r qt' gn' qvtq" rcf q. " r qf ¶cu' j cegt" wp" f guewgpvq" gp" w' o gtecf q" mecn' r ctc" r qf gt" o cpvpgt" xqno gp. " { " r c' tgpvdkrkf cf " xgp¶c" f g' t kxc" f c" f gn' pgi qekq" f g" gzt vtcek»p" " F cpkgn' J gttgtq. " gpvtgxkuc" r gtuqpcn" 3 19 14244+0""

"

C'lw'xgl . 'gp'rc'eqo r ctcek'p'eqp'qtqu'r c'f'gu'eqp'r rcpvcu'kpf wutlcrngu'f g'Vq{ qvc.'F cplgn' J gttgtq'qu'kpg's wg''esta planificación de ser sustentable y superavitario no se da en todas las plantas de Toyota. Es más particular de acá. Tampoco en Sudáfrica y Tailandia, que son países más parecidos, no es tan así''''F cplgn'J gttgtq.'gpvtgxkuc'r gtuqpcn'3 19 14244-0'Ugi Àp'gn' glgewkxq.'uk'dkpg'gu'ekgtvq's wg'j c{ 'wpc'hkquqhf'c'Vq{ qvc's wg'ceqo r c'º ».'j wdq'wp'hwgtvg'r guq'f g' rcu'i gukqpgu'rqecrgu'c's wg''para un japonés es muy difícil entender el negocio de Argentina (...) en las EM tiene que ver también con la impronta que le pongan en las filiales. Cuánto vayan a pelear adentro de la organización''''F cplgn'J gttgtq.'gpvtgxkuc'r gtuqpcn'3 19 14244-0' Gp'gug'ugp'wf q.'Hcdkrc'\ cpf crcl kpk'qu'kpg's wg'gn'ugetgvq'r ctc'o cpvpgt'wpc'dwpc'tgrcek'p' eqp'rc'ecuc'o cxtk'gu''mantenerlos informados, los ciclos siempre se repiten, tanto en manejo de divisas como en restricción a las importaciones, siempre nos adelantamos. Les avisamos qué está pasando y al mismo tiempo le damos la solución. Esta forma de actuar genera una relación de confianza, además de estar siempre supervisados por un expatriado que trabaja cerca de la Argentina y Brasil para hacer de "puente''''K tqhgukqpcn'43 15 14244-0'

Imagen IV-1 - Modelo de negocio de TASA

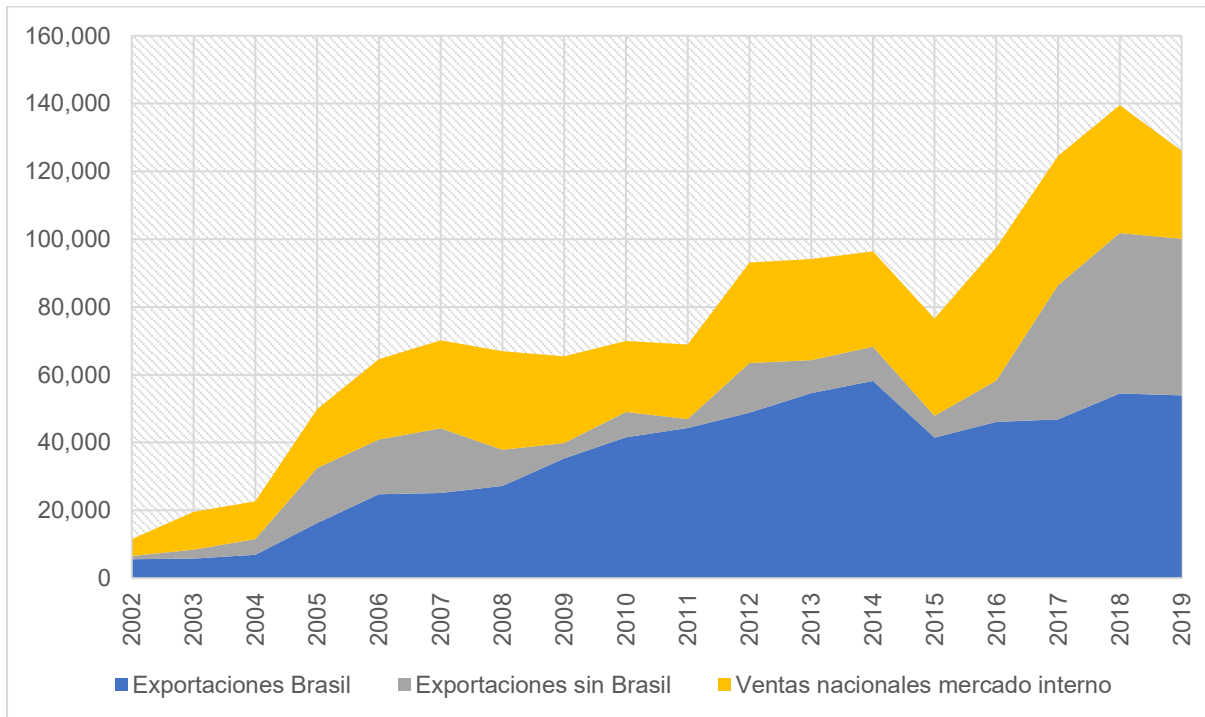


Hwpgv<f qewo gpv'kpgtpq'f g'VCUC'ceegf kf q'gp'42420'

F g'gug'o qf q.'gp'dcug'c'f lej c'guxtvgi kc'c'c'r ctvt'f g'rcu'kpxgtukqpgu'f gnr tq{ gevq'IO X.' Vq{ qvc'r cu'f g'r tqf wekt'3; 677'wplf cf gu'gp'4226'c'68884'gp'4227'{'87022'gp'4228.'f g'rcu' ewcrgu'gn'84' 'hwg'r ctc'gzt qtcel'p'xgt'I t'a hq'KX/6+0F gpvtq'f g'guqu'f gukqqu'f g'gzt qtcel'p' ug'uwo ctqp'pwgxqu'r c'f'gu.'crgu'eqo q'J qpf wcu.'Rcpco a.'P lectci wc.'Tgr Àdrtec'F qo kplecpc''

{'Eqwv'Tkcc.'gptg'hqu'b' a u'ko r qtvcpvgo'0Cf go a u.'cwo gpvctqp'eqpukf gtcdrgo gpvg'hqu'gpx'qu'c' Ejj kg.'O'z leq.'Gn'Ucxcfc qt' {"I wcvgo crc'Ukp" go dcti q.'gn'i twguq'f g'rcu' g'zr qtvcckp'gu'ug' eqpegpvt'»'gp'Dtcukr'0"

Gráfico IV-4 - Exportaciones por destino y ventas de vehículos nacionales en el mercado interno de Toyota Argentina (unidades) (2002-2019)



Hwpgv'<gndqtckep'r tqr kc'gp'dcug'c'CF GHC'{"dcrpegu'0"

" P q"qduvcpv'c'r guct'f g'guvg'gzkquq'f gugo r g° q'r tqf wvxxq'{"eqo gtekn'j cuw'4228." f guf g'guvg'c° q'rc'htc c'ug'guvpe»'gp'rc'r tqf week»p'f g'87022'xgj 'fwmqu'cpwrcgu'{'ug'r gtf lgtqp" i tcp'r ctvg'f g'hqu'b gtecf qu'f g'g'zr qtvcckp'f g'hqu'c° qu'r t'g'x'k'q.'s wg'go r gl'ctqp'c'ugt'cdcuwgek'f qu' r qt'Vckrpf kc.'o k'pvtcu'rcu'g'zr qtvcckp'gu'f g'VCUC'ug'eqpegpvtctqp'ecf c'xg| "o a u'gp'Dtcukr' n'gi c'pf q'c" g'zr r'lect' gn'; 2' " f g'rcu' o kuo cu' gp'422; " *xgt' I t° h'eq' KK/6-0' Ugi Àp' T'lectf q' Rki pcpgrk' u'get'g'v'ct'k'q' i gp'gt'cn'f gn'UO CVC'f guf g'gn'4234. " "Toyota cuando entra al país entra de la mano de Borderes y se llegó hasta 60 mil unidades. Se había quedado en una zona de confort que se había estancado en 60 mil unidades. Podíamos más, pero la misma gente desde arriba hacia abajo te decían "si con esto estamos bien" " *T'lectf q' Rki pcpgrk' g'pvt'g'x'k'w' r gtuqpc'n': 04244-0' Guv'c' uw' xg|. "ug'eqo r ngo gpv»'eqp'wpc'r q'f'f'lec'f g'f'k'v'k'd'w'ek»p'f g' f'k'k'f'gp'f'g'rc'go r t'guc'gpvt'g'4228' {"4232.'hq's wg'ko r r'le»'wpc'o gpqt'lp'x'g't'uk»p'gp'rc'r r'pvc' r'q'ec'n'f w'cp'v'g'gu'qu'c° qu' *xgt' I t° h'eq' KK/7-0'

" Guv'gvr c'f g'gucpeco kpvq'r tqf wekxq. 'eqo gtekn'g'kpxgtuqt'ewro kp»'c'hkpgu'f g'4232." ewcpf q'gn'r t gulf gpvg' Cp'f' dcn' Dqtf gtgu'hwg'f gur gf kf q'c'r ct vk'f g'f gpwpeku'f g'kt gi wrctkf cf gu' gp'gn'o cpglq'f g'rcu'hkpcp| cu'cn'kpvgtkqt'f g'VCUC0Guq'i gpgt»'rc'kpvgtxgpek»p'f g'rc'ecuc'o cvtk' f g'VO E"gp'rc'hkcn'mqecr0'Guvg'gr kuqf kq'ug'o cpgl»'gp'ugetgvq'{"rc'kphqto cel»p'ecuk'pq'ektew»" gp'rc'r tgpuc0'Gp" guvg'o cteq." VO E" eqo gp| »" c" tgrnk' ct" r tqeguqu" f g" eqpvtqri' {" cwf kqt'cu' f kt gevco gpvg'f guf g'Lcr »p. 'ucn'gcpf q'rc'ecf gpc'f g'o cpf q'f gn'O gtequw. 'f gpqvcpf q'rc'i tcxgf cf " f g'rc'ukwcek»p'»F cplgn'J gttgtq. "gptgxkxrc'r gtuqpcn"3 19 4244-0"

Cu'f'ug'r wgf g'xgt's wg. "c'r guct'f gn'gzkxqu'f gugo r g'o q'kplekn'f g'rc'hkto c. 'f cf q'r qt'rc" r qukek»p'gp'rc'gutwewtc'o wnkpcckqpcn'{"gn'cwo gpvq'f g'rc'r tqf wek»p'mqecr'eqp'rc'glgewek»p' f gn'r tq{ gevq" KO X. "rc'cf o kpkmtcek»p'f g'rc'i gtgpek"mqecn" eqo q'r ctvg'f g'rc' *incrustación nacional*"f g'guc'hkcn'wxq'wp'r cr gnko r qtvcpv'gp'gn'gucpeco kpvq'f g'gug'r gt'qf q. 'f gpqvcpf q' wco dR'p'uw'ko r qtvcpek'gp'rc'gutcvgi kc'{"f gugo r g'o q'f g'rc'go r tguc0' Cf go ^ u. 'rcu'cwqtkf cf gu' mqecrgu'hwgtqp'f gur rc| cf cu'r qt'f gpwpeku'f g'o crkgtucek»p'f g'hqpf qu. 'f cpf q'ewgpvc'f gn'r guq'f g' rcu'cf o kpkmtcekqpgu'mqecrgu'f g'rcu'hkcn'rgu'f g'GO u'{"s wg'rcu'f kt gevku'f g'rc'ecuc'o cvtk' 'pq' uqp' f kt gevco gpvg'cr rkecf cu'gp'rcu'r c'f'ug'u'tgegr vqt gu'f g'guc'u'hkto cu0' "

4.5 - Nuevas capacidades gerenciales y la expansión de TMC en América Latina

C'tc'f' f g'rc'ucnk' c'f g'Dqtf gtgu. 'F cplgn'J gttgtq. 's wg'j cuw'gug'o qo gpvq'ug'f gugo r g'o cdc" eqo q'f kt gevqt'f g'Eqpvcdkf cf {"Hkpcp| cu. 'kphqto cvkqp'Vgej pqmri kgu'»K+{"Tgewtuqu'J wo cpqu' f g'VCUC."cuwo g'rc'r t gulf gpek0'Gn'glgewkxq"eqo gpw's wg'cpvg'rc'kpvgtxgpek»p'f g'rc'hkcn' cti gpvpc'j keltqp'wp'""*plan que se llamó 90+90. En 90 días revisamos todos los esquemas de control con un auditor independiente, reportándole a Japón. Y después otros 90 días para implementar sistemas de control super estrictos. Y ahí recuperamos la confianza*""»F cplgn' J gttgtq. "gptgxkxrc'r gtuqpcn"3 19 4244-0' Cf go ^ u. "rc'pwxc'cf o kpkmtcek»p'f g'rc'go r tguc"ug" r tqr wuq"cwogpvt"rc'ecr celf cf "f g'r tqf wek»p."s wg"ug"j cd'c'o cpvgpkf q'gp'ctf gf gf qt'f g'rcu' 87022'wpkf cf gu'hdtkcf cu'cpwcm gpvg.'cwps wg'ug'o gpekqpcdc's wg'gzkx'f'f go cpf c'whkelpvg" r ctc"cdutdgt"o ^ u" xgj 'ewnu0'Ugi Àp" Tlectf q"Rki pcpgnk" "*en Toyota cambia la dirección, aparece Herrero con una visión totalmente distinta. Empezamos a crecer, fuimos tres veces a Japón*""»Tlectf q"Rki pcpgnk"gpv'gxlkxrc'r gtuqpcn": 19 4244-0

Uki wkpq'f c'F cplgn'J gttgtq. 'gn'r tqeguq'r ctc'urkckct'rcu'pwgxcu'kpxgtukqpgu'{"cwo gpvt" rc'ecr celf cf "f g'r tqf wek»p'pcek»'f guf g'rc'hkcn'mqecr'{"pq'f guf g'rc'ecuc'o cvtk'. "g'ko r rke»'wpc" ctf w'pgi qekcek»p'eqp'rcu'qhlekpcu'egpvtcrgu0'Gn'glgewkxq"uqukpgg's wg"ug"ng'r kf k»"c"rc'ecuc" o cvtk' <

"

Wp"xqvq"fg"eqphkcp| c0F glco g"lpvpxct"r cuct"fg"82"c"; 2'o kl'wplf cf gu'r tqf wekf cu'eqp"wp"t gkpxgtukp"fg" tgewtuqu'r tqr kqu'i gpgtcf qu'gp"Cti gpvpc"{"hwpf co gpvcm gpvg."eqp"wp"i tcp"cwogp"q"fg"o cpq"fg"qdtc0UK" mgi q" c"rcu"; 2'o kn"fkuewko qu"rc"lpxgtukp"pgeguclt"r ctc"kc"wp"r tqf weksp"fg"352"o kl'wplf cf gu"{" vgepklect"rc"r rpxvc0Chqt wpcf co gpvg."pqu"fglctqp"go r tgpfgt"gu"gzr cpukp"c"; 2'o kl'wplf cf gu"{"ewcpf q" mji tco qu'gug"qdlgkxq"hwko qu"r gf k"rc"lpxgtukp"i tcpf g"O kulp"Rtqf wekxc."3: 194244+0

"

F g"guvg"o qf q."gp"4234"rc"htc c"mji t>"hcdtlect"; 2022"wpkf cf gu"gp"Cti gpvpc0'Guvg" kpetgo gpvq"ug"fkq"vco dl2p"eqp"rc"ucrkf c"fg"wp"o qf gm"eqp"cri wpu"eco dlqu"fg"rc"J knwz." ecvcmi cf qu"eqo q"oDki "O clqt"Ej cpi go"*xgt"Vcdrc"KX/4+0'C"uw"xgl."c"r ctvt"fg"guvg"co q"rc" go r tgu"mgi »"c"pwgqu"o gtecf qu"ko r qtvcpgu."mgi q"fg"ewctq"co qu'fg"cmc"eqpegpvtcekp"fg" rcu"gzr qtcekppgu"gp"Dtcukl"xgt I t^a hleq"KX/6+0'Vcn'gu'gnlecuq"fg'E qmjo dlk"eqp"908: : "wpkf cf gu." cnls wg"ug"ig"gzr qtvcde"r qt'r tko gtc"xgl."{"RgtA"4053+{"Ej kg"97; +.s wg'ug'igu"xqm"lc"gzr qtvt" mgi q"fg"ewctq"co qu'ukp"j cegtm"xgt I t^a hleq"KX/: +0"

Cuko kuo q."eqo q"eqpugewgepk"fg'nko r wnuq"r kpgtq"fg"Vq{qvc"{"uw"eco kppgc"J knwz." f wcpvg"guqu"co qu"Cti gpvpc"eqo kpl| c"chckp| ctug"eqo q"gn'hub"fg"r tqf weksp"fg"r kni'wru" o gfkpcu"s wg"ug"fguetkdk"gp"gn'Ecr "wru"40'Gp"r tko gt"mi ct."c"r ctvt"fg"gn'4232"ug"eqo gp| »"c" r tqf wek"rc"Xqmuy ci gp"Co ctqm"eqphqto cpf q"c"Cti gpvpc"eqo q"Apkq"egpvt"o cpwcewtgtq" c"plxgn'o wpl kn'fg"fkj q"r tqf weq"{"eqp"wp"qtkgpvcekp"gzr qtvcf qtc."r tlpekr cm gpvg"j cek" Co²tlec'Ncvpc"GrO wpl q."3944232+0: 5'F g"guvg"o qf q."Xqmuy ci gp"eqpegpvt»"uw'r tqf weksp" gp"gn'r c"fu"gp"mu"o qf gmqu"Co ctqm"{"Uwcp."3: 6'cf go^a u'fg"rcu'eclcu"fg"tcpuo kulp"gp"E»tf qdc0"

Gp"ugi wpl q"mi ct."gp"4234"Hqtf"rcp| »"uw'pwgxc"xgtukp"fg"rc"Tcpig t."r tko gt"xgj "fwru" fg"o qf gm"i mden's wg"wkkl cdc"rc"o kuo c"r r vchqto c"r ctc"ugt"r tqf wekf q"gp"fg"knkpcu'r ctvgu"fg"n' o wpl q0Cn'ki wcn's wg"rc"J knwz."rc"Hqtf"Tcpig t"gtc"r tqf wekf c"gp"Vckrpf k"{"Uw^a hlec"eqp"wp" r r vchqto c"gp"eqo Ap."{"uw"xgtukp"cti gpvpc"guvdc"qtkgpvfc"r tlpekr cm gpvg"c"cdcuvggt"gn' o gtecf q"rc"wpqco gtlecpq"nc"P cekp."4194234="kRtqhukqpcn"4194234+0'Cu"fg"guvg"co q"

^{3: 5}Nwgi q"guvg"o qf gm"hwg"r tqf wekf q"vco dl2p"gp"Crjo cplc"j cuvc"4242"{"gp"Gewf qt"fg"guvg"423: "j cuvc"42420'Guv" hwg"rc"r tko gtc"r kni'wru"fg"kg"o cf c"r qt"Xqmuy ci gp0Ukp"go dci q."c"r guct"fg"gn'z kq"fg"rc"Xqmuy ci gp"Co ctqm"gp"gn' o gtecf q"cti gpvpc"{"fg"uwu"lo r qtvcpgu"gzr qtcekppgu."guv"uqrgf cf"cn'lpvgtkt"fg"Xqmuy ci gp"i mden'ig"lwi »"gp" eqpvtc"cn'o qf gm"{"c"rc"bur gekrk cekp"fg"rc"htc"ncti gpvpc"fg"Xqmuy ci gp"gp"Light Commercial Vehicles"NEXu0' Rtc"eqo r ctvt"eququ"fg"gucltqm"fg"r tqf weq"{"r tqxgej ct'geppqo "cu"fg"guv"{"c"rcpeg."Xqmuy ci gp"ig"egf k" rc"r tqf weksp"fg"rc"pwgxc"xgtukp"fg"rc"Co ctqm"b"Hqtf."s wg"rc"l'gcrk ct^a "gp"dcug"rc"r r vchqto c"fg"rc"pwgxc"Tcpig t= egukp"s wg"ug"fg"lq"gp"gn'o cteq"fg"wp"eqpxgplq"i mden'fg"crepeg"o^a u'i gpgtcl'gvtg"co dcu'cwqo qvtlegu'cpwpekf q" c"o gfkcf qu'fg"gn'4242"b"Hqtf."32184242+0C"uw"xgl."gu"lpvgtgucpv"fg"guvct"s wg"guvg"pwgxc"xgj "fwru"gu"fg"kg"o cf q"gp" Cwvctrc."fg"ppl g"Hqtf"p"q"vkgp"wp"r rpxc"o cpwcewtgtc"fg"gdlf q"lc"uwelgtg"gp"4238"r gtq"l"fw"egpvtq"fg"lpi gplgt"lc" *Ectu"l wfg."461614244+0

^{3: 6}Gp"423: "ug"hpckl c"rc"r tqf weksp"fg"Uwcp"{"gp"4242"ug"eqo kpl| c"eqp"rc"htc"lecekp"fg"uw'r tko gtc"UWx."gn' o qf gm"Vcu0'

Hqtf "f gf le»"rc"r tqf week»p"fg"uw"r rcpvc"gp"Rcej geq"c"uwu"o qf grqu"Tcpig"t{" "Hqewu":⁷"Guv" eco kq"eqo gp| cf q"r qt "Vq{ qc"{" 'ugi wkf q"r qt "Xqmuy ci gp"{" Hqtf "xc"b"o ctect"rc"gur gekrk k cel»p" cti gpvpc"gp"r leni"wr u"o gf kpcu"s wg."eqp"rc"r quvgtkq"kpvtqf week»p"fg"rqu"o qf grqu"Pkucp" Hqpvgt"{" "Tgpcwn"Crcunep"ug"xc"c"r tqhwpfk ct0F g"guv"o qf q."rc"r tqf week»p"fg"xgj "ewrqu" eqo gtekrqu"hxkcpqu"gp"Co ²tlec"Ncvpc"eqo gp| »"c"fk kxf ktug"gp"hwpek»p"fg"uwu"ugi o gpvqu"xgt" Vcdrc"K/5+0Cn'tgur gevq."F cplgn"J gttgtq"quvgt"p"“a veces me siento un poco solo (...) Pero ahora están todos viniendo a producir pick ups, de modo que algo bueno habremos hecho. En pocos años la Argentina va a producir 400.000 camionetas. Y cuando un país produce 400.000 pick ups, olvidate de ir a producirla a otro país de la región” *Entp."38154239+0

Tabla IV-3 - Modelos de pick ups vigentes y países de producción (2020)

Tipo de pick up	Marca	Modelo	País de producción en AL
Chicas	Chevrolet	Montana	Brasil
	Ford	Maverick	México
	Fiat	Toro	Brasil
		Strada	Brasil
	Renault	Duster Oroch	Brasil
	Volkswagen	Saveiro	Brasil
Medianas	Chevrolet	S-10	Brasil
	Ford	Ranger	Argentina
	Honda	Ridgeline	-
	Isuzu	D-Max	-
	Mitsubishi	L200	Brasil
	Nissan	NP300	México
		Frontier	Brasil (hasta 2015) Argentina (desde 2018)
	Renault	Alaskan	Argentina
	Toyota	Hilux	Argentina
		Tacoma	México
	Volkswagen	Amarok	Argentina
Grandes/Full size	Chevrolet	Silverado	México
	Ford	F-150	-
	Dodge (Stellantis)	Ram	México
	GMC (GM)	Sierra	México
	Nissan	Titan	-
	Toyota	Tundra	-

Hqpvgt"grndqtcel»p"r tqr k"gp"dcug"c"CF GHC."CP HCXGC."CO IC"{" "dkrkqi tchfc"gur gekrk cf c0'

^{3, 7}"Gp"423; "ug"hpck c"rc"r tqf week»p"fg"rqu"o qf grqu"Tcpig"t{" "Hqewu"{" "u"n"ug"eqpegpvc"gp"rc"r tqf week»p"fg"rqu"o qf grqu"Pkucp" Hqpvgt"{" "Tgpcwn"Crcunep"ug"xc"c"r tqhwpfk ct0F g"guv"o qf q."rc"r tqf week»p"fg"xgj "ewrqu" eqo gtekrqu"hxkcpqu"gp"Co ²tlec"Ncvpc"eqo gp| »"c"fk kxf ktug"gp"hwpek»p"fg"uwu"ugi o gpvqu"xgt" Vcdrc"K/5+0Cn'tgur gevq."F cplgn"J gttgtq"quvgt"p"“a veces me siento un poco solo (...) Pero ahora están todos viniendo a producir pick ups, de modo que algo bueno habremos hecho. En pocos años la Argentina va a producir 400.000 camionetas. Y cuando un país produce 400.000 pick ups, olvidate de ir a producirla a otro país de la región” *Entp."38154239+0

Cf go ^{3;8} u. "gung" cwo gpvq "gp" r' r tqf week p' cti gpvpc "ug" f kq "eqpeqo kcpvgo gpvg" eqp "qvtq" j kq' r ctc "rc" go r tguv "gp" Dtcukn "rc" kpcwi wtcek p' f g' uw' vgtgct "wplk cf "f g' hcdtkecel p. "gunc" xgl "gp" Uqtqecdc "Ucp" Rcdm+ "gpecti cf c' f g' r tqf wek' "qu" eqo r cevu' Gvku "gp" uwu' xgtukqpgu "hatchback" {"ugf^a p0: ⁸ "F g' gung" o qf q. "Vq{ qvc "O gtequwt "gpv" > "gp" gn'o gtecf q' f g' qu' cwqu' r gs wg^o qu" gp" gn' ewcn' pq "gunc" dc' r tguv "gp" j cuv' "gug" o qo gpvq0 Gunc' co r rkecel p' f g' Vq{ qvc "O gtequwt "ug" gpo ctec" gp' rc" gzi cpuk p' f g' VO E "gp" qu' o gtecf qu" gp' f gucttqm "nwg" i q' f g' r' etkuku "hpcpekgtc" i mdcn' f g' 422: /422; . "cn' eqo q' ug" xkq "gp" gn' ecr "jwq" cpvgtkqt0 Cn' t gur gevq. "F cpkgn' J gttgtq "uquvq" "s wg" "vemos que para la casa matriz la región Mercosur ha tomado otra dimensión. Antes éramos una afiliada más, ahora la zona tiene otro potencial, y en especial si se tiene en cuenta que hoy EEUU tiene un crecimiento restringido" *Ectu. 71: 14233-0Rqt "gung" b qvwxq. "gp" 4235 "Vq{ qvc" etg > "rc" f kxkuk p' f g' Co ² tlec "Ncvpc" {"gn' Ectkdg" {"r qukekqp > "cn' guv' f qwplk gpug' Uvxxg' U0Cpi gm' eqo q' EGQ' f g' f lej c' tgi k p. "s wkgp "uquvq" "s wg" <

"

Eqp "qu" c^o qu. "Vq{ qvc "ug" qtkgp > "c" qu' r c' "gu" f gucttqm f qu. {"gp" qu' Anko qu' vgo r qu' f guge "eqpxgtvtug" gp" wpc" eqo r c^o "c" i mdcn' Cj qtc "ug" gu⁹ "hceck" cpf q' gp' o gtecf qu" gp' f gucttqm "eqo q' rc" Cti gpvpc" {"Dtcukn' Rctc" o qutct' p wgt q' eqo r tqo kuq. "Cnk" "Vq{ qf c. "p wgt q' r tguv gpvg. "o g' f guki p > "eqo q' EGQ' f g' Co ² tlec" Ncvpc" {"gn' Ectkdg0 Gpvqpegu. "r qf go qu' vgo ct' o ^a u' f gekukqpgu' c' p kxgn' mecn' {"j cegtm' f g' o qf q' o ^a u' t^a r kf q' *Nc' P cel p. 441; 14235-0'

"

F g' gung' o qf q. "gp" Cti gpvpc. "nwg" i q' f gn' cwo gpvq "gp" r' r tqf week p' c' rcp | cpf q' rcu'; 2' o kn' wplk cf gu. "qu' guhwt | qu' ug' eqpegv' ctqp "gp' eqpugi wkt' wpc' p wxc' lpxgtuk p' t² eqtf 'r ctc' cwo gpvct' c' Ap' o ^a u' rc' ecr cef cf "f g' r tqf week p" {"mgi ct' c' p w xqu" o gtecf qu' rc' vqco gtecpqu' 0 Cu' | "qu" glgewkxqu' f g' VCUC" {"gn' UO CVC "hwtqp" gp' f kxkvcu' qecukqpgu' c' Lcr > p' r ctc' "kpkukkt" gp' gn' qvqi co kgpv' f g' f lej c' kpxgtuk p' 0 Tlectf q' Rki pcpgm' eqo gpvc' s wg <

"

^{3;8} Cf go ^a u. "kpuvcn" c' uw' crtgf gf qt' c' 34' r tqxggf qtgu' egpv' t' cgu' f g' rcu' ewcrgu' 8' f g' gnu' gtc' p' lcr qpgucu' follow-sourcing *Vq{ qvc "Vuwj q' "Ugg' n' cpf "Ueter. "Vq{ qvc "Dquj qmw' Rkmp' i vqp/ Pkr r qp' Ugg' n' I rcu. "Mcp' lknj. "Ucp' j + *Kwvwnk' gv' cn' 0' 4237 < 93 + 0 Ugi Ap' F cplgn' J gttgtq. "s wkgp "guwxq' c' ecti q' f gn' r tq { gevq' f g' r' hcdtkecel p' f gn' Gvku' gp' Dtcukn' ug' "kpv" > "j cegt' gp' rc' Cti gpvpc' r gtq' pq' r tqur gt > {"hpcm gpvg' ug' j k' q' gp' Uqtqecdc. "Ucp' Rcdm. "r qt' rc" f hgtgpek' gp' qu' lpegv' xqu' gz kugpv' gu' 0 Ugi Ap' gn' glgewkxq. "öcantes de reunirme con el gobernador de San Pablo, yo recibí todos los incentivos y beneficios fiscales que los estados brasileños le habían otorgado en el pasado a otras terminales. Cuando me junté con él, le llevé la listita completa. Él solamente me preguntó cuánta gente íbamos a contratar. Le contesté que unas dos mil personas. Me dijo: "Perfecto, te otorgo todos los beneficios de la lista que trajiste pero los vas a empezar a recibir el día que estén los dos mil trabajadores en planta". Y así fue. Nos dieron el valor del terreno, el valor de construcción de la planta, la infraestructura y la nivelación" *O kul p' Rtqf wvxc. 3: 19 14244-0 Guv' q' o cte > "vp' hwtg' v' lo r wuq' f g' r' "hkn' n' dtcukgtc" *xgt' I t^a hleq' 2/32' f gn' Cpgzq' Guv' f "hneq- "ulp' go dci q. "rc' r ct' v' k' cel p' f g' Vq{ qvc "gp" gn' v' cn' f g' r' "kpf wv' lc" cwqo qv' k' "dtcukg^o c' eqp' v' p > " ulgp' f q' o gpqt. "v' dle^a pf qug' f g' u' f g' Hlc' v' I O. "Xqmuy ci gp. "Tgp' cwn' {"J { wpl' ck' t' gur gev' xco gpvg' *xgt' I t^a hleq' 2/39' f gn' Cpgzq' Guv' f "hneq+0 Rqt' qvtq' rcf q. "rc' "hkn' n' xgp' g' q' r' pc' eqp' v' p > "eqp' i t' c' xgu' r tqdng' cu' ec' {gp' f q' ecf c' xgl' " o ^a u' uw' r tqf week p' nwg' i q' f g' 42280'

Vwxko qu'wpc'tgwplp'p'ercxg.'rc'Ànko c'tgwplp'gp'Lcr »p0Guvdc'vqf q'gnif kt gevqt kq'f'g'Vq { qvc.'{ 'gnir tguif gpvg'
f'g'Vq { qvc'c'pkxgnlpgt pcekqpcrif keg's wj' cd'fo qu'j gej q'o wej cu'equcu.'s wg'rc'r tqf weekp'ugi w'f' lwdkpgf q."
s wg'gn'o gtecf q'ugi w'f'f go cpf cpf q.'{ 's wg'vpg'f'p's wj' cegt'wpc'i tcp'kpxgtukp'f'g'w&u3Ø22'o kmppgu0Nq"
r qp'f'c'eqpukf gtcekp'f'gnif kt gevqt kq'0' "tguvdc'f'ghkpk's w&e'p'i ctepv& cdc'guvq0' "ukp'r qpgtqu'f'g'cewgtf q."
ngxcpvq'rc'o cpq"q" { "ngxcpvq'rc'o cpq"J gttgtq0' "gnir tguif gpvg'f'g'VO E'f'keg's wg.'uk'rc'go r tguv'cti gpvpc"
m"i ctepv& c" { "m"i ctepv& c" gn'ukpf kecq."uqmq'vpggo qu's wg'cr tqdct'rc" kpxgtukp"*Tlectf q"Rki pcpgnk"
gpvtgxkrc'r gtuqpcn': 194244+0'

"

Ugi Àp" F cpkgn' J gttgtq." guv" f go qutcekp" f g" xqmpvcf" vcpvq" f g" VCUC" eqo q" f gn'
UO CVC"gp'Lcr »p'hwg'f'gvto kpcpvg" { c"s wg" "eso para un japonés, que viene de una cultura
bastante verticalista y donde se resaltan los lazos de confianza, fue clave" "O kuxp'Rtqf wev&c."
3: 194244+0F g'guvg'o qf q."gp'ugr v&go dtg'f'g'4235."Vq { qvc' Cti gpvpc'cpwpek'wpc'kpxgtukp'f'g'
w&u: 22"o kmppgu'f'guvpc'f'c"rc"co r rcekp" f g"uw'r rcpv" f g" \ a tcv&0'Nc" kpxgtukp"/rc"o a u"
ko r qtvcpv" j cuv" gpvpegu'tgcrk' cf c" r qt" wpc" cwqo qvtk " gp" gn' r c'w'v' vpg'f'c' eqo q" qdlgv&xq"
kpetgo gpvt'rc"r tqf weekp" f g"; 4Ø22" c" 362Ø22" xgj 'f'wqu'cpwvngu" { "r qulekqpc'c"rc" h&rcn'
cti gpvpc'eqo q'dcug'f'g'r tqf weekp" { "gZR qtvekp'f'g'mu'o qf gnqu"J kwz" { "UY 6'r ctc"Co 2 tlec"
Ncvpc."i cpcpf q'pwgxqu"o gtecf qu"*Cwqj kvqtkc."4242+0Cf go a u."guvg'f'gugo dquq"gtc'gn'o a u"
i tcpf'g'f'g'VO E'hwgi q'f'g'rc'etkuk'hkpcpegtc'bo wpf kcnf'g'422: "Vq { qvc'I m&dcn": 15 14238+0'

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r tqf wev&qu'f'g'gpv& cf gu'hkpcpegtcu'pcekqpcngu'r qt"&4Ø95"o kmppgu"*w&u477"o kmppgu'cn'vr q"
f'g'eco dlq'f'g'hkpgu'f'g'4236+0Gp"ugi wpf q'ni ct."v&gu'et² f kqu'f'gn'Hqpf q"r ctc"gn'F gucttqm"
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f'g'&822"o kmppgu'ecf c'wpq'gp'4236" { "4237"cr tqzko cf co gpv'w&u92"o kmppgu'ecf c'wpq'cn'vr q"
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vr q" f'g'eco dlq'f'gn'o gu'f'g'f'gugo dquq+*"Dcnpogu"VCUC."718 14237=: 18 14238+Ø: "Gp"vtegt"
ni ct."VCUC"ug'gpf gw'f' »"eqp"dcpequ"gz v&cpigtqu'r qt" w&u3; 2"o kmppgu0Rqt'Ànko q."rc"htc o"

3: 9" Guv'hqpf q'vpg'f'c'qu'qdlgv&xqu'f'g'<gn'qdlgv&xq'f'g'<ka'r gto kkt'wp'o c { qt'ceequq'cn'hkpcpeko kpvq="k&r tqo qxgt"
rc" kpxgtukp" { lq'gn'eqpuwo q="k&ke'eqpv&kdv&k'cn'f' gucttqm' f'g'rcu'ecf gpcu'f'g'xcmt'gp'ugevqtgu'gvtc² i lequ'r ctc'gn'
f' gucttqm'geqp»o leq" { "u&ekcn'f'gn'r c'f'j="kx'+eqpv&kdv&k'c'rc'r w&uvc'gp'o ctej c" { lq'gn'uquv&gpk'o kpvq'f'g'cev&kf'cf'gu'
{ lq'go r tguv'eqp'grx&cf q'eqpv&pk'f'q'v&epq»i leq."gvtc² i lecu'r ctc'gn'f' gucttqm'pcekqpcn'q"ko r qtvcpvu'r ctc'rc"
i gpvtcekp'f'g'bo c { qt'xcmt'ci tgi cf q'gp'rcu'geqpqo 'f'cu'tgi kqpcngu" F getgvq"828 14236+Ø"
3: "Nqu'r t² uco qu'hwgtqp'lpf'gr'gp'f'kpv&u'c'wp'r rc' | q'f'g'7"co qu'eqp"5"co qu'f'g'i tcekc'iqdtg'gn'ecr kcn'eqp'wpc'vcuc"
h&c'f'gn3; ' r ctc'mu'r tko gtqu"4"co qu" { "hwgi q'x&ctk&ng'eqp'wp'vqr'g'o 'pko q'f'g'36' { "wp'o a zko q'f'g'47' 0Guvqu"
et² f kqu'hwgtqp'ecpegr&cf qu'gp'uw'vqcr&f'cf "gp"423: 0'C"uw'xgl ."cwqrc'tv&rcu'r tqxggf'qtcu'f'g'Vq { qvc'co dl&p"
tgekldgtqp'et² f kqu'HQP F GCT."eqo q'ug'xgt³ gp'gn'r t>zk'o q'ecr 'fwqu0"

eqp»" eqp" r" hpcpekcep" f g" VO E" c" txc²u" f g" r" r quvgti cek»p" f gn" r ci q" f g" f kxf gpf qu." tglpxk v² pf qmqu"gp"r" r rcpv"»Dcrrpeg"VCUC."43 19 4236+0" : "

Cf go ^a u." r ctc" guv" co r rkecep" VCUC" ug" dgpghke»" eqp" gn" T²i ko gp" f g" Rtqo qek»p" kpf wwtkn"»Ng{ "P cekqpcn"320769+."eqp" gn" ewcn"ug"gzko "c" f gn" r ci q" f g" kfi tguqu" Dtwqu" r qt" rqu" cwo gpvqu" f g" r" hcewtcep" f g" r" r rcpv" r tqo qekqpcfc" »xgt" Vcdm" 2/; " f gn" Cpgzq" Guvcf " lueq+0" Guvqu" cr q{ qu" guvcrgu" ug" uwo cp" c" vpc" ugtkg" f g" r qn" Mecu" r Àdrlecu" { " f kur qulekqpcrgu" kpuvkekqpcrgu" s wg" Vq{ qvc" Cti gpvpc" wkkk »" gp" guvcu" f² ecf cu" { " r gto kgp" r gpuct" s wg. " uk'dkgp" gn" Guvcf q" cti gpvpc" pq" f kki k»" guv" r tqeguq" f g" gur gekrk cek»p" f g" r" r tqf wek»p" cwqo qvtk" f qo ² urlec. " r ctc" gn" ecuc" f g" r" hto c" lcr qpguc" u" ceqo r c° »" guv" f gucttqm" eqp" vpc" ugtkg" f g" o gf kf cu" f g" r tqo qek»p" { " cr q{ q0

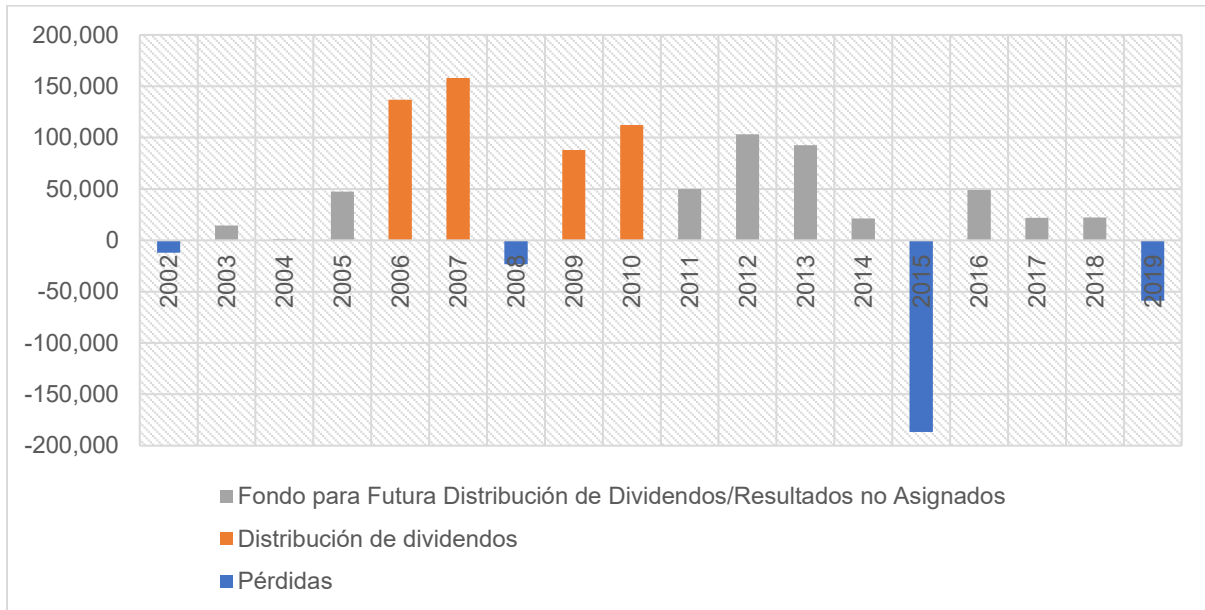
Tabla IV-4 - Inversiones de TASA (dólares corrientes) (1997-2019)

Años	Monto (u\$s)	Detalles
1997-98	150,000,000	Instalación.
2002	200,000,000	Ampliación planta proyecto IMV.
2006	15,000,000	Planta de estampado.
2006	4,000,000	Línea de ensamblaje de motores.
2007	12,300,000	Planta de pintura.
2007	10,000,000	Inyección de partes plásticas.
2010	127,000,000	Ampliación de la planta.
2013-2015	800,000,000	Tecnificación de la planta para producir 120.0000 unidades.
2016-2017	200,000,000	Incremento de la producción.
2018	80,000,000	Modernización de la planta.

Hwpgv<grdqtccep" r tqr k" gp" dcug" c" dcrpegu" tgr qt vgu" f g" uwvpgvdkkf cf " { " qv cu" hwpgvu" r tko ctlcu'

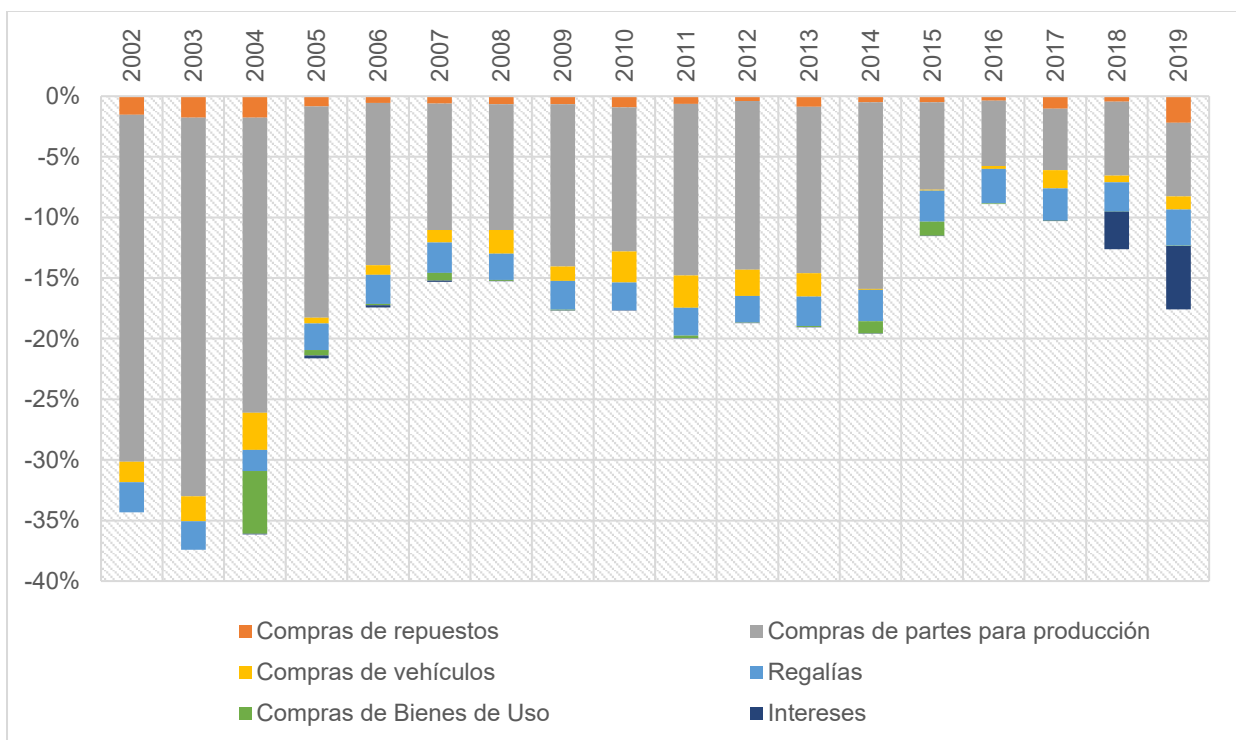
³: "Gp"4238"VCUC" eqpvtclq" vpc" f gwf c" eqp" r" ecuc" o cvk" f g" &40 63" o knppgu" »v&u3: 2" o knppgu" cn" vkr q" f g" eco dlq" f gn" lo qo gpvq" f g" f gugo dqm" +»Dcrrpeg"VCUC."48 18 4239+0

Gráfico IV-5 - Resultados netos de cada ejercicio de TASA y su utilización (miles de dólares) (2002-2019)



Hvpgv<gndqtck>p'r tqr kc'gp'dcug'c'dcæpegu'VCUC'{"kr q'f'g'eco dlq'f'gn'DETC'gp'n'hgej c'f'g'ekgtg'f'g'ecf c' glgtelekq0'

Gráfico IV-6 - Principales operaciones de TASA con TMC como porcentaje de las ventas totales de cada año (porcentajes) (2002-2019)



Hvpgv<gndqtck>p'r tqr kc'gp'dcug'c'dcæpegu'VCUC0'

Cf go ^a u. "guc"co r rkele»p"r tqf wekxc"ug"fkq"gp"grlo cteq"fg"wp"et gekgpvg"eqphke»kxf cf "gpvtg"grni qdkgtpq"{"rcu"vgo kpcrgu"cwqo qvtegu."cwps wg"Vq{qv"ug"crnglcdc"fg"fej c"fkur wco"Rtkpekr cm gpvg."grni qdkgtpq"fg"Etke»kpc"Hgt^a pf gl "fg"Mtkej pgt."cvt cr cf q"gp"wp"ukwcele»p"fg"et gekgpvg"t guwkele»p"gz vgt pc"{"cwo gpvq"fg"rc"lphkele»p."ewr cdc"rc"rcu"vgo kpcrgu"cwqo qvtegu"r qt"i tcp"r ctvg"fg"guqu"r tqdrgo cu"gp"gr"ugevqt"Rgt gl "Cm cpuk"4242d+0"Uk"go dcti q."r qt"ugt"uwr gtcxkctk."Vq{qv"ug"xlq"gp"o c{qt"o gf kf c"gzemkf c"fg"guvg"gpht gpwco kgpvq0Rqt"glgo r nq."gp"4235"ug"ngu"gzki k»c"rcu"cwqo qvtegu"tgf wek"wp"42' "uwu"ko r qtvekpqgu."r gtq"rc"hto c"lcr qpduc"pq"hwg"lpenkf c"gp"fg"fej c"o gf kf c"»Dcrpeg"VCUC."43 19 4236+0"Rqt"qvq"rcf q."ug"cwo gpvctqp"ngu"ko r wguvu"fg"dlgp"gu"fg"nwq"r ctc"ht gpct"rcu"ko r qtvekpqgu"fg"vgj "ewnu"fg"cn"i co c."m"ewcn"i gpgt»"hwgt"v"etwegu"gpvtg"rcu"vgo kpcrgu"{"grni qdkgtpq0"Uk"go dcti q."gp"guvg"cur gevq"VCUC"vco dlk"p"ug"xlq"o c{qto gpvg"gzemkf c"{"c"swg"rc"Vq{qv"J knw"pq"hwg"crcep| cf c"r qt"fg"fej cu"o gf kf cu"r qt"ugt"ecvni cf c"eqo q"wp"vgj "ewnu"fg"vcdclq."cwps wg"rc"UY 6"u"ug"xlq"chgevcf c"r qt"ngu"lpetgo gpvqu"ko r qukkxqu0'

Gu"fgelt."gr"tgeco dlq"i gtgpekn"fg"VCUC"gp"4232"wxq"wp"r cr gr"ko r qtvepv"gp"rc"vtc{ gevtkc"fg"rc"uwduf kctk"gp"gr"rc"u0"Uk"dlgp"{"c"gzku"p"dcugu"guwewwcrngu"uqdtg"rcu"ewcrgu"rc"go r tguc"ug"fg"gur ngi cdc"»gr"tqn"fg"rc"ht"rcn"cti gpvpc"gp"rc"qti cpk cke»p"o wkpcekp cn"rc"r tqf weke»p"fg"r kem"wr u"o gf kpcu"eqp"wp"fg"cpf c"tgi kqpcn"gp"gzr cpuk»p."rc"r r vchqto c"r tqf wekxc"gp"eqo Àp"eqp"rc"UWX"UY 6."rc"eqo r ngo gpwce»p"r tqf wekxc"eqp"Dtculn"rc"r rcpk"kele»p"c"rc"ti q"r rc| q"eqp"uwr gt^a xk"eqo gtekn"{"gr"etgelo kgpvq"fg"VO E"gp"o gtecf qu"go gti gpvqu"ngi q"fg"rc"etkuku"fg"422: /422; +."rc"pwgxc"cf o kpkntceke»p"fg"rc"go r tguc"hwg"ercxg"gp"rc"qdvpeke»p"fg"pwgxcu"lpxgtukppgu"{"uwu"eqpugewgpvqu"cwo gpvqu"gp"rc"r tqf weke»p"{"gzr qtveke»p"fg"vgj "ewnu."i gpgtcpf q"wp"pwgxc"ko r wnu"gp"uw"vtc{ gevtkc"cuegpf gpvq0F"fg"guvg"o qf q."gp"guvqu"co qu"ug"eqphqto ctqp"pwgxcu"ecr cef cf gu"i gtgpekn"ngi"rc"ngi"sw"ug"dcuctqp"gp"wp"pwgxc"rkf gtc| i q"go r tguctkn"gp"rc"hto c"gp"eqplwpvq"eqp"gr"cr q{q"{"eqqr gtceke»p"fg"gr"ukpf kecq."rcu"r qn"kecu"r Àdrkecu"fg"r tqo qeke»p"ugevtkcn"{"rc"t"glpxgtuk»p"fg"rcu"i cpcpeku"gp"rc"r rcpv0' Guvqu"rgo gpvqu."s wg"hqto cp"r ctvg"fg"rc"incrustación nacional"fg"rc"eqo r co "c."r gto kkgtpq"gr"etgelo kgpvq"fg"rc"r tqf weke»p"{"rcu"gzr qtvekpqgu"ngi q"fg"4232."s wg"ug"ka"p"co r rncpf q"gp"ngu"co qu"r quvgtkqtgu0'

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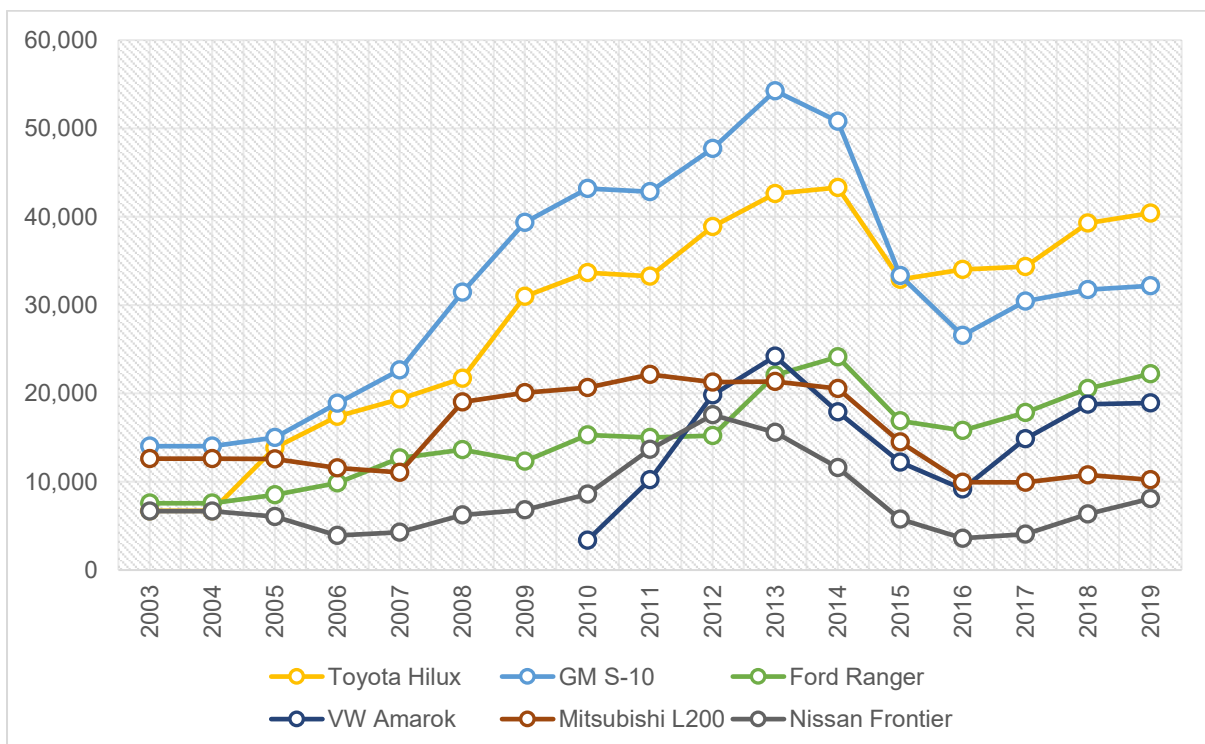
4.6 - El lanzamiento de la nueva Hilux y la superación de los récords previos

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Cf go a u."ug"eqputw{ »"wp"pwgxc"egpvtq"f g"f kvtkdvek»p"f g"tgr wguqu"r ctc"J kwz"{"UY 6."f g" 3: 022"o 4"*Cwqj kwqtk."4242+0C"uw'xgl ."f wtcpvg"4238"ug"rcp| »"rc"J kwz": Ai gpgtcel»p"s wg" ug"qhtgek»gp"34"xgtukppgu"f khtgpvgu0Nc"r tlpekr cn'pqxgf cf "f gptq"f gn'r qt vhrkq"f g"r tqf wevqu" hwg'rc"lpeqtr qtcel»p"f g"wpc"pwgxc"{"gzenwukxc"xgtuk»p"vqr g"f g"i co c."f gpqo kpcf c"UTZ0"

Cf go a u"f g"f lej cu"co r ncekppgu."eqp"rc"pwgxc"xgtuk»p"f g"rc"J kwz"gp"4238"rc"ht o c" crecp| »"f qu"j kqu"ko r qt vcpvgu"gp"gn'o gtecf q"dtcukng° q"{"gp"gn'cti gpvppq0Gp"gn'ecuaq"f gn'r c"ju" xgekppq."guvg"co q"hwg"gn'r tko gtq"gp"gn'ewcnrc"Vq{ qvc"J kwz"uw'gt»"gp"xgpvcu"rc"r ken'wr "o gf kpc" r tqf wekf c"gp"Dtcukn"rc"eco kppgc"Ej gxtqngvU/32."f go quwcpf q"rc"cegr vcek»p"{"2z kq"f gn'pwgxc" o qf gm"»xgt"t a hleq"KK/9+0C"uw'xgl ."gp"4238"rc"J kwz"hwg"gn'o qf gm"o a u'xgpfkf q"gp"Cti gpvpc" r qt"r tko gtc"xgl "gp"uw"j kwqtk."uw'gtcpf q"c"xgj "ewnu"geqp»o lequ"s wg"equwcdcp"tgu"xgegu" o gpqu"s wg"rc"r ken'wr ."eqo q"gn'Xqmny ci gp"t qn'q"gn'HlcV'Rcnkq0Rqt"qvtq"rcf q."gp"4238"ug" tggucdngek»"rc"zr qt vcek»p"c" f gukppqu"rc"wpqco gtlecpqu"gp"rc"equw" f gn'Rce"lleq"s wg"gtcp" cdcungekf qu"j cuw"gu"o qo gpvq"r qt"Vckcpf k0Cu"ll"ug"tgcprf »"rc"zr qt vcek»p"c"RgtA"5654" wplf cf gu+."Ej kg"3085"wplf cf gu+."Gewcf qt"573"wplf cf gu+."c"rc"xgl "s wg"ug"o cpwxkgtqp"rcu" zr qt vcekppgu"c"Eqmqo dlc"40 ; 4"wplf cf gu+0"C"uw'xgl ."cwo gpvctqp"eqpukf gtdngo gpvg"rcu" xgpvcu"gp" f gukppqu" f g"Egptqco 2 tlec."r cucpf q" f g"389" c"30478"wplf cf gu" g"lpeqtr qtcpf q"r c"jugu" eqo q"Gn'Ucrkcf qt."J qpf wcu."P lectci w"{"Repc o a "xgt"t a hleq"KK/: +0"

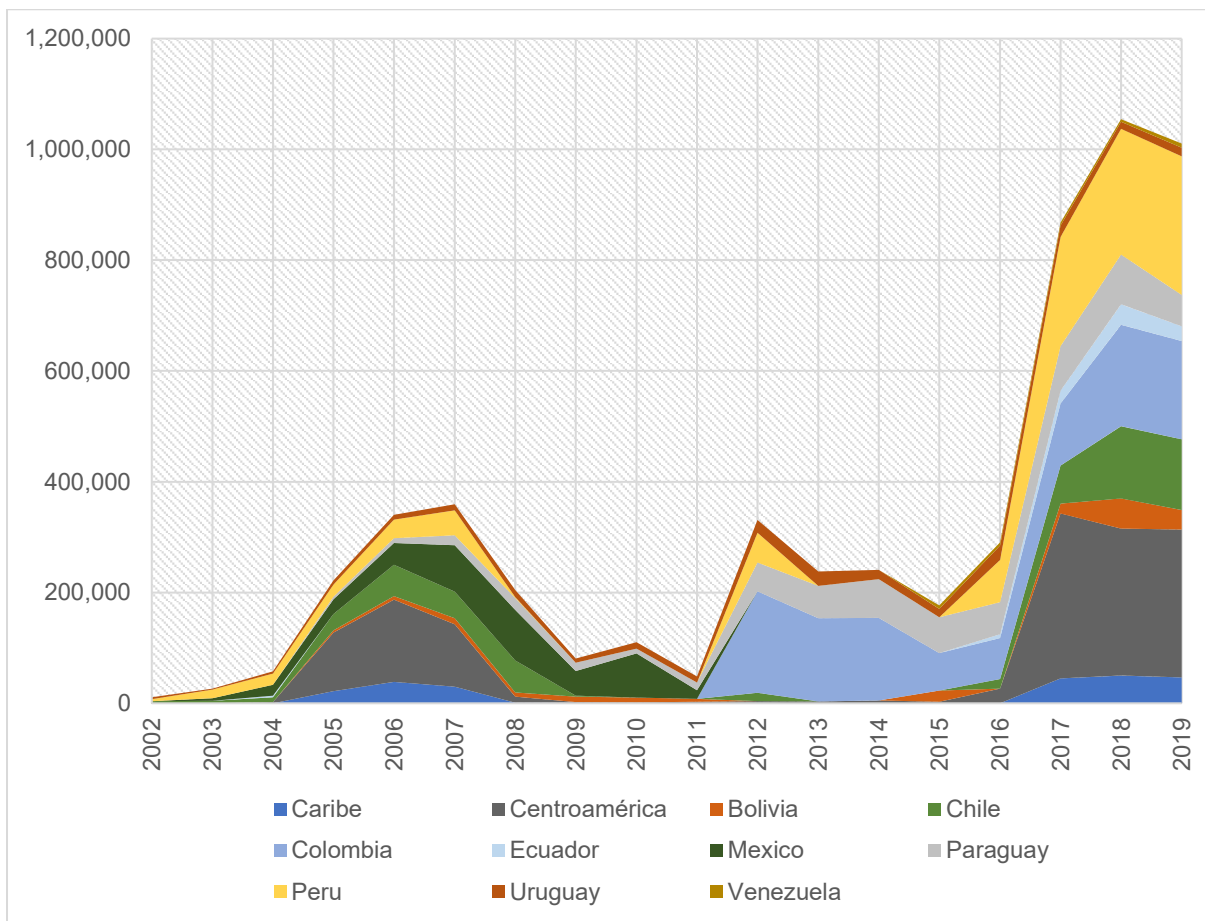
Gráfico IV-7 - Ventas de las principales pick ups medianas en Brasil (unidades) (2003-2019)



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" Eqpvkwpf q"eqp"guv"pwgxq"ko r wuq"uegpf gpv."gp"4239"rc"go r t guc"mji t>>"cwo gpvct" rc"ecr celf cf "f g"r tqf week»p."crecp| cpf q"rc"hdtkceke»p"f g"3460755"xgj "ewmqu"gp"rc"r rpv" f g" \ ^ tcvg."m"ewcn'uwrgt»"co r nco gpv"cn'tguvq"f g"rcu'vgt o kpcrgu"*xgt" I tª hkeq"KK/6+0" Cf goª u."gp" flej q" cº q"rcu"gzr qtvekpogu" c"vqf qu"mqu" f guvkvqu" r qt "hwgtc" f g" Dtcukn'ug" kpetgo gpvctqp" { "ug" uwo ctqp"pwgxqu" r c"pugu" f gn' Ectkdg."vrgu"eqo q" Ctwdc."Cpvkmru" J qmpf gucu."Dej co cu." J ckm" Rvgtvq" Tkeq" { "Tgr Àdrec" F qo kpkcpc" *xgt" I tª hkeq" KK/: +0" Cu" r" rc" eqo r cº "c" eqpuki wk» "gzr qtvt" c"45" r c"pugu" Culo luo q."rcu"gzr qtvekpogu" c" Dtcukn" s wg' tgr t gupvcdcp" gn'9; " gp"4238" r cuctqp" c" gzr rlect" uqmq" gn'76' " f gn'vqcn" gp"4239." f kxgtukhkecpf q" gp" i tcp" o gf kf c" mqu" f guvkvqu" f g" gzr qtveke»p" *xgt" I tª hkeq" KK/6+0'

Gráfico IV-8 - Exportaciones de Toyota Argentina por destinos exceptuando Brasil (miles de dólares FOB) (2002-2019)



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"

" Guvqu"mji tqv'eqo gtekrngu"ko r rlectqp" r tpekr cmo gpv" f gur rc| ct" c" Vq { qvc" Vckrpf kc" eqo q" r tqxggf qtc" f g" xgj "ewmqu" f g" guvqu" f guvkvqu" Rctc" G| gs wkn' Xcmglqu." i gt gpv" f g" Cuwpvqu" I wdgt pco gpvrgu" { "Eqo gtekr" Gzvtkqt" f g" VCUC" f guf g" gn'4225." eqp" cni wpqu" f g" guvqu" r c"pugu" ug"

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nu'f gn'O gtequw. 'Ej krg' { "rc'Eqo wplf cf "Cpf kpc0²²"Uk'go dcti q."eqp"gn'tguv'f g'rcu'pcekqpgu"
ug'eqo r kks'gp'rcu'o kuo cu'eqpf lekqpgu's wg'Vckrcpf kc' *G' gs wkn'Xcmglqu. 'gpv'gxkuc'vgrh'plec."
42 18 14243-0Ugi Àp'gn'glgewkxq."

"

Gnf gucl'f'q's wg'pquqtqu'wxko qu'gpvtg'4235' { "4237'gu's wg'f'dco qu'c'r qpgt'gn'xgj 'f'wq'gp'guqu'f guv'pqu'cn'
o kuo q'r tgekl's wg'Vckrcpf kc'0Gt'c'wp'r tqdrgo c'p'wgt'q'ngi ct'c'gug'equu'0Gn's wg'tgek'f'c'gp'gug'r c'f'u'pq'v'gp'c'
s wg'xgt'p'kpi wpc'f'kgt'gpekc'r qt'j' cdgtug'r tqxkuv'f guf g'Vckrcpf kc'q' 'Cti gpv'pc'0Guq'hwg'gp'o cvgtkc'f'g'equu'
{ "gp'o cvgtkc'f'g'ecrkf cf "co d'k'p'0P q'v'xq { "c'p'gi ct's wg'j' wdq't'gukngpekc'k'plekn'f'g'E'gpvtqco ² tlec'udtg'
v'f q."s wg'v'gp'f'p'wpc'ko ci gp's wg'gn'r tqf wev'cti gpv'p'q'g'c'k'phgt'kqt'cn'cu'k'v'eq'0'Vckrcpf kc'j' cd'f'c'v'p'k'f'q'gn'
o kuo q'f' gucl'f'q'ewcp'f'q'rc'J' k'wz'r cu»'f'g'ugt'1cr q'p'guc'c'ugt'v'ckrcpf guc'0'Guq'ug'r wf q'f'k'kr'ct'0"

"

" Rctc'hji tct'gug'q'dlgkxq. 'pq'uqmq'ug'f'gdk'»'eqpvt'eqp'gn'xkuv'dwgpq'f'g'rc'ecuc'bo cvtk' ."
ukpq's wg'co d'k'p'ug'mgx»'c'ecdq'wp'v'cdclq'f'guf'g'rc'hn'cn'cti gpv'pc'f'g't'grckq'pco k'gpv'q' { "
eqpxgpeko k'gpv'q'eqp'hu'f'k'v'kd'w'k'f'qt'gu'f'g'V'q' { qvc'f'g'ecf'c'wp'q'f'g'guv'q'rc'f'ug'0'Gp'gug'ug'p'k'f'q'."
gn'glgewkxq'f'g'VCUC'v'quv'k'p'g.'"

"

Rctc'g'zr qtvt'p'gegu'k' dco qu'eqpxgpegt'c'nl' tko gt'erkg'p'v's wg'gu'gn'f'k'v'kd'w'k'f'qt. 'f'gur w² u'gu'v'gn'erkg'p'v'k'p'cn'0'
Rctc'gu'q'j' c { "eqpxgpekp'p'c'p'w'rc'gu'gp'Lcr »p' { "ug'ek'cdcp'c'rcu't'gi k'p'p'gu'0'Gu'c'° q'ug'f'gek'f'k's wg'Cti gpv'pc'
r ci ctc'guc'eqpxgpekp' { "ug'j' ceg'gp'Cti gpv'pc'0'Ug'hu'k'p'xk'»'c'rc'rc'rc'p'v'c'0'P w'g'w'c'r'rc'p'v'f'guf'g'gn'4237'gu'v'° "
c'wp'p'k'gn'ki w'cn'q'uw'gt'k'qt's wg'rcu'f'g'Lcr »p'0'Gp'v'p'egu'hu'r tko gt'q'hwg'uat'rg'p'f'gt'hu'eqp'rc'r'rc'p'v'c'0'Nqu'
f'k'v'kd'w'k'f'qt'gu'pq'ug'lo ci k'p'cdcp'g'p'eq'v'ct'ug'eqp'w'pc'r'rc'p'v'f'g'gn'p'k'gn's wg'j' c { "j' q { "gp'Cti gpv'pc'0' ["ecf'c'
i gt'gp'v'g'f'g'wp'° tgc'gp'Cti gpv'pc'ug'g'p'ecti »'f'g'wp'f'k'v'kd'w'k'f'qt. 'f'g'wp'r'c'f'u'0'W'pc'i t'cp'x'gp'v'c'lc'gu's wg'eqp'rc'
o c { qt'f'c'j' cd'no qu'gur'c'° qn'equc's wg'pq'r'cuc'eqp'Vckrcpf kc."gp'v'p'egu'p'qu'r w'uko qu'c'f'k'ur'q'ulek'p'f'g'ecf'c'
wp'q' { "ug'i' g'p'gt'»'wp'i' t'w'q'f'g'cv'g'p'ek'p'c'f'k'v'kd'w'k'f'qt'gu'0' ["hu'q'ht'g'eko qu'c'ri q's wg'pq'v'gp'f'c'Vckrcpf kc's wg'gu'
s wg'ew'c'w'v'k'gt'eq'pu'w'nc.'ew'c'w'v'k'gt'r' tqdrgo c. 'v'gp'go qu'wp'i' t'w'q'f'g'cv'k'p'f'g'gp'gn'bo qo gp'v'q'rc'rc'co cf c. { "gp"
wp'q'q'f'qu'f'f'cu'v'g'r' w'gf'g'r'q'p'gt'w'pc'r'gt'up'c'gp'gn'hw' ct'r'ctc'g'x'c'w'ct'uk'j' c { "r' tqdrgo c'f'g'ecrkf'cf'f'gn'r' tqf' wev'
q'uk'gu'wp'r' tqdrgo c'f'g'wu'q'q'cf'cr'w'ek'p'c'nh'wi' ct'0'Gu'q'f'k'v'kd'w'k'f'qt'gu'eqo r t'cp'c'w'qu'f'g'Lcr »p.'Cuk.'GGWW."
{ "gug'ugt'x'lek'q'hu'wx'lg't'q'p'hu'q'f'g'Cti gpv'pc'0'hw'g'd'c'w'p'v'g'z'k'q'qu'0'Vco d'k'p'hu'c' { wf'co qu'c'r'gf'k'x'gt'uk'q'p'gu'
p'w'g'x'cu's wg'pq'v'gp'f'c'p'0'Gu'q'ug'j' ceg'c'v'cx²u'f'g'Lcr »p.'s wg'c'x'ge'gu'hu'j' k'ek'gt'q'p'r'gt'q'p'q'gu'c'd'k'gp'1'w'w'k'ec'f'q'
{ "f'gn'rc'f'q'f'g'Lcr »p'pq'gp'v'p'f'f'c'p'r'qt's w² r'gf'f'c'p'gug'r' tqf' wev'0' ["pq'ug'hu'f'cdcp'r'qt'wp'r' tqdrgo c'f'g'
eqo w'p'lecek'p'0' ["p'qu'v'q'qu'eqo q'k'p'v'g't'q'ew'q't'gu." { "j' cd'nc'p'f'q'gur'c'° qn'hu'c' { wf'co qu'eqp'gu'q'w'co d'k'p'
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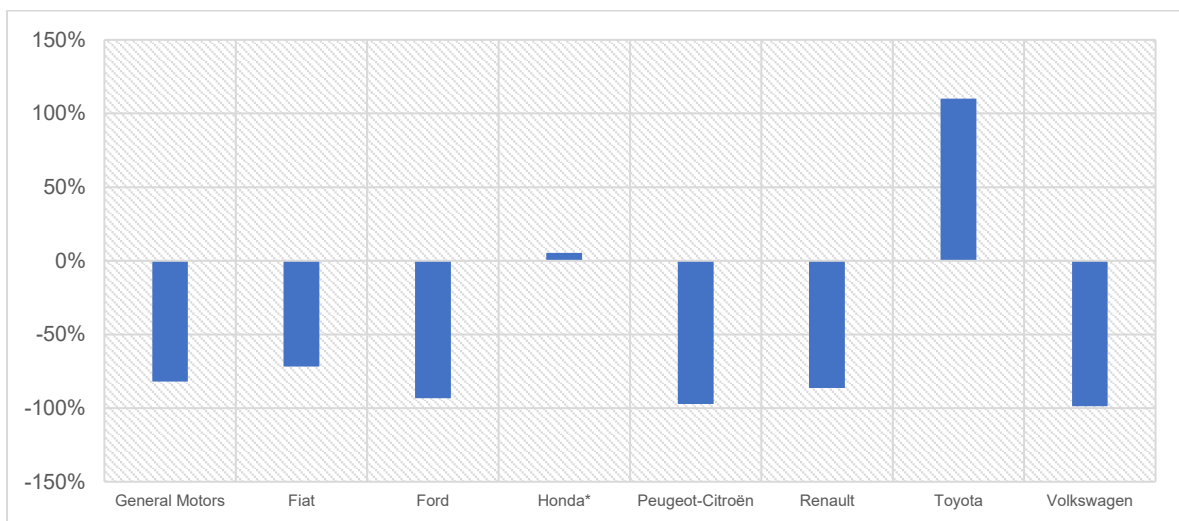
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r' tqf' wev'k'p.'rc't'gf'wev'k'p'f'g'equu'q. { "gn'p'k'gn'f'g'ecrkf'cf'r'ctc'v'q'rc'k'w'ct'rc'k'p'x'gt'uk'p'f'g'rc'"

⁴²²Eqp'Eqmqo dlc'ug't'gcrk' »'wp'p'w'g'x'q'cewgtf'q'gp'423: "°CEG'94-0'

co r ncelep" {" vepkhecelep" f g" r" r nrcpvc." ulpq" s wg" vo dle p" f gdl" dwuct" hqto cu" f g" hpcpeko kpvq"mrecru"{" .hwgi q" f g"j cdgt"crecp| cf q"guqu"qdlgkxqu"{" "eqpxgpegt" c"mqu"glgewkxqu" f g" Lcr »p. "wxq" s wg" go r tgp f gt"wp" tcdclq" f g" cegteco kpvq" c" vqf qu"mqu" f kumkdwk qt gu" f g" Vq { qvc" f g"mqu"pwxqu" f gukpvq" f g" g"zr qt ccelep" c" mqu" s wg" ug" s wgt" f" mgi ct 0Rctc" guvc" f r mjo cec" eqo gtekn" r" egtecp" f" i gqi t^a hlec" {" "gn" k f kjo c" gp" eqo Ap" hwgtqp" ce kxqu" o w f " lo r qt vepgu" r ctc" i cpctng" mqu" o gtecf qu" c" Vckrcpf k0

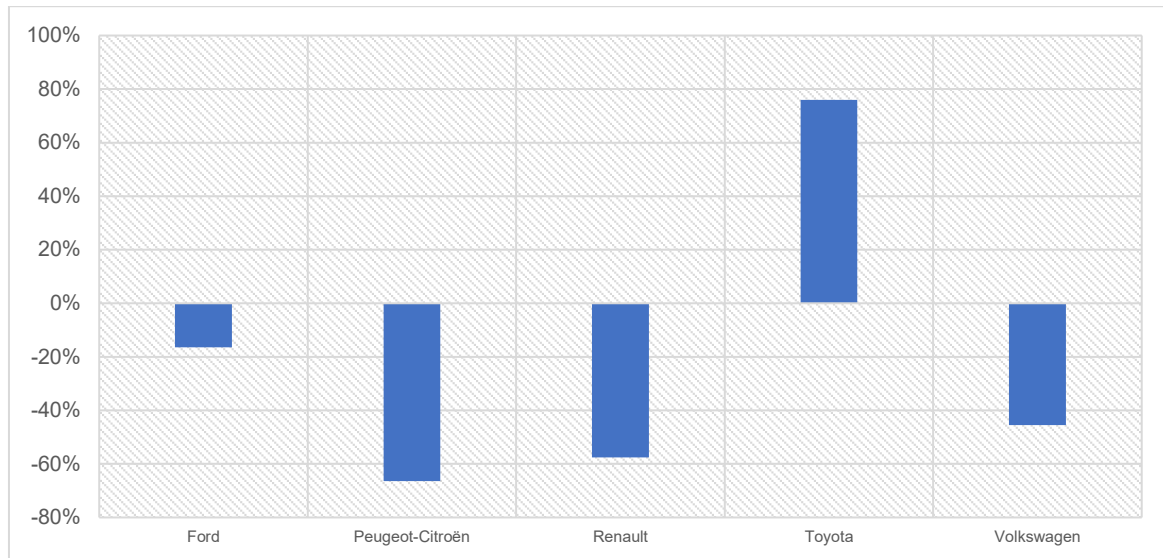
" Gp" mqu" c° qu" uki wkpvgu. " gpt g" 423: {" "423; " Cti gp vkpc" gpt »" gp" wpc" etkuku" geqp » o kcc" {" " hpcpektc" f g" i tcp" o ci pkwf 0Guq" chge »" cnlugevt" cwqo qvqt" mrecn" eqo q" ug" xkq" gp" gn" Ecr "wru" 40Rt kpek rmo gpvg. "mqu" o^a u" r gt lwf kccf qu" hwgtqp" mqu" r tqf wevt gu" f g" cwqo » xkru" o^a u" qt kpvcf qu" cn" o gtecf q" kpvtpq0" Cu" f" vqf cu" rru" vgo kpcrgu. " c" gzegelep" f g" Vq { qvc" {" " J qpf c. " ug" xkgtqp" hwgtvgo gpvg" chgevcf cu" gp" gn" o gtecf q" f g" cwqo » xkru" *xgt" I t^a hlec" KK/; +0" Ukp" go dcti q. " r" r tqf welep" f g" eqo gteknru" r kcpqu" ug" xkq" lo r cecf c" gp" o gpqt" o gf kf c" r qt" r" etkuku. " cwps wg" vo dle p" tguvcn" gnlf gugo r g° q" uwr gkqt" f g" Vq { qvc" gp" guvg" ugi o gpvq" *xgt" I t^a hlec" KK/32+0" "

Gráfico IV-9 - Variación de automóviles producidos en Argentina entre 2011 y 2019 (porcentajes)



Hwgpvg<gndqtcelep" r tqr k" gp" dcug" c" CF GHC0
, Rctc" J qpf c" ug" wkk c" 4234" f g" c° q" dcug" f gdl q" cn" eqo kgp| q" f g" uw" r tqf welep" gp" 4233" {" " gn" dclq" pAo gt q" f g" wplf cf gu" hcdt kccf cu" gp" f lej q" c° q0
"

Gráfico IV-10 - Variación de vehículos comerciales livianos producidos en Argentina entre 2011 y 2019 (porcentajes)



Hwpgv<grdqtcck>p'r tqr kc"gp"dcug'c"CF GHC'

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Vq{ qvc"vppg"wp" hkuqf f'f g'j' cegt'pgi qekqu'f kgt gpv'c"rc"o c{ qt'c'f g'rcu'cwqo qvlegu"gp"rc" Cti gpvpc' Rqt'guc'tc| »p."gpvppf go qu's wg'pq' uqo qu'qu' b^a u'kpf kecf qu'r ctc'tgr t gupvct'iqu'kpvgt gugu'f g'guc'o c{ qt'c' O cpvppf tgo qu' pvgutq' hqeq" gp" pvgutc" gutcvgi ke" f g'rcu' q" r r| q." eqpegvctf c" gp< kpetgo gpvq' f g'rc" r tqf week>p" {"mqecrk' cek>p' f g'rc'vgtu." cwo gpvq' f g'rcu'gzr qtvcclqpgu" {"d'us wgf c' f g'pwxqu" o gtecf qu' Etgcek>p' f g'o^a u' {"o glqtgu" go r rqu" f g'ecrk' cf." qhtgclp q"rc"o glqt"qr ek>p' f g'rc' r tqf wevqu" {"ugt xlekqu" c" pvgutqu'erkpvgu" {"eqpuwo kf qtgu" {"i gpgtcf q"xcmt" geqp>o leq."uqekn' {"co dkpvcn' r ctc'gn'f gucltqmj" uwvpgvcdng'f gn'r c'f o dkq."3: B2 423: +0'

Rqt'qvtq'rcf q."cf go^a u'f g'rcu'qu' tqu'r tqf wevqu" {"eqo gtekrqu' f g'VCUC"gp' guvqu" c^o qu' wco dk' p' uwo ctqp' pwxcu'cevkxf cf gu'f g'f kug^o q."kppxccek>p" {"ugt xlekqu'cuqekcf qu'0Cu'f' c' h'pqu"

f g"423: "Vq{ qvc" I c| qq" Tcekpi . "n" f kxlukp" f gr qt vxc" f g" VCUC. "ncp| » "cn'o gtecf q" gn'r tko gt" xgj ¶ewuq" i mqdcn' f kug° cf q" r qt" kpi gplgtqu" cti gpvkpu" { "r tqf wekf q" gp" \ a tcvg. "n" J kwz" I c| qq" Tcekpi "Ur qt" UGuv" b' qf grq' wxq' b' glqtcu' gp' f gvcngu' guv? veku" { "wpc" qr vko k' cf c' b' cplqdtcdkcf cf " {" eqphqt v" gp" n" uwur gpukp" f gn' xgj ¶ewuq²³ " Cf go a u." kpi gplgtqu" cti gpvkpu" vcdclctqp" gp" eqplwpvq" eqp" egpvtqu" f g" Vckrpf kc. "Lcr » p" { "Cwutcrk" r ctc" gn' f gucttqmq' f g" n" pwxgc" J kwz" I T" Ur qt v' c" ncp| ctug" gp" gn' 4245" *Nc' P cekp. "48 B 14245+0"

Rqt" qvtq" rcf q. "gp" 423: "ug" ncp| » "wpc" r ncvhcto c" f g" o qxkklf cf " f g" Vq{ qvc" gp" Cti gpvkpc" { " Dtcukl' nco cf c" Mkpqv" *Vq{ qvc" O qdkklv" "Ugtxklegu+²⁴ " Cti gpvkpc" ug" eqpxkt vko" gp" gn' hub" f g" eqo wpecekppgu" f g" Mkpqv" f g" vqf c" Ncvkqco ² tkec' F g" guvg" o qf q. "guvc" r ncvhcto c" ug" o cpglc" f guf g" gn' r c¶u. " xgpf k² pf qrg" gn' r cs wvg" llave en mano" f g" Mkpqv" c" vqf c" Ncvkqco ² tkec" *O kulp" Rtqf wevxc. " 3: 19 14244+0" Cf go a u." gp" 423; " n" r ncpw" f g" \ a tcvg" eqpegpvt » "rcu" qr gtcekppgu' tgi kqpcngu' f g" Vq{ qvc" *F kxlukp" r ctc" Ncvkqco ² tkec" { "gn' Ectkdg+ 's wg" j cuvc" gug" o qo gpvq" ug" o cpglcdcp" f guf g" Lcr » p. "eqp" gn' qdlgvxq" f g" hqtvcngegt" uw' r tugupek" gp" Co ² tkec" Egpvtcn' { " f gn' Uwt²⁵ " F g" guvc" o cpgtc. " n" pwxgc" qhlekpc" eqo gp| » " c" eqqt f kpc" r cu" qr gtcekppgu" f g" 59" f kvtldwkf qt gu" kpf gr gpf kgpvqu" s wg" vkgpg" n" eqo r c° ¶c" gp" 58" r c¶igu" f g" n" tgi kpp²⁶"

" F g" guvg" o qf q. "gn' ugi wpf q" ekem" cuegpf gpvq" f g" n" hto c" ug" gZR cpf k" gp" guvqu" Anko qu" c° qu' Gp" r ct vewct. "rcu" kpxgtukppgu" s wg" n" hkn' n' i t » " ecr vct" gp" iqu" c° qu' r t g x k q u" c" 4238" f kgtqp" uuu" h w w q u" gp" iqu" c° qu' r quvgtkqt gu. " c" r guct" f g" n" hwgtvg" eqpvtceekp" f gn' o gtecf q" cwqo qvqt" cti gpvkp⁰ F g" guvg" o qf q. " c" guvc" t g k p x g t u k p" f g" i c p c p e k u" s w g" j c d ¶ c" h q t o c f q" r c t v g" f g" n" u" ecr cekf cf gu' i gtgpekrgu" f g" n" hto c" lwpvq" cn' pwxq" r kf gtc| i q" go r t g u c t k c n" n" eqqr gtcekp" eqp" gn' ukpf kecq" { "rcu" r qn' ¶kecu" r Adrkecu" f g" r tqo qekp. "ug" rg" uwo » " n" f k r m q o c e k" eqo gtekn' s wg" f gur rgi » " n" eqo r c° ¶c" gp" iqu' r c¶igu" f g" n" tgi kpp⁰ C u ¶ i t c e k u" c" guvg" vcdclctq" f g' r tqo qekp" f g' iqu" xgj ¶ewuq" cti gpvkpu" gp" pwxqu" o gtecf qu" { "cn' ² z k q" eqo gtekn' f g' n" pwxgc" J kwz. " n" eqo r c° ¶c" cwo gpv » " hwgtvg" gpvq" uuu" gZR qtcekppgu. 'i cp³ pf qrg' f lej qu' f guvkpu" c" Vq{ qvc" Vckrpf kc' Gp" guvg"

⁴²³"Guv" f kug° q' hvg" wp" r tq{ gevq' ko r wucf q' hwgtvg" gpvq" r qt" gn' r t g u k f g p v g" f g" VCUC. "F cplgn' J gttgtq. " f g" vcn' hqto c" s wg" hvgi q' f g' uw' t g v k t f g' n" r t g u k f g p e k" gp" 4244. "eqpvkw » " eqo q' eqqt f kpcf qt" f g' I c| qq" Tcekpi " { " eqo q' r t g u k f g p v g" f g" Vq{ qvc" Rrpp" f g" Cj qttq⁰

⁴²⁴"Guv" eqo r c° ¶c" f g' o qxkklf cf " f g" Vq{ qvc" cttpe » " r t k o g t q" gp" Cti gpvkpc" { " hvgi q' ug' tgr nle » " gp" Gwtqr c⁰

⁴²⁵"C" uw' xgl. "gp" 423; "Uvgxg" U⁰ Cpi grq' hvg" t g g o r n c| c f q" r qt" O cuj kq" kqwg. "cvps wg" uuu" qhlekpcu" uki vkgtp" gp" Dtcukl' Rqt" qvtq" rcf q. "gp" 423: "Vq{ qvc" Dtcukl' eqo gp| » " c" r tqf wek" gn' o qf grq' [ctku. "wpc" i co c' o g f k c" gpvt g' gn' Gvku" { "gn' Eqtqnc" s wg" { c' ug' r tqf we ¶ p" gp" gn' r c¶u' xgekpp⁰

⁴²⁶"Ugi Ap" F lgi q' Rctf q. " "en este caso puntual, también tiene que ver con una cuestión cultural y de cercanía. La mayoría de los distribuidores en la región operan en países de habla hispana. Además, esta mudanza permitirá que la oficina de LAC se encuentre en una misma zona horaria o cercana a todos los países de América Latina. También es importante considerar que, desde su inicio, Toyota Argentina ha tenido una operación orientada a la exportación, lo que le ha permitido a la compañía establecer relaciones cercanas con nuestros distribuidores en todos los países de la región " " * O qvt3. ". 1: 1423; +0"

tgeqtkf q. 'gn'cevxq'f g'eqo r ctvt 'gnkf kqo c' { 'j wuq'j qtctkq'eqp'gnit guvq'f g'iqu'r c'fuguf g'ic' tgi k»p" hwg'emxg'gp'gnit tgeguq'f g'tgnekqpc kgpvq'eqp'iqu'erkpvguOCf go^a u'f g'guvqu'iqi tqur' tqf wevxqu" { 'eqo gtekrngu. 'ic'f kgeek»p'f g'VCUC'ngx»'c'ecdq'pwgxcu'cevxkf cf gu'f g'f kug^o q. 'kppqxcek»p" { " ugtxkekqu'cuqekf qu'c'ic'r tqf week»p'cwqo qvtk. 'iqu'ewcngu'up'r kppgtqu'gp'gnugevqt'cwqo qvqt" mrecn' { 'ugt^a p'emxgu'gp'gnugevqt'gp'iqu'r t»zko qu'c^o qu0"

Conclusiones parciales

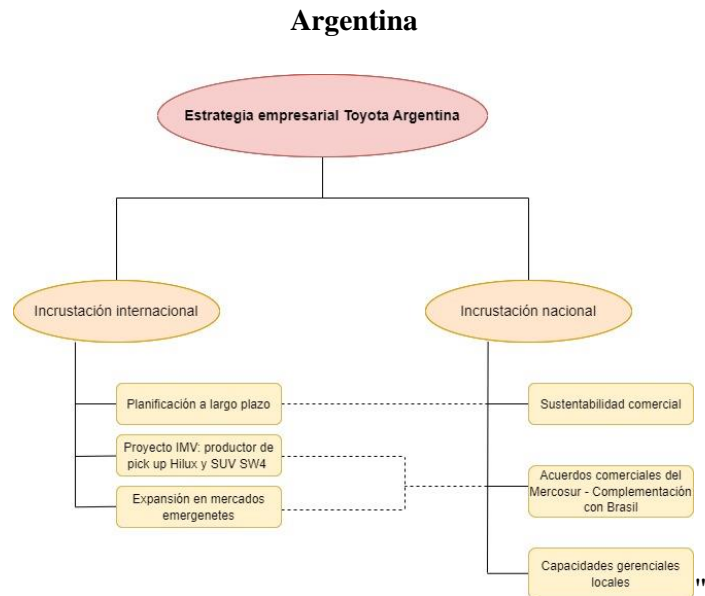
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C'uw'xgl. 'eqo q'hwg'tgxkucf q'gp'gn'ecr 'fwuq'cpvgtkt. 'ic'tcf kecek»p'f g'Vq { qvc'Cti gpvpc" { "gn'r tq { gevq'KO X'ug'f gur ngi ctqp'gp'wpc'ic'ug'gp'ic'ewcn'ic'hto c'o wmpcekqpcn'ug'gpeqvtcdc" gp" r ngpc" gzr cpuk»p" gp" o gtecf qu" go gti gpvqu' vcu" gn' guvpeco kgpvq' f g' mu" r c'fuguf o^a u" f gucttqmf qu." s wg'ngi q'ug'r tqhvpf k»"c'r ctvt'f g'ic'etkuku'f g'422: /422; 0' Cf go^a u." Vq { qvc" guvdc'f gur ngi cvp q'wp'r tgeguq'f g'i mdcnk' cek»p'c'r ctvt'f gn'ewcn'kpvpcdc'dqttct'ic'uf kgtgpekcu" pcekqpcr'guf g'uw'r tgeguq" { "r tqf wevqu0Cu'fw'ic'ic'ngu'uw' co gtecpcu. 'uk'dk'p'p'gtcp'egpvcngu" gp'v² to kpu'r tqf wevxqu" { "eqo gtekrngu'r ctc'ic'o wmpcekqpcn'u'fw'hwgtqp'o gtecf qu'f k^a o lequ" { " gp'etgelo kgpvq'f wcpvg'ic'u'r tko gtcu'f²ecf cu'f gn'uki m0' Cuko kuo q. "gp'guvqu'Ànko qu'f gegpkqu" VO E'ic'ep' ». 'wvq'c'Xqmuy ci gp."gn'rk' gtc' i q'cwqo qvtk' gp'vq'q'gn'o wpf q0"

C'iq'cpvgtkt'ug'lwoc' s wg'gn'r tq { gevq'kpekcn'f g'Vq { qvc'Cti gpvpc'eqo r tgpf k»'f guf g'gn' eqo kgp' q'wp'r ic'p'c'ic'iti q'r ic' q. "r ctvg'ectcevt'fwec'f g'ic'ic' gutcvgi kc" eqtr qtcvkc"i mdcn'f g' Vq { qvc0' Gp" gn' ecuc" cti gpvpc. " guvq' uki pkk»" r tkpek cm gpv" r ic'pvgct" ic' uwvpcdkk' cf" eqo gtekn'f g'ic'r ic'pvc"gp'dcug'c'ic'gzr qtcek»p" { "ic'kpeqtr qtcek»p'f g'eqvqpf q'mecn'gp'iqu"

xgj ¶ewrqu'r tqf wekf qu'gp'gnr c¶u0Gmq'ng'r gto kkb'c'VCUC'eqpvct'eqp'mqu'f »rctgu'pgeguctkqu'r ctc" r'ko r qtvekb'p'f g'r ctvqu'{' r kgl cu.'f cf qu'mqu'j ku»tkequ'r tqdrgo cu'f g'f² hkek'eqo gtekrnf grtugevqt." eqo q'ug'r wf q'xgt'gp'gn'Ecr ¶wru'40'Guqu'cur gevqu'tghnglcp'r ctvg'f gn'r cr gn's wg'rc'uwdukf kctkc" cti gpvpc'ewo r rkb'gp'rc'gurtwewtc'o wmkpcekppcn'{' e»o q'rc'gurtcvgi kc'f g'VO E'ug'r rnuo »"gp'rc" go r t guc'hqecr0'

Figura IV-1 - Diagrama de los principales factores de la estrategia empresarial de Toyota



Hwgpvq'gndqtcck»p'r tqr kc'gp'dcug'cnf g'f gucttqmj'f g'mqu'r tko gtqu'ewctq'ecr ¶wru'f g'rc'vgu0'

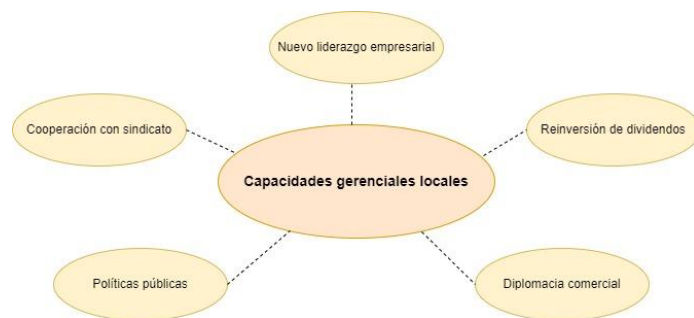
Ukp'go dcti q.'gpvopf kpf q'c'rc'GO "eqo q'wp"espacio social trasnacional eqp'f kwpqu" i twr qu'f kur wcpf q'rcu'lgctcs w¶cu'{' gurtcvgi kcu'gp'uw'kpvgtkqt.'rcu'f k'gevkcu'f g'rc'ecuc'o ctk'pq" r wgf gp"xgtug'f k'gevcu' gpvg'ko r rgo gpvcf cu'gp'rcu'uwdukf kctkc."{' c's wg'mqu'glgewkxqu'mqecrgu" r quggp'wpc'kplgtgpek'tgnxcpvg'gp'rc'ceek»p'f g'rc'hkr0'Cu'¶'r wf q'xgtug'e»o q'rc'r tqf week»p" f g' VCUC" ug' guvpe»" gpvtg" 4228" {" 4232" c" r guct" f g' rcu" r gtur gevkcuc" uqdtg" wpc" o c{qt" r qvpekrnf cf " f g' etgeko kpvq0' Cf go ^a.u." rcu" gzr qtvekpogu" f g' rc' hto c" ug' eqpegvtctqp" hwgtvgo gpvg'gp'Dtcukn" cr tqxgej cpf q'gn'dgpghekq'f gn'kpvgteco dkq'rdtg'f g'ctcpegru." {"ug" r gtf kgtqp'f gukqu" f g' gzr qtvekb'p' f g' mqu'r tko gtqu'c° qu'f gn'4222" s wg'eqo gp|ctqp" c" ugt" cdcugekf qu'r qt'Vckrpf k0'Gp'r ctvwert."guvg'cdqtf clg'f g'rc'hkr0' wmkpcekppcn'eqo q'rc'ctvg'f g' wpc'qti cpk'cek»p'uqekn'eqo r nglc'eqp'eqphrkvqu'gp'uw'kpvgtkqt'r gto kg'gpvopf gt'guc'eqpuvcpvg" eqo r gvpek" s wg' Vq{qvc" Cti gpvpc" go r t gpf g" eqp" Vckrpf kc" gp" v²to kpqu" r tqf wekxqu." eqo gtekrnu'{' vgepqn»i kequ0'

Gn'eco dkq' gp'rc'f k'geek»p' f g'rc'go r t guc'gp"4232"i gpgt»"rcu'eqpf kekppgu'r ctc"rc" eqputweek»p'f g'pwxcu'ecr celf cf gu'i gtgpekrgu's wg'ng'ko r tko kgtqp'wp'pwgqx'ko r wruq'gp'uw'

vc{ gevqtk "cuegpf gpv0Gu" f gek. "rc" ecuc "o cvtk "pq" ng" j cd "c" culi pcf q "pwxcu" lpxgtukppgu" f g" tgrxcpek "c" rc "hkn' mecn" pq" r rpgcdc "wp" cwo gpvq "gp" rc "r tqf weekp" uki phkcvxc "{ "ng" j cd "c" r gto kfk q "c" Vekrpf k "cdcugegt" "c" i tcp" r ctvg "f g" mu" o gtecf qu" r vppco gtlecpqu" c" mu" s wg" Cti gpvpc "ng" j cd "c" gzr qtvcf q "r tglco gpv0F g" guvg "o qf q. "rc" vc{ gevqtk "r quvgtkt" pq" r wgf g" Àpleco gpvg "ugt" gzr rkecf c "eqo q" r ctvg "f g" rc "incrustación internacional" f g" rc "hkn' cti gpvpc. " f glcpf q "xgt" e » o q "grgo gpvqu" f g" rc "incrustación nacional" lwi ctqp "wp" tqn" ko r qtvcpg "gp" rc " eqphqto cekp "f g" rc "gutcvgi k" "{ "rc" qdvpek "p" f g" mu" t guwncf qu" r quvgtkt gu0

Gucu" pwxcu" ecr cekf cf gu" kpenw{ gtqp < " gn" pwxcq" r kf gtc| i q" go r tguetkcn" f g" F cplgn" J gttgtq. "rc" eqqr gtcekp "{ "cr q { q "eqp" gn" UO CVC. "rcu" r qn' hkecu" r Àdkecu" f g" r tqo qekp "ugevgtkcn" rc "tglpxgtuk" p "f g" rcu" i cpcpekcu" "{ "rc" f k r mo cek "eqo gtekn" r ctc "eqps wkuvt "pwxcu" o gtecf qu" f g" gzr qtvcpek p0Cu. "rc" "pwxc" cf o kpkvtcekp "mi t » "t² eqt f u" s wg" uwr gtctqp "tgi kvtqu" j ku» tkequ" f g" rc "kpf wutk" c "wqo qtk "cti gpvpc0Uk'dkpg "ektvcu" eqpf lekppgu" r ctc "gn" b c { qt "et geko kgpvq" guxcdp" f cf cu. "wo dk p" gz kxk » "wp" erctq "eqpvcug" gpvtg" gn" guvpeco kpvq" r tqf wekxq. "eqo gtekn" g" lpxgtuqt "f g" VCUC "gpvtg" 4228 "{ "4232" "{ "gn" pwxcq" ko r wuq "f cf q "gp" mu" c° qu" uki wgpvqu. "f cpf q" ewgpc "f g" rc "ko r qtvcpek" f g" rc "incrustación nacional" f g" rc "gutcvgi k" f g" rc "hko c0"

Figura IV-2 - Elementos de las capacidades gerenciales de TASA a partir del 2010



Hwgpvq < "gn" dqtcekp "r tqr k" "gp" dcug "c" if g" f gucttqmj "f g" mu" r tko gtqu" ewctq "ecr "wqu" f g" rc "vguk0"

Gp" r ctvewrt. "gn" eqo r tqo kuq "{ "eqqr gtcekp "eqp" gn" UO CVC "ug" hqt l » "eqp" rc "eqpf weekp" f g" Tlectf q "Rki pcpgrk" "wgi q" f g" hwgtvqu" gph gpvco kpvqu" uqp "gn" ukpf kecq "gpvtg" 4225 "{ "42290" Guvqu" cewgtf qu" kpenw{ gtqp "rc" ko r qulek "p" f gn" VRU "gpvtg" mu" tcdclcf qtgu. "rc" o qf hkecekp "f g" mu" eqpxgpkqu" eqrgevxcqu" f g" tcdclq "{ "rc" r ctvckr cekp "f gn" ukpf kecq "gp" rcu" pgi qekcekppgu" eqp "rc" ecuc" o cvtk "r ctc" rc "qdvpek" p "f g" rcu" lpxgtukppgu" f g" 4235/42370

C "uw" xgl . "gp" guvg "Ànko q" tgeqtkf q "ug" f guvcectqp "rcu" f kpkvcu" hwgpvqu" f g" hpcpekco kpvq" r ctc "rc" b c { qt "lpxgtuk" p "cwqo qtk "f g" rc "j kuvtk. "gpvtg" rcu" ewcrgu" guxcdp "rcu" b kuo cu" i cpcpekcu"

f g"re"go r t g u c . " d c p e q u " m e c r i g u " g " l p v g t p c e k q p c r i g u " { " e t ² f k q u " g u v c r i g u " c " v c u c u " u w d u k f k c f c u O " G u r q u " A n k o q u " u g " u w o c p " c " w p c " u g t k g " f g " r q r " m e c u " r A d r e c u " { " f k u r q u k e k q p g u " l p u k w e k q p c r i g u " s w g " V q { q v c " C t i g p v k p c " w k r k } » " g p " g u v c u " f ² e c f c u . " g p v t g " r e u " s w g " u g " f g u v c e p " g n i c e w g t f q " e q o g t e k r i e q p " D t c u k i " { " q v t q u " r c " u g u " f g " r e " t g i k o p . " r e " k o r q t v c e k o p " f g " o c s w k p c t k c " g z g p v c " f g " c t c p e g r u . " q v t q u " h k p c p e k o k g p v q u " r A d r e q u . " g n i t ² i k o g p " f g " C f w p c " g p " H e v q t " c . " g z g p e k q p g u " k o r q u k k x c u . " t g l p v g i t q u " r q t " e q o r t c u " f g " c w q r c t v g u " p c e k q p c r i g u " { " r e " h k p c p e k e k o p " c " v c u c u " u w d u k f k c f c u " r c t c " r e " x g p v c " f g " u w u " x g j " p e w r q u " e q p " g n i r t q i t c o c " R t q E t g C w q 0 "

Gurqu"j emx| i qu"uqdtg"gn'cr q{q"guv'cn'c"re"ht o c"lcr qpguc"uqp"tgrgxcpvgu"r etc"guv" lpxguvki cek»p" { c's w'g'o c'vk cp'cri w'pqu'f g'hu'gpwpekcf qu'f g're"j kr »v'guku'kplekcn'f g'guv'v'guku."gp" re'ewcn'ug'uquv'p'c's w'gn'f gucttqmq" f g"VCUC"ug'f kq'f g'hqto c"lpf gr gpf k'p'v'f g'rcu'r qn'm'ecu" r A d r e c u O " F g " g u v g " o q f q . " u k ' d k g p " g n i G u v c f q " c t i g p v k p q " p q " f k k i k o " g u v g " r t q e g u q " f g " f g u c t t q m q " { " g u r g e k r k k c e k o p " g p " r e " r t q f w e e k o p " f g " r k e n i w r u " / p k ' e q p " V q { q v c " p k ' e q p " g n i t g u v q " f g " r e u " c w q o q v t l e g u " c t i g p v k p c u " u " d t k p f » " p w o g t q u q u " b g e c p k u o q u " f g " c r q { q ' s w g " r g t o k k g t q p " g n i f g u r r k g i w g " f g u e t k r v q O " G u v q " e q p v t c u v " e q p " g n i e c u q " v c k r p f ² u " f p p f g " g n i G u v c f q " f g " g u g " r c " u " r e p | » " w p c " r q n i m e c " f g " o r t q f w e v q " e c o r g » p " p c e k q p c r i o " e q p " w p c " u g t k g " f g " l p e g p v k x q u " h k u e c r i g u " { " e q o g t e k r i g u " r c t c " s w g " r e u " g o r t g u c u " c w q o q v t l e g u " u g " g u r g e k r i e g p " g p " r e " h c d t k e c e k o p " f g " r k e n i w r u . " e q o q " u g " x k q " g p " g n i e c r " p w r q " c p v g t k q t O " R q t " g n i e q p v t c t k q . " g p " C t i g p v k p c . " g u v g " r t q e g u q " g u w x q " b c { q t o g p v g " e q p f w e k f q " r q t " g n i b g t e c f q . " e q p " g n i r t q v c i q p k u o q " r k a p g t q " f g " V q { q v c " C t i g p v k p c . " { " g n i G u v c f q " c e q o r c o » " g n i e t g e k o k g p v q " f g " g u v c " g o r t g u c " { " f g n i u g e v q t " g p " u w " e q p l w p v q " e q p " r e u " f k u k p v c u " b g f k f c u " b g p e k q p c f c u O " "

Rqt" Anko q." ug" f guv'ec" gn' hwgtv'g" v'cdclq" f g" f k r nqo cek" eqo gtekn' gp" nqu" r c'p'gu" re'v'p'qco gtecpqu'hwgi q'f g're"qdv'pek»p'f g're"lpxgtuk»p."s w'g'eqp»"eqp"gn'ce'v'xq"cf lek'apcn'f gn' kf kqo c" { "j wuq"j qtctkq"eqo r ctvkf q."nq"s w'g"ng"r gto k k o " c " r e " h k r k n i " c p c t r g " f l e j q u " o g t e c f q u " c " V q { q v c " V c k r p f k c " { " e q p e t g v c t " m u " c w o g p v q u " g p " h q u " p k x g r u " r t q f w e v k x q u " { " e q o g t e k r i g u " f g " r e " h k t o c " n q e c r i O "

Gp" v²to k'pqu"o a u"i g'p'gt'c'rgu" { " v g » t l e q u . " m " f g u c t t q m c f q " j c u v c " g u v g " e c r " p w r q " r g t o k g " t g h g z k a p c t " c e g t e c " f g " r e " c e e k o p " g e q p » o l e c " f g " u w d u k f k c t k c u " f g " G O " g p " r c " u g u " r g t k f t l e q u O " R q t " w p " r e f q . " r e " g x k f g p e k " t g r g x c f c " r g t o k g " x g t " r e u " f k h g t g p e k u " s w g " g z k u v g p " g p v t g " r e u " f k u k p v c u " h k t o c u . " k p e n w u q " g p " w p " b k u o q " u g e v q t " g e q p » o l e q O " F g " g u v g " b q f q . " h q " x k u v q " g p " g u v g " c r c t w f q " t g c h k t o c " r e " k f g c " f g " s w g " p q " r w g f g " r g p u c t u g " c " g u v c u " e q o r c o " p c u " e q o q " c i g p v g u " j q o q i ² p g q u . " w p k c t k q u . " o c z k o k k c f q t g u . " e q p " k p h q t o c e k o p " e q o r n g v c " { " t c e k q p c r i k c f " r g t h g e v c . " u k p q " s w g " g u v q u " c e v q t g u " u q p " g p " t g e r k f c f " q t i c p k k c e k q p g u " e q o r n g l c u " s w g . " u k ' d k g p " r w g f g p " v g p g t " q d l g v k x q u " f g " o c z k o k k c e k o p " g e q p » o l e c . " ² u v q u " p q " u g " f c p " f g " k f ² p v l e c " h q t o c . " { " s w g . " u k ' d k g p " r w g f g p " v g p g t " e k g t v c " t c e k q p c r i k c f " g p " r e " d A u s w g f c " f g " f l e j q u " h k p g u . " r e " o k u o c " g u v ³ " f g r i k o k c f c " r q t " u w " e q p v g z v q O " G p " r c t v e w r c t . " r e " g u v t c v g i k c " f g " r e u " u w d u k f k c t k c u " f g " G O " u g " r w g f g " g p v g p f g t " c " r c t v k " f g " u w " *doble incrustación* ,

tghz kpcpf q'udtg'e»o q'gucuhkto cu'ug'kpuvtcp'gp'rcu'tgf gu'kvtgpcelkpcrgu'{'pcelkpcrgu's wg"
rc"o qif gcp0'
"

CAPÍTULO 5

Gobernanza y upgrading en la cadena de valor de Toyota Argentina

Introducción del capítulo

Gp"mqu"ecr ¶wawu"r tgegf gpvgu"ug"j c" f gucttqmcf q"ew³ n"hwg"gn'tgeqtkf q" f g" Vq{ qvc"gp" Cti gpvpc"gp"rcu"Ànko cu" f² ecf cu" { "mqu" hcevtgu" s wg" m" ko r wuctqp0'Cu¶"ug"j c"o ctecf q"rc" gzege ekqpcrkf cf "f g" guc" hto c" gp" wpc" ugtkg" f g" f ko gpukppgu" { "ug"j c" gzi rkecf q" uw" *estrategia empresarial* c" r ctvk" f g" uw" *incrustación internacional* { "nacional. Eqo q" r ctvg" f g" guc" r ctvkwctkf cf . "gp" gn'Ecr ¶wawu"4"ug"j c" xkux" s wg" guc" hto c" j c" kf q" kpeqr qtcpf q" b c { qt' eqpvpkf q" mceñc'uwu" xgj ¶wawu" s wg" gn'r tqo gf kq" f gn'ugevt0Cf go³ a. "ug"j c" eqttqdtcf q" s wg" guc" eqo r cº ¶c" hwg"rc" Àplec" uw" gtcxkctk" f g" rc" tco c" vto kpcñf wcpvg" gn'r gt¶qf q" dclq" guwf kq" { "ug"j c" o quctcf q" e»o q" mgi »" c" guqu" tguwncf qu" gp" gn'Ecr ¶wawu"60' C" uw" xgl . " guv" f gucttqm" f g" r tqxggf qtgu" mceñk cf qu" gp" gn'r c¶u" ug" tgncekp" eqp" mqu"rc| qu" f g" o c { qt' eqqr gtcekp" gpvtg" Vq{ qvc" { "uwu" r tqxggf qtgu" gp" vqf q" gn'o wpf q. "vñleqo q" ug" xkq" gp" gn'Ecr ¶wawu"50

Cj qtc" dkgp. "c" r ctvk" f g" m" gzi wguv" j cuv" guc" ugeekp. "s wgf cp" r qt" tgur qpf gt" cri wpcu" r tgi wpcu" r ctc" r qf gt" cpcrk ct" gzi cwukxco gpvg" s w² "hcto c" vqo »"rc" tgncekp" f g" VCUC" eqp"rcu" go r tgucu" wdkecf cu" òci wcu" cttkdcò" gp" uw'ecf gpc" f g" xcmqt0'Cu¶" ecdg" kpvgtqi ctug" uqdtg" äew³ ngu" uqp"rcu" cwqr ctvgu" r tqf wekf cu" gp" gn'r c¶u" { "ew³ ngu"rcu" ko r qtvcf cu" A"äE»o q" j c" xctkcf q" guv" c" m" rcti q" f g" mqu" cº qu" A" äS w² "vr q" f g" go r tgucu" r tqf wegp" gucu" r ctvgu" { "r kgl cu" gp" Cti gpvpc" A" äNc" hcto c" f g" *gobernanza* "gu" j qo qi² pgc" eqp" vqf cu" uwu" r tqxggf qtgu" A" äNc" hto cu" mceñgu" j cp" ukf q" ecr cegu" f g" o glqtct" uwu" ecr cef cf gu" c" vcx² u" f g" r tqeguqu" f g" *upgrading* A" äNc" tgncekp" eqp" Vq{ qvc" rgu" j c" r gto kxf q" mgi ct" c" vqcu" vto kpcñgu" gp" gn'r c¶u" q" gzi qtvt" uwu" r tqf wevqu" A"

F g" guc" hcto c. "gn'qdlgkxq" f gn'r tguvpg" cr ctvcf q" gu" tgur qpf gt" f lej cu" r tgi wpcu" c" r ctvk" f gn'cp³ ruku" f g" rc" xkpwcekp" f g" guc" vto kpcñcwqo qvkk" { "uwu" r tqxggf qtgu" 0'Gp" r tko gt" hwi ct. " ug" gzi rkect³ "ew³ ngu" uqp"rcu" r tkpkr cñgu" r ctvgu" { "r kgl cu" ko r qtvcf cu" { "r tqf wekf cu" gp" gn'r c¶u" { " e»o q" guv" j c" xctkcf q" gp" mqu" f qu" r tko gtqu" f gegpkqu" f gn'uki m" *5.1+0' Nwgi q. "ug" f guetkdk³ "gn' ukwgo c" f g" f gucttqm" f g" r tqxggf qtgu" f g" VCUC. "gzco kpcpf q"rcu" f kwpvcu" gcr cu" f g" guv" r tqegf ko kgpvq" { "uwu" r tqi tco cu" f g" cr q { q" *5.2+0'

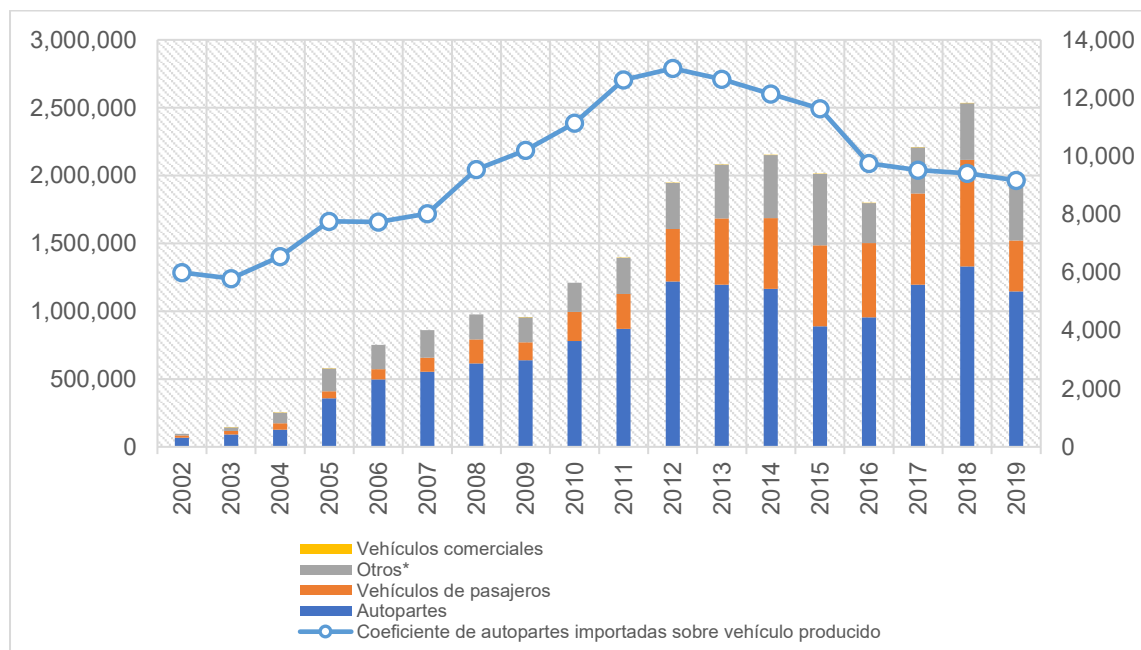
C" eqpvkpwcekp. "ug"j ct³ "wp" cp³ ruku" ci tgi cf q" uqdtg" mqu" r tqxggf qtgu" f g" cwqr ctvgu" f g" Vq{ qvc" tcf kecf qu" gp" Cti gpvpc. "ercukh³ pf qmqu" gp" vtu" i tcpf gu" i twr qu" c+ "O wkpcekp cñgu" lcr qpgucu. "d+ "O wkpcekp cñgu" p" lcr qpgucu" { "e+ "Nqecñgu" *5.3+0' Nwgi q. "ug" tgnck ct³ "wp" gzco gp" kpf kxf wñ" f g" mqu" r tkpkr cñgu" qpeg" r tqxggf qtgu" f g" Vq{ qvc" tcf kecf qu" gp" Cti gpvpc0' Guvcu"

go r t g u c u " u q p < " F g p u q . " V q { q v c " D q u j q m w " [c l c n k " F c p c . " O g v c n c . " K p f w a t k u " I w k f k " G u v g d c p " E q t f g t q . " X g p v c n w o . " R q r k o g v c n " E T C O H U C " { " O k i q t " * 5 . 4 + 0 " R q t " A n k o q . " u g " j c t a " w p " c p a r k u k u " i g p g t c n l u q d t g " r c " g o b e r n a n z a " f g " V C U C " { " m u " r t q e g u q u " f g " u p g r a d i n g " f g " u w u " r t q x g g f q t g u " g p " d c u g " c " m q " g z r w g u v q " g p " g n l e c r " * 5 . 5 + 0 " " "

5.1 - Contenido local e importado de los vehículos de Toyota Argentina

Eqo q " u g " j c " f g u c t t q m f q " g p " g n l e c r " * 4 . " g p v t g " r c u " v g t o l p c r g u " t c f l e c f c u " g p " g n l e c r " c " u . " V q { q v c " g u " r c " A p l e c " s w g " c r e c p l > > " u w r g t a x k " e q o g t e k n l f w t c p v g " g n l e c r " g t " q f q " d e l q " g u w f k q " { " r c " s w g " o a u " e q p v g p k f q " m e c n l j c " l p e q t r q t c f q " c " u w u " x g j " f e w r q u " * x g t " I t a h e q u " K K 3 2 " { " K K 3 3 + 0 " C " r c t w k " f g " g u q u " j c m c l i q u . " g u " k o r q t v c p v g " r c t c " g u c " v g u k u " c p c n k c t " e q p " o c { q t " f g v c m g < 3 + e > > o q " u g " e q p h q t o > > " r c " g u t w e w t c " f g " u w u " k o r q t v c e k q p g u " c " m q " n c t i q " f g " g u v q u " c o q u . " { " 4 + " f g " s w " h q t o c " g u v c u " k o r q t v c e k q p g u " h w g t q p " w k k c f c u " r q t " r c " g o r t g u c 0 " G p " g u g " u g p w f q . " g n l e c r " I t a h e q u " X / 3 " r t q r q t e k q p c " c n i w p c u " t g u r w g u c u 0 " "

Gráfico V-1 - Principales grupos de productos importados (miles de dólares) (eje izquierdo) y coeficiente de autopartes importadas por vehículo producido de Toyota Argentina (dólares) (eje derecho) (2002-2019)



H w g p v g < " g n d q t c e k > p " r t q r k c " g p " d c u g " c " C F G H C . " U q h m c f g . " C f w e p c " { " d c r e p e g u " f g " V C U C 0 " , Q t q u " g z e n w f g " x g j " f e w r q u " { " c w q r c t v g u " g l p e n w f g " d l g p g u " x c t k q u . " v c r g u " e q o q " e q o d w a k d r g u 0 " " "

" Cu¶ "gp'r tko gt'nwi ct."ug'r wgf g'xgt's wg'gn'r tkepr cni' twr q'f g'r tqf wevqu'ko r qtvcf qu'gp" vqf qu" nqu" c° qu" hwgtqp" cwqr ctvqu. " f cpf q" ewgpvc" s wg" ug" r tkxkxi k»" r" ko r qtvcckp" r ctc" r" r tqf weekp'cpvqu's wg'rc'f g'xgi ¶ewqu'f g'r cuclgtqu's wg'pq'gtcp'hdtkcf qu'gp'gn'r c¶u'r ctc'xgpf gt" gp'gn'o gtecf q'kwgtpq⁴²⁷"

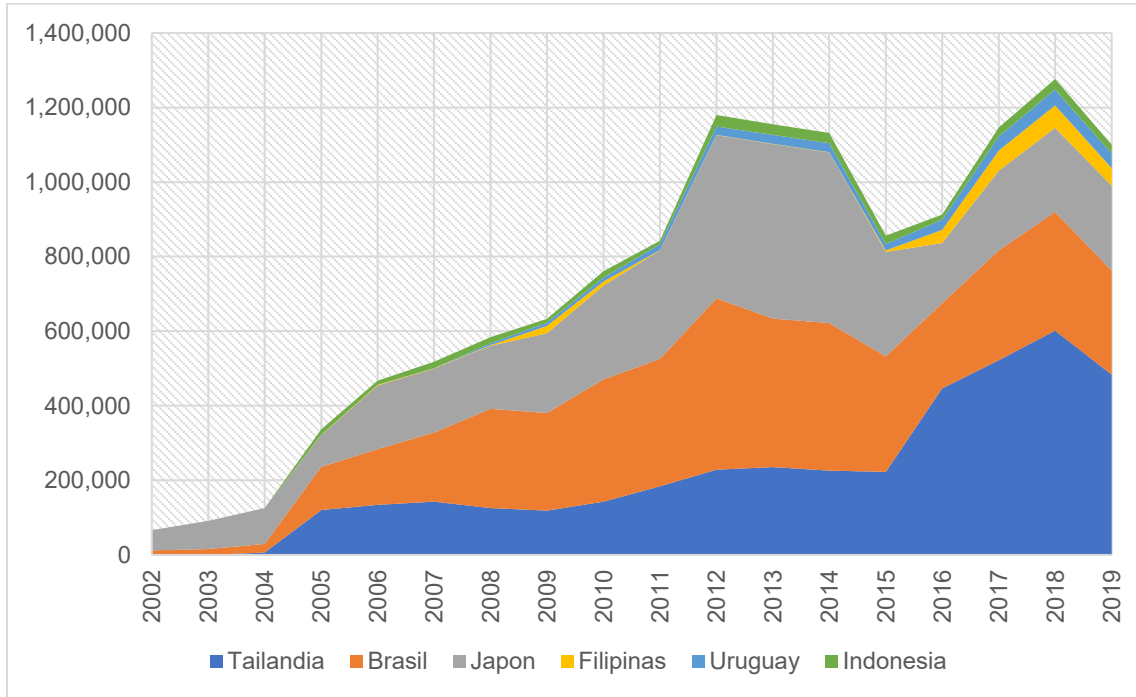
Rqt" qvtq" rcf q."ug'r wgf g' qdugt xct" s wg'gn' eqghekpgv" f g' cwqr ctvqu" ko r qtvcf cu' uqdtg" xgj ¶ewqu'r tqf wekf qu'cwo gpvc'j curc'4234." { "hwgi q'f guelgpf g' uquvplk co gpvc. f° pf qug'wpc'dclc" o° u'r tqpwpekcf c" gpvtg'4237" { "42380Guvq'kpgg'uw'eqtgtrv" eqp'rcu'f kwpvcu'gscr cu'f g'rc' hto c" xkrcu'gp'gn'Ecr ¶wru'60Gu'f gek. "s wg'gn'cwo gpvq'f g'rc' r tqf weekp" { "rcu'gzt qvcekpgu'c' r ctvt" f g<3+"gn'eco dlq" i gtgpekn'f g'4232." { "4+"f gn'rcp| co kgpvq'f g'rc" J kwz": AI gpgtcekp" eqp'rcu' pwgxcu" kpxgtukpgu" tgcrlk cf cu" gp" r r rcpvc" *4235/4237+ " guwxlgtqp" ceqo r c° cf cu" r qt" wpc" o c { qt" kpeqr qtcekp" f g" eqpvglk q" mecn' gp" nqu" xgj ¶ewqu' Ukp" go dcti q." o° u' cni" f g" guvg" kpf kecf qt. 's wg'f gpvc'wp' r tqeguq'f g'uwukwep'f g'ko r qtvcckpgu. 't guvc' ucdgt' ew° ngu'hwgtqp'rcu' cwqr ctvqu' mecnk cf cu" { "s w° go r tgucu'ug" gpecti ctqp'f g'f lej c' r tqf weekp0'

Rqt" qvtq" rcf q." cpcrk cpf q" eqp" o c { qt" f gvplk kgpvq" gn' f gvcmg" f g" guvcu' cwqr ctvqu" ko r qtvcf cu'ug'r wgf gp'xgt' qvtqu'tcui qu'ucnkpgvu0'Gp'uwu'kpekqu. "rcu'ko r qtvcckpgu'f g" VCUC" r tqxgp¶cp'o c { qtkctkco gpvg'f guf g'gn'r c¶u'f g'qtki gp. 'Lcr »p. 'ukp'go dcti q.'c' r ctvt' f gn'4227. 'eqp' r" glgewekp" f gn' r tq { gevq" KO X." eqo gp| ctqp" c" etgegt" qvtqu" qt¶i gpgu. "wrgu' eqo q" Dtcuki" { " Vckrcpf kc. 'qu'ewrcgu'ug' eqpxkgtv" gp'qu'o c { qtkctkqu'c' r ctvt' f g'4237" *xgt' I t° hkeq'X/4+0Guv" Ànko q'qtki gp'ug' eqpf keg' eqp'gn'wi ct' s wg'hwg'vqo cpf q' Vckrcpf kc" eqo q' hub" f g' r tqf weekp" f g" r" J kwz' gp'rc' gutwewtc' f g' VO E. 'vnrëqo q'ug'f gucttqm» gp'gn'Ecr ¶wru'50Uw'o c { qt' etgeko kgpvq" eqo q' r tqxggf qt' f g' cwqr ctvqu' r ctc" Cti gpvpc'ug' f c" hwgi q' f g'4237. 'eqp'gn'rcp| co kgpvq'f g'rc" J kwz": AI gpgtcekp0'

"

⁴²⁷"Guvqu'f cvqu'tghwt| cp'rc'kf gc'f g'e»o q'rc'go r tguc'cncp| »gn'rkf gtc| i q'gp'r tqf weekp" { "dncp| c'eqo gtekn'gp" Cti gpvpc0'Rqt" glgo r nq." eqo r ctcpf q' eqp" r" vc { gevqk' f g' Xqmuy ci gp" Cti gpvpc. "uk' dlgp" r" hto c" cigo cpc" cncp| »" plxgrgu' f g" r tqf weekp" { "gzt qvcekpgu" uw' gkqtgu" c" Vq { qvc" gp" cni' vqu" c° qu' f gn' r gt¶jf q." r" cnc" ko r qtvcckp' f g'xgi ¶ewqu'f g'r cuclgtqu'cni' c¶u'rc'j k q'wpc' hto c' hwgtvgo gpvg'f ghekctk. "qvcrk cpf q'gp" ów&u90827" o kmppgu'uw'dncp| c'eqo gtekn' r ctc'gn'r gt¶jf q'4224/423; 0'

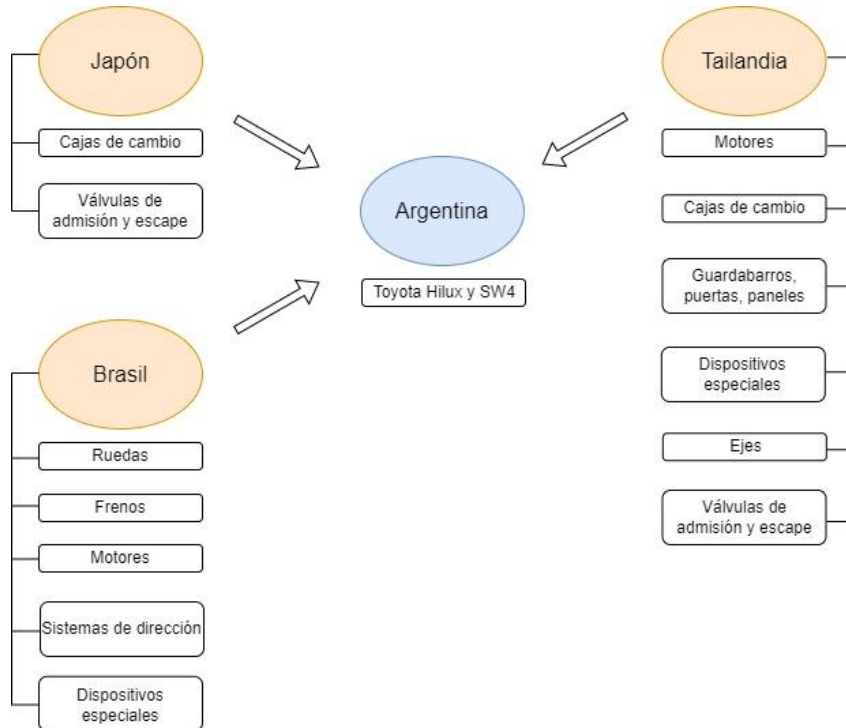
Gráfico V-2 - Importaciones de autopartes de Toyota Argentina por principales orígenes (miles de dólares) (2002-2019)



Hæpgv<gndqtck»p'r tqr kc'gp'dcug'c'Uqhtcf g.'Cf wpc'f'{''dcæpegu'f'g'VCUC0'

"

Figura V-1 - Principales grupos de autopartes importadas por orígenes (acumulados entre 2002 y 2019)



Hæpgv<gndqtck»p'r tqr kc'gp'dcug'c'Uqhtcf g.'Cf wpc'f'{''dcæpegu'f'g'VCUC0'

Gzco kpcpf q'nc'gutwewtc'f'g'ko r qtwckpogu'f'g'cwqr ctvqu'eqp'o c { qt'f'gvcmg'ug'r wgf g' tgeppqegt's w' r tqf wvqu'ug'eqo r tctqp'f'g'guvqu'r c'f'uguo'Gp' guvg'ugpvkf q.'ug'pqvc's wg'ekgtvqu' ukvgo cu' { 'r ctvqu'etwckrgu's wg'pq'uqp'r tqf wvlf qu'mqecm gpvg'hwtqp'tc'f' qu'f'g'guvqu'qt'f' gpguo' Gp'r tko gt'hw' ct.'ecdg'o gpekqpc't's wg'iqu'o qvqtgu'c'p'chc'uqp'r tkpek'cm gpvg'ko r qtwcf qu'f'guf g' Vckrpf kc.' { 'hw'gi q'f'g'Dtcukl'Gp'nc'r'nc'p'f'g' \ ^ tcv'ug'r tqf wvgo' qvqtgu'f'k' ugn'r gtq'2'uvqu'up' gugpekcm gpvg'gpuc'o drcf qu'c'r ctvkt'f'g'nc'ko r qtwckp'f'g'r ctvqu' { 'r kgl cu'*O kulop'Rtqf wvkc.' 3: 194244-0²⁸'Cf go ^ u.'gp'nc'f' dtlec'mqecm'vco dk'p'ug'gpuc'o drcp'iqu'ukvgo cu'f'g'uwur gpukop.' r gtq'guv'ug'j' ceg'c'r ctvkt'f'g'eqo r tcu'f'g'cwqr ctvqu'p'ckqpcrgu'*Nwku'N>r gl . 'gpvtgxkvc'r gtuqpcn' 38B44244-0"

Rqt'qvtq'nc'f'q.'ug'gpewgpvtcp'ncu'eclcu'f'g'eco dlq.'s wg'uqp'o c { qtkctkco gpvg'ko r qtwcf cu' f'guf g'Vckrpf kc'0Nwgi q.'ug'r wgf g'o gpekqpc't'gn'ukvgo c'f'g'htgpqu' { 'f'g'f'k'geekop's wg'r tqxkpg' f'g'Dtcukl'0Rqt'Awko q.'c'wps wg'gp'o gpqt'o gf'kf'c.'f'guf g'Lcr »p'hw'gi cp'x^'nc'wru'f'g'cf'o kulop' { ' guerc'g' *Nwku' N>r gl . 'gpvtgxkvc'r gtuqpcn' 38B44244-0' Nc' ko r qtwckp'f'g' guvqu' ukvgo cu' *r tkpek'cm gpvg'iqu'o qvqtgu' { 'ncu'eclcu'f'g'eco dlq'+ug'f'guvcc'r qts wg'uqp'gng'o gpvqu'egpvcrgu' f'gn'xgj' f'wru.'f'g'cnc'eqo r ngl'kf'cf' "v'epk'c' { . 'r qt'iq'vc'p'q.' r quggp'o c { qt'xcnqt'ci tgi cf'q's wg' qvtcu.'eqo q'ug'xgt^' gp'iqu'uki wkpvgu'cr ctvcf qu'0'

Gp'tguwo gp.'f'wcpvg'guvqu'f^2'ecf'cu'Vq { qvc'j' c'ko r qtwcf q'r tkpek'cm gpvg'cwqr ctvqu'cn' r c'f'uo'c'uw'xgl . 'c'r ctvkt'f'g'4234'gn'eqgh'ekpvg'f'g'r ctvqu'ko r qtwcf cu'uqdtg'xgj' f'wru'r tqf wvlf qu' j'c'kf'q'dclcpf'q'uquv'p'kf'co gpvg.'f'cp'f'q'ewgpvc'f'g'wp'r tqeguq'f'g'o c { qt'eqpv'p'kf'q'mqecm'gp'uwu' xgj' f'wru'0' Guvc' v'p'f'g'pek' v'k'p'g' eqttgr'v'q' eqp' gn' o c { qt' etgeko k'p'v'q' gp' r tqf weekop' { ' g'zr qtwckpogu'f'g'nc' h'ko c'gp'nc'ugi w'p'f'c'f^2'ecf'c'f'gn'uki m'0Ukp'go d'cti'q.'wpc'i' tcp'r ctv'f'g'ncu' cwqr ctvqu'ko r qtwcf cu'uqp'f'g'cnc'eqo r ngl'kf'cf' "v'epk'c' { 'o c { qt'xcnqt'ci tgi cf'q.'r tqxk'p'k'p'f'q'f'g' Vckrpf kc' *hub'o w'p'f'kn'f'g'nc'J' kwz+.'f'g'Dtcukl' *O gtequw+ { . 'ecf'c'xgl' 'o gpqu.'f'g'Lcr »p' *ecuc' o c'v'k' +0'c'r ctvkt'f'g'guvqu.'c'eqpv'p'wckep.'ug'gzco k'p'c'e»o q'ug'mgxctqp'c'ecdq'iqu'r tqeguqu'f'g' nqecm'k'cekop'f'g'r ctvqu.'ew' ngu'uqp'iqu'r tqxggf'qtgu'f'g'Vq { qvc'tcf'k'ecf'qu'gp'Cti'gp'v'p'c' { "e»o q' gxq'wckqpc'p'f'wcpvg'gn'r gt'f'q'f'q'dclq'guw'f'k'q'0'"

⁴²⁸"Gp'tgrckep'eqp'iqu'o qvqtgu.'iqu'f'k'g'v'k'qu'f'g'VCUC'ug' c'nc'p's wg'guvqu'up'wp'eqpl'v'p'v'q'f'g'r kgl cu'hw'p'f'kf'cu' { ' o gecp'k'cf'cu.'r qt'gn'q.'iqu'f'f'p' k'gu'c'nc'nc'qecm'k'cekop'f'g'guvqu'r ctvqu'gp'Cti'gp'v'p'c'gu'p'x'k'p'ew'cf'qu'c'ncu'g'uecucu' ecr'cek'cf'gu'mqecm'gp'hw'p'f'k'ekop'0'Nc'eqo r g'v'k'k'f'cf'f'g'ncu'r kgl cu'hw'p'f'kf'cu'ko r qtwcf cu'gu'o w'f'c'nc'gp'tgrckep' eqp'ncu's wg'ug'r tqf w'ep'q'ug'r wgf cp'r tqf wvlf gp'gn'r c'f'uo'c'f'iqu'gl'gew'k'qu'uqu'v'p'p's wg'ncu'ecr'cek'cf'gu'gp' r tqf weekop'f'g'o qvqtgu'ug'r g'f'k'gtqp'f^2'ecf'cu'c'v^a' u'gp'Cti'gp'v'p'c' { 'c'r ctvkt'f'g'c'nc'f'v'q'f'cu'ncu'v'g'to k'p'crgu'ko r qtw'p'q' gpuc'o drcu'ncu'r kgl cu'ko r qtwcf cu'f'g'iqu'o qvqtgu' *Nwku'N>r gl . 'gpvtgxkvc'r gtuqpcn'38B44244-0'

5.2 - Desarrollo de proveedores

" Gp'mqu'r tlo gtqu'c° qu'f g'qr gtceke»p'f g'VCUC"gr'ukngo c'f g'r tqf week»p'ug'dcu»"gp"wp" r rnpvc'f g'b qpvcig'f' 'pq'f g'hdteceke»p0Nc'ecuc'o cxtk' 'ug'tgugtxcdc'rc'r tqxkuk»p'f guf g'Lcr »p'f gr' 72' 'f g'hqu'eqo r qpgpvgu'f' 'uwdeqplwpvqu'o ° u'eqo r rglqu'f gr'r tqf wevq.'gu'f gek. 'f g'cs wgmqu's wg" uqp"f gucttqmqu"o ° u"uqhkuecf qu"q" f g'o c {qt"xcmt"ci tgi cf q" *P qxlcm'gv'cn0"4224+0' Ugi Àp" Gf wctf q'Mtqpdgti . 'rc'kpeqtr qtceke»p'f g'r tqxggf qtgu'hqecrgu'hwg'wp'r tqeguq'b w'f k'f'ekl" *"porque el requisito que tenía Toyota de exigencia de la autoparte que ponía en el vehículo no estaba en coherencia con lo que tenían los proveedores locales"* *Gf wctf q"Mtqpdgti . "gpvtgxkuc" r gtuqpcn"4: B4244+0'

" C"uw"xgl . "Cp'f'dcn'Dqtf gtgu."ug° cr" s wg"r ctc" gr'a tgc" f g"Eqo r tcu" c"Rtqxggf qtgu"rg" r kf kgtqp" f guf g'Lcr »p's wg" *"no traiga a nadie de Compras, que traiga a alguien de Producción. Porque al ser de producción, cuando hable con nuestros autopartistas entienda que si me entregan una parte bien hecha yo la puedo poner en la línea directamente. El precio lo vamos a negociar dentro de un par de años. Ahora lo que necesito es calidad"* *Cp'f'dcn'Dqtf gtgu." gpvtgxkuc" r gtuqpcn"39164243+0'Rctc"uqmwkqpc" guvqu'r tqdrgo cu."rc"ecuc"o cxtk' "f'rc'hk'cn'ug" gphqectqp"gp"wp"kpvgpuk'keceke»p'f g'rcu"tgrcekpgu"eqp"qu'r tqxggf qtgu'hqecrgu"/o gf kcpv"rc" cukuvpek'° eplec'gp'hqto c'f k'gevc'f guf g'rc'ecuc"o cxtk' "f'f'gr'v'cdclq'eqplwpvq'f'f g'eqqr gtceke»p/" tgcik' c'p'f q'wp'r tqhwpf q'v'cdclq'f g'f gucttqm'f g'r tqxggf qtgu"*Tco c."4226-<, 2+0'

" Ugi Àp'F cplgr'J gttgtq. ""

"

Gp'wp"gu'ecv'g'ic'f' i'ndcn'w'r tqxggf qt'gu'w'uqekq0Gu'lo r qukdn'v'gpgt'wp'r tq'f'ge'v'gzkquq'gp'gr'icti q'r'rc'q' uk'pq'v'gp² u'eqpvgpk'q' hqecr'eqo r g'k'k'xq0P q'v'k'p'g'ugp'v'f'q.'r'qt'gl'go r m.'h'cdt'lect'wp'r c'tci q'r'gu'gp'Dt'cukl'f' v'cgtm'gp'eco k»p0P q'xc0Gp'gug'ugp'v'f'q.'j go qu'j'gej q'wp'v'cdclq'f g'f gucttqm'f g'r tqxggf qtgu'f q'p'f g'rg" j go qu'f cf q'c'ecf c'wp'f'f g'gmqu'wp'target'f g'o gl'qtc'f g'equvqu'f'ecrk'cf' r ctc'ngi ct'c'qu'gu'p'f ct'gu's wg" p'geguk'° dco qu0Ewcp'f q'ctt'c'peco qu'eqp'gr'r tq'f'ge'v'ucd'f'co qu's wg'cni wpqu'r tqxggf qtgu'k'c'p'c'p'geguk'ct" c'f'w'c'f' "v'kgo r q0F kur wuko qu'gs v'kr qu'f g'v'cdclq'eqp'ecf c'r tqxggf qt" "wp"gu'v'go c'f g'k'pegp'v'xqu'o w'f " uko r ng0'Ngu'f ge'f'co qu's wg.'uk'g'peq'v'cd'c'p' gr'no q'f q'f g'c'j q'ttct" f'kg' "r guqu"gp"rc" gr'v'cd'q'ceke»p'f g'wp" eqo r qp'gp'v'g.'ek'peq'r guqu'ug'qu's wg'f'cd'c'p'gmqu'f' h'qu'q'v'qu'ek'peq'r guqu'k'c'p'c'wp'v'g'f'week»p'f gr'r t'ge'k'q'cni' s wg'p'qu'x'g'p'f'cp'gug'k'puwo q'°O k'k'p'Rt'q'f'we'v'xc."3: B4244+0'

"

Wpc" xgl " s wg" guvqu'r tqdrgo cu" k'p'ek'c'rgu" f g" r tqxkuk»p" f g" cwqr ct'v'gu" d'° u'lecu" h'wgtqp" uqmwkqpa' p'f qug."gu'v'cd'ng'ek'p'f q'wp'c't'g'f'gu'v'cd'ng'f g'r tqxggf qtgu."qu'k'pegp'v'xqu'r ctc'rc'r qu'v'gt'k'q't" h'qecrk' c'ek»p'f g'r ct'v'gu'f' "r'kg' cu'ug"eg'p'v'ct'q'p'gp" f'k'uk'p'v'qu"gr'go gp'v'qu0'Gp'r ct'v'ew'ct."u'q'dt'g'qu" d'g'p'g'h'ek'qu" f g'h'qecrk' ct' r'kg' cu."f guf g'rc"i'gt'g'pek'f g'Eqo r tcu'f g'VCUC"u'qu'v'k'p'gp" s wg'v'g'p'gt" r tqxggf qtgu"eg'v'c'p'qu'r g'to k'g'<3+"gr'c'j q'ttq'f g'equvqu'mi' f'v'k'ek'qu'f'f g'd'ctt'g'tcu'c'f'w'c'p'g'tcu."4+"

o c { qt "hgzkdtkf cf "cn'o qo gpvq "f g" tgerk ct "eco dlqu. " { "5+"o gpqt "xwpgtcdtkf cf "ht gpvg" c "mqu" r tqdrgo cu'f g' t'cpur qtvg's wg'r wgf cp' uwti kt0"

Cf go ^a u. "mqu" f kt gevxxqu" uquvkgpgp "s wg" gn' dgpghlekq "f g" t'gkpvgi tq "f g" et² f kq "hkuecn' r qt" eqo r tc "c" cwqr ct vgu' pcekqpcrgu' f g' r "Ng { "490485" gu' qvtq "grgo gpvq" ko r qt vcpvg's wg' ug' vkgpg" gp" ewgpvc " r ctc" r " mcecrk celsp " f g" cwqr ct vgu'²⁹ " Rqt " Ànko q. " mqu" glgewxxqu" ug^o crcp " s wg" gu" kpf kur gpucdrg' r qf gt "vpgt "wp" i tcp "xqno gp" f g' r tqf weekp "f g" xgj "f wru" r ctc " r qf gt "mcecrk ct" wpc " r kgl c. " { c " s wg. " uk' gzkuv " cri wpc " f hgt gpek " f g" equvq " eqp " r " ko r qt vcf c. " r " o c { qt " guecr " co qt vq c " gug' ghgevq " f g dkl q " c " s wg " mqu' r tqxggf qt gu' r wgf gp " dclct " gn' r tgekq " f g' r " r kgl c " cn' f kxk k " uuu' equvq " hklqu' r qt " wpc " r tqf weekp " o c { qt " Nwku " N » r gl . " gpvt gxkuv " r gt uqpcn " 38 B4 4244 +0

" Gn' r tqeguq' r ctc " tgerk ct " r kgl cu' hqecm gpvg " eqo kgl c " eqp " r " dÀus wgf c " f g " cngt pcvxqu " f g " r tqxggf qt gu' s wg' r wgf cp " uwo kpkvt ct " r cu' r kgl cu' q " eqo r qp gp vgu' I gp gtc m gpvg. " guvq " ug " f c " gp " hqto c " co r rlc " ewcpf q " ug' f gekf gp " tgerk ct " pwxcu' kpxgt ukppgu " { lq " eco dclt " gn' b qf grq " f gn' xgj " f wru " r tqf welf q " Tco c. " 4226 +0 Rctc " r " ugrgeekp " f g' r tqxggf qt gu. " Vq { qvc " Cti gpvpc " tgerk c " wp " cp^a ruku " f g' r " ecr celf cf " f g' guvqu' r ctc " cf cr vctug " { " ugt " hgzkdrgu' ht gpvg " c " ewcrs wkt " eco dlq " gp " mqu' r gf kf qu. " r rcl qu. " ecrk cf . " gur gekhcekelppgu " { " xqnÀo gpgu. " f g dkl q " c " s wg " o wej cu " xgegu " t guwnc " pgeguctkq " gpltpvct " f hgt gpvqu " eqpf lekppgu " gpf » i gpcu " { lq " gz » i gpcu " s wg " tgs wkt gp " f g " uw " tcr kf gl . " hgzkdtkf cf " { " cf cr vcekp " ghlec | 0Nc " cvgpekp " r wguv " gp " r cu' ecr celf cf gu' f g " mqu' r tqxggf qt gu' ug " f gdg. " r t'kpek r cm gpvg. " cn' j gej q " f g' s wg " r " go r t guc " hgu' qht geg' b ² vqf qu " { " v² eplecu " gur ge " hkecu' r ctc " gn' f gucttqm " f g' f gvto kpcf qu' r tqf wevqu. " ukgo r tg " dclq " r " f kt geekp " f g " VCUC 0Uki wkgpf q " c " mqu " glgewxxqu. " gn' qdlgvxq " f gn' cp^a ruku " f g' r cu' ecr celf cf gu' f g " mqu' r tqxggf qt gu' gu' cugi wtct " r " ecrk cf " { " r " gpvt gi c " f g " mqu' r tqf wevqu 0

Cu' " mqu' r cuqu' f g " VCUC " r ctc " mcecrk ct " wpc " r kgl c " uqp < 3 + " ug " kpxguki c " r " vtc { gevqtkc " f gn' r tqxggf qt " gp " gn' b gtecf q. " cpcrk cpf q " uk' gu' ecr c | " f g " cht qpvt " gn' vcdclq. " 4 + " ug " tgerk c " wpc " t' gwplp " f qpf g " r " cwqr ct vkuv " r t' gupvc " r " r tqr wguv " { " o " gpekpc " uuu' r qukdtkf cf gu " { " ecr celf cf gu. " 5 + " uk " VCUC " eqpukf gtc " s wg " gn' r tqxggf qt " vkgpg " r " r qukdtkf cf " f g " gpewcf tctug. " r cuvp " c " wpc " gvr c " f g " gzco gp " f g " eqo r gvxxkf cf " gp " r " ewcn' l' r kf g " wpc " eqvkl celsp " f g " wpc " r kgl c " { " ug " eqo r ctc " gn' plxgn' f gn' r tgekq " eqp " mqu' s wg " ug " r ci c " gp " gn' o qo gpvq " r qt " r " r kgl c " ko r qt vcf c. " 6 + " uk " gn' plxgn' f g " r tgekqu "

⁴²⁹ "Eqo q " ug " xkq " gp " gn' Ecr " f wru " 4 " guv " rgl " hgz " r tqo wi cf c " gp " 4238. " cwps wg " mqu' f kt gevxxqu " uquvkgpgp " s wg " eqp " r " rgl " f gn' 422: " vco dlk p " vgp " fpp " wp " lpegpvxq " uko krc. " cwps wg " mqu' r ci qu " uqfpp " vctf ct " o ^a u " vgo r q 0Ugi Ap " r " rgl " f g " 4238. " gn' r qtegpvc l' g " t' gkpvgi tq " f g " et² f kq " hkuecn' r wgf g " xctlct " f guf g " gn' 6 " " cn' 37 " " f gn' xcmq " gz " h' dtlec " f g " r cu' cwqr ct vgu' pcekqpcrgu' c " r cu' s wg " j ceg " t' ghgt gpek " r " rgl " . " f gr gpf kppf q " f gn' eqpvkpf q " mcecn' f gn' xgj " f wru. " c " r ct vq " f g " wp " o " plq q " f g " 52 " 0Gp " 4244. " VCUC " gtc " wpc " f g " r cu' qecu' vto kpcrgu' s wg " vgp " f " wp " 62 " " f g " eqpvkpf q " hqecnlgi Ap " r " b " gvqf qm " f " f " gvcn' c " gp " r " rgl " 0C wps wg " guv " kphqto celsp " p " q " gu' r Aditec. " ugi Ap " mqu' glgewxxqu. " Vq { qvc " gu^a " wpu' r cuqu' cf grcpvg " t' gur gevq " cn' t' guvq " gp " guv " f ko " gpukp " " Nwku " N » r gl . " gpvt gxkuv " r gt uqpcn " 38 B4 4244 +0 " Guvq " gu^a " gp " r fpgc " eqp " gn' kpf kecf qt " eqpvt wkl q " r ctc " guv " vgu. " r t' gupvcf q " gp " gn' Ecr " f wru " 40

guv^a "gp" rfp gc. "ug" eqp v p À c "wpc" gvr c "f g" f guctt qm q "f g" r tqxggf qt gu. "wpc" r ct v g" o^a u^v eplec" { " o gpqu'eqo gtekr0"

Rctc "guv" À nko q "gz kug" wpc" i gt gpek "gp" gn'f gr ct vco gpvq "f g" Eqo r tcu' mco cf c "Supplier Production Tracking Team" *URVV+ "rc" ewcn'ug" f gf kec" c "mqu" pwxqu" r tq { gevqu0 Gp" guc" pwxgc" gvr c "ug" kpxqmetcp "hqu" f gr ct vco gpvqu" f g" kpi gplgt "c" f g" Rtqf wevq" { "Ecrkf cf 0l . "f gr gpf kppf q" f g" rc" eqo r nglf cf . " vco dlk p" r wgf g" r ct vlek r ct" gn' f g" Nqi "f" vlek0' Nwgi q. " gn' f gr ct vco gpvq" f g" Rtqf week p "gu" gn' er kpv g "hpcn" f g" guv" r tqeguq *Nwku' N> r gl . "gpvt gxkuc" r gtuqpcn "38 134 14244+0"

Gp" ewcpvq "c" rc" pgi qekcek p. "ug" r wgf g" j cegt "wpc" f k v kpek p "gpvt g" cs wgmqu" r tqxggf qt gu" f g" Vq { qvc "hwgtc" f gn' r c "f" u" { "mqu" s w g" m "uqp" uqm "gp" Cti gp v kpc 0 Gp" gn' r tko gt "ecuq. "rcu" eqpf kekppgu" eqo gtekrngu' i gp gtc m gp v g" uqp "wpc" gz v g puk p "f g" rcu" eqpf kekppgu" guv d r g e k f cu' r qt "rc" ecuc" o c v k l . " m " s w g " h c e k k c " r c " p g i q e k c e k p " g p " V q { q v c " C t i g p v k p c " { " p q " e q p u k w { g " w p " h c e v q t " e t " k e q 0 ' N q u " c u r g e v q u " c " e q p u k f g t c t " g p " g n ' c e w g t f q " e q o g t e k r n ' e q p u k v g p " g p " u c d g t " u k ' g n ' r t q x g g f q t " r w g f g " f g u c t t q m c t " w p c " r k g l c " { " u k r w g f g ' e w o r n k t " e q p " m u ' t g s w g t k o k p v q u ' f g ' e c p v k f c f " { " r r c l q " f g " g p v t g i c 0 ' G p " g n ' u g i w p f q " e c u q . " r c u " e q p f k e k p p g u " e q o g t e k r n g u " { " r c " h q t o c " s w g " c f q r v e p " m u " c e w g t f q u " u q p " t g u r q p u c d k k f c f " f g " V q { q v c " C t i g p v k p c " c w p s w g " e q p " h p g c o k p v q u " i g p g t c n g u " f g " r c " e c u c " o c v k l " *Tco c. "4226+0"

Wpc" xgl "f gekf kf q" r qt "VCUC" gn' eqo kpp| q "f g" wpc" t g r e k e p " e q o g t e k r n ' e q p " w p " r t q x g g f q t . " u g " h k t o c " w p " c e w g t f q " i g p g t c n f g " e q o r t c u " g p " g n ' e w c n ' u g " g u v d r g e g p " m u " h p g c o k p v q u " d i a u l e q u " f g " r c " t g r e k e p 0 G p " g u v g " c e w g t f q " u g " r q p g " f g " b o c p k h g u v q " s w g " r c " t g r e k e p " g u " c " r c t i q " r r c l q " { " f g " d g p g h k e k q " o w w q 0 V c o d l k p " u g " g u v d r g e g " g n ' r r c l q . " r c " e c p v k f c f " f g " r k g l c u " f g " t g r q u l e k e p " r c t c " t g r w g u v q u " w p c " x g l " v g t o k p c f c " r c " u g t k g " f g " w p " o q f g m . " r c " g p v t g i c " g p " v k g o r q " { " h q t o c " { " g u v p f c t g u " f g " e c r k f c f 0 ' C f g o a u . " u g " f g v g t o k p c " r c " x q n w p v c f " { " g n ' e q o r t q o k u q " r q t " r c t v g " f g n ' r t q x g g f q t " f g " r g t o k k t " r c " k p v t x g p e k p " g p " u w u " r t q e g u q u " f g n ' r g t u q p c n f g " V C U C " r c t c " m i t c t " m u " g u v p f c t g u " f g " e c r k f c f " g u v d r g e k f q u " { " t g c r k l c t " r c u " o g l q t c u " e q t t g u r q p f k p v g u " g p " g n ' e c u q " f g " h c m u 0 "

Ncu" cev k x k f c f g u " e q p l w p v c u " { " f g " e q q r g t c e k e p " e q o k p p | c p " c " v g p g t " r t q v c i q p k u o q " g p " r c u " h c u g u " k p l e k r g u " f g n ' f g u c t t q m q " f g " r t q x g g f q t g u 0 ' G u v g " f g u c t t q m q " r w g f g " m g x c t " f g " f q u " c " v t g u " c o " q u " { " g u c " x c t k e k e p " u g " f g d g " c n ' p k x g n ' f g " v t c p u h g t g p e k c " v e p q n i k e c " s w g " u g " t g c r k l c " f g " V q { q v c " c " m u " r t q x g g f q t g u 0 ' G n ' v t c d c l q " e q p l w p v q " e q o k p p | c " e q p " g n ' c p a r k u k u " f g " m u " r t q e g u q u " r t q f w e v k x q u " f g n ' r t q x g g f q t " { " f g " r c u " p g e g u k f c f g u " g u r g e " h e c u " f g " V q { q v c " e q p " t g u r g e v q " c n ' c w q r c t v k u c 0 ' G u v q " g u " c u " f r q t s w g " r c t c " s w g " g n ' r t q x g g f q t " u g c " g n ' t g u r q p u c d r g " f g " h c d t l e c t " w p c " r k g l c " f g d g " k p e q t r q t c t " w p " r t q e g u q " r t q f w e v k x q . " c f c r v c t " q " e c o d l c t " w p c " o a s w k p c " q " e t g c t " w p c " p w g x c " r f p g c " f g " r t q f w e e k p 0 ' R t k p e k r c m g p v g . " g n ' c w q r c t v k u c " f g d g " e q o r t g p f g t " g " k p e q t r q t c t " m u " r t k p e k r k u " t g e v t g u " f g n ' V R U 0 ' N c " v g p f g p e k c " g u " s w g " g n ' r t q x g g f q t " c f s w k g t c " r c " o g v q f q m i " c " { " g p " w p " h w w t q " u g " o c p g l g " e q p " c w q p q o " c " *Tco c. "4226-343+0"

" Ukp" go dcti q. "vo dl2p" gzknug"wp"nfb kg" c" f lej q" guxf q" f g" cwqppqo "c0'Rqt" glgo r nq." o kprvcu'qvtcu'vgo kpcrgu'gpecti cp" c"uwu'r tqxggf qtgu'rc'etgcek»p" f g'ru'bo cvtlegu. "Vq{ qvc'gu'wpc" f g'ru'r qecu's wg'gu'f wg° c" f g'uwu'r tqr kqu'o qrf gu'Ugi Àp"Gf wctf q"Mtqpdgti ." "las matrices - tanto de estampados como de plásticos inyectados- son nuestras y las utiliza el proveedor mientras dure el contrato de producción (...)" "Esto nos ha salvado más de una vez de conflictos internos con los proveedores. Ante cualquier dificultad para cumplir, nosotros recuperamos la matriz y se la podemos entregar a otro fabricante" *O qvqt3."3174236+02: "Gn'equuq" f g'ecf c" o cvtk "f g'guvco r cf q'tqpf c"gn'bo km»p" f g'f »rt gu" { "gu'wpq" f g'hqu'equuqu'bo a u'ko r qtvcpgu'r ctc"wp" cwqr ctvkvuOF g'guv'bo qf q."Vq{ qvc'ngu'r qukdkrkc"cj qttctug'guc'kpxgtuk»p." r gtq" c'rc'xgl "bo cpvkgpg" wp" gutk»vq" eqpvtqn'uqdtg" gmqu." tgvplkpf q"wp" o c{ qt" o cti gp" f g" ceek»p" gp" ecuq" f g" f gekf k" eco dkt" f g'r tqxggf qt."cvps wg'guvq'uwegf c"gp" guccucu'qecukqpgu' " "

" Rqt" qvtq' hrf q. "Vq{ qvc'Cti gpvkc" vkgpg" uw'r tqr kc"cuqekcek»p" f g'r tqxggf qtgu'f guf g'4228." rc"Cuqekcek»p" f g'Rtqxggf qtgu'f g"Vq{ qvc'Cti gpvkc" *CRVC-0UKdkgp" qvtcu'vgo kpcrgu"gp"gnr c"ju" vo dl2p" vkgpg" i twr qu" f g" cwqr ctvkvu. "vrgu" eqo q" Hqtf " { "Xqmuy ci gp." guvqu" gu³ p" o a u" qtkpvcf qu" c" ewgukqpgu" eqo gtekrnu. "r tkpek cm gpvg." pgi qekcekqpgu" f g'r tgekqu'0Gn'gphqs wg'f g" CRVC" gu'f kkvqv " { c" s wg' gu³ " o a u" qtkpvcf q" c" gutcvgi kcu" f g' f gucttqmq. "eqo wplecek»p" eqp" r tqxggf qtgu. r rcpgu'f g'etgeko kpvq. r tqi tco cu'f g'bo glqtc'eqpvkpw. 'cevxxkf cf gu'f g'kaizen. "gpvtg" qvtcu'0Gu'f gek. "gu³ "bo a u'xkpewrcf q'cn'VRU" f k gevt" f g'go r tguc"cwqr ctvkvu"bo kgo dtq" f g'CRVC." gpvtgxkvu" r gtuqpcn"421344244+0"

C"uw'xgl. "VCUC" qti cpk c"vqf qu"muc"o qu"vpc"eqpxgpek»p"cpwcn'f g'r tqxggf qtgu gp"gn' o cteq" f g"CRVC'0Gp" gm" r ctvkr cp"cwqtkf cf gu" f g"Vq{ qvc" O qvt" Eqtr qtcvkv. "f g"Vq{ qvc" Cti gpvkc. "f g"Vq{ qvc'Dtcukn' { "f g'ru'r tkpek crgu"go r tgucu'r tqxggf qtcu'0Cn'lug'qvqi cp'r tgo kqu" gp"tgu'ecvqi qt"cu'«ecrkf cf. "mji "jukec" { "equuqu'0Cuko kuo q. "ug'r tgo k"cn'bo glqt" r tqxggf qt" f g'ecf c" c° q" { "vo dl2p"ug'tgcrk cp"gpvtgi cu'f g'r tgo kqu'kpvgtpeckqpcrgu"gp" Lcr »p0"

Cf go a u. "VCUC" tgcrc k" eqpuvcpygo gpvg"cevxxkf cf gu'f g"ecr cekcek»p"eqp" r tqxggf qtgu. " eqp"gn'qdlgvq" f g'hqtvrgegt"rc"i guk»p" f g'vgo cu'ercxg"gp"uw'ecf gpc" f g'xcmt0C"vtx² u'f g"guvqu" cevxxkf cf gu'ngu'dtkpf cp" c"uwu'cwqr ctvkvu"kpwtwo gpvqu'r ctc" hqtvrgegt" { "o glqtct"rc"ugi wtkf cf " { "rc'ecrkf cf 0Gpvtg'cni wpcu'f g'guvqu'ug'gpewgpvtcp<3+"Jishuken" d³ uleq<cevxxkf cf "f kki kf c" c"vqf qu" mqu" r tqxggf qtgu"cwqr ctvkvu"eqp" o kcu" c"rc" o glqtc"gp"mqu" r tqeguqu. "4+"Jishuken"cxcp| cf q< cevxxkf cf " s wg"dwuec" o glqtct" r tqeguqu"gp" v² to kpqu" f g"ecrkf cf. " r tqf wvxxkf cf. "ghkekpgkc" q" gur cekq"eqp"wpc"o gvqf qmji "c"et"kec. "5+"Ji-kotei Kanketsu<guc"cevxxkf cf " r tqr qpg"eqpuvt wtk"rc"

42: "F g'vqf qu'bo qf qu"gnitgeco dlq" f g'r tqxggf qtgu'f g'VCUC" tcf kcf qu"gp"Cti gpvkc"hwg'bo w' hko kcf q."eqo q'ug'xgtª " gp"bo c{ qt" f gvcng"bo a u'cf grcpv0

ecrkf cf " f gpvtq" f gn' r tqeguq" r tqf wekxq" f g" o qf q" s wg" pq" ugc" pgeguctkq" ghgewct" eqpvtqngu" r quvgtkqtgu" c' r' r tqf weekp" f' g' r' cu. "6+ Cevkxf cf " f' g' r' tqxggf qt" f' g' r' ppgc" o qf grq" / *Problem Solving* ó E f' ewru" f' g' ecrkf cf < c' vtcx² u' f' g' guvc' ug' lpeqtr qtc" gn' Ukuvgo c' f' g' Rtqf weekp" Vq{ qvc" c' ecf c' r' tqxggf qt" c' hq" f' g' hqtvrgegt" { " o glqtct' uw' ugi wtkf cf . " ecrkf cf " { " ukuvgo cu' f' g' equvqu0"

Gp" tguwo gp. " VCUC" co r rñs" hwtvgo gpvg" uw' dcug" f' g" r' tqxggf qtgu" hqecrgu" f' guf' g" uw' kpuvcrekxp" gp" gn' r c' u0Guvq" ug" j k q" eqp" wpc" r ctvek celp" cevkc" f' g' r' vgo kpcn' gp" hqu' r' tqeguqu" f' g" o glqtc" f' g' r' cu" cwqr ctvkucu. "qvqi cpf q" f' kulpvqu" r' tqi tco cu" { " cevkc" f' g' u' f' g' gucttqmq" f' g" r' tqxggf qtgu" hqecrgu. " r' gtq" vco dkp" b' cpvplkpf q" c' nqu" p' kxgrgu" f' g' gzki gpekc" { " eqpvtqnludtg" guvcu" hto cu0Gpvtg' hqu" f' kulpvqu" ecpcrgu" f' g' eqqr gtcekp" f' g' VCUC" eqp" uwu' r' tqxggf qtgu" ug' gpewgpvtcp" gn' *Supplier Production Tracking Team* *URVV+ r' ctc" r" kpenwukxp" f' g' wp" pvwxq" r' tqxggf qt. " r" Cuqekelp" f' g" Rtqxggf qtgu" f' g" Vq{ qvc" Cti gpvkpc" *CRVC+ " { " f' kxgtucu" cevkc" f' g' u' f' g" ecr cekcekp" { " hqtvrgek" lgpvq0F g' guvg" o qf q. " ug' r' wgf g' xgt" e» o q' ug' l' plekcp" hqu" x' p' ewru" gpvtg" r' vgo kpcn' { " hqu' r' tqxggf qtgu" hqecrgu" grgi kf qu0"

"

5.3 - Proveedores de Toyota en Argentina

Nqu' r' tqxggf qtgu" f' g' Vq{ qvc" Cti gpvkpc" ug' r' wgf gp' emukhlect" gp' tgu' i' twr qu' f' kulpvqu" ugi Ap" uwu' qt" f' gpgu" < c' + O wnkpcckqpcrgu" lcr qpgucu. " d+ O wnkpcckqpcrgu" p' q' lcr qpgucu" { " e+ Nqecrgu0²: " Gp" gn' c° q" 4242. " VCUC" h' g' eqo r' tcdc" f' k' g' vco gpvg" c' 84" cwqr ctvkucu" f' gn' r' tko gt" c' p' kmq0Guv" r' kuv" f' g" r' tqxggf qtgu" gu" eqp' h' k' f' gpekn" ukp" go d' cti q. " r' ctc" guvc" v' guku" ug" r' w' f' q" t' g' eqpvt wkt" gn' i' twr q" f' g' r' cu" r' t' l' pek' c' r' gu" 73" cwqr ctvkucu" gpvtg" g' r' cu0³²" ""

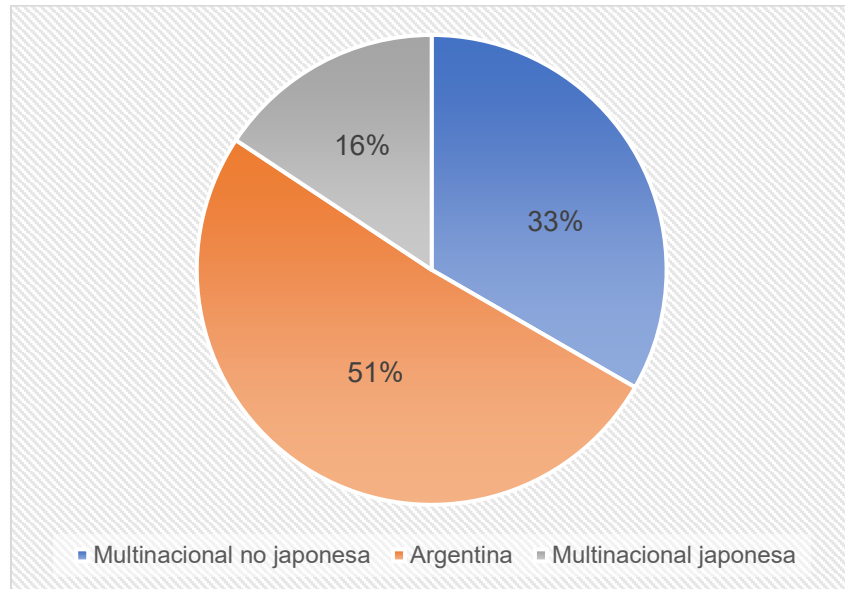
Cu' f' emukhlect" f' q" c' r' cu" hto cu' f' g' guvg" i' twr q. " ug' r' wgf g" o gpekpct" s' wg" hqu' r' tqxggf qtgu" o wnkpcckqpcrgu" f' g' qt' ki gp' lcr qp² u' gtcp" gn' 38' " f' gn' v' c' n' f' g' r' cu" cwqr ctvkucu" f' gn' r' tko gt" c' p' kmq" f' g' VCUC" *xgt" I t^a h' k' eq" X/5+0' P qto cm gpvg. " guvcu" uqp" h' k' c' r' gu" f' g" go r' t' gucu" lcr qpgucu" s' wg" r' tqxggp" c" Vq{ qvc" lcr » p" { " c" uwu" u' wdukf kctkcu" gp" gn' o' w' p' f' q0Guv" r' tqegf ko lgpvqu" i' gpgtcm gpvg" uqp" etgcf qu" gp" r' e' cuc" o' c' v' k' f' g' r' vgo kpcn' { " v' c' p' u' h' t' k' f' qu" c' r' cu" h' k' c' r' gu" f' g' r' cu" eqtr qtcekp" f' g' d' k' f' q" c' s' wg" r' u' g' f' g' e' g' p' v' c' n' r' qugg" eqp' v' c' v' q' h' w' k' f' q" { " f' k' g' v' q' eqp" r' e' cuc" o' c' v' k' r' tqxggf qtc0Cf go ^a u. " r" o c { qt' r' ctvg' f' g' guvcu" eqo r' c° f' cu' ug' k' p' u' v' c' t' q' p' gp" Cti gpvkpc" c' r' ctvk' f' gn' follow *sourcing*. " gu' f' gek. " uki w' l' g' p' f' q" c' r' u' wdukf kctk" f' g' Vq{ qvc" gp" gn' r' c' u" *xgt" Vcdrc" 2/35" f' gn' C' p' g' z' q" Guvcf f' u' l' k' eq+0' C" uw" xgl. " ewcvtq" f' g' guvcu" qej q" go r' t' gucu" lcr qpgucu. " uqp" r' ctvg' f' gn' i' twr q" Vq{ qvc" c" p' k' x' gn' i' m' d' c' n' *F' g' puq. " Lgn' C' w' qo q' v' k' x' g. " Vq{ qvc" D' q' u' j' q' m' w" { " Vq{ qvc" V' u' w' u' j' q+0"

"

⁴²: "Rctc" xgt" gn' f' g' v' c' n' g' f' g' guvcu" k' c' r' cu" Vcdrc" 2/35" f' gn' C' p' g' z' q" Guvcf f' u' l' k' eq0

⁴³²: "Rctc" eqp' u' w' n' c' t' u' q' d' t' g' guvc' t' g' e' q' p' u' t' w' e' k' p' x' g' t' r' e' P' q' v' c' O' g' v' q' f' q' n' i' k' e' c' 80'

Gráfico V-3 - Proveedoras autopartistas del primer anillo de Toyota Argentina según su país de origen (n=51)²¹¹ (2020)



Hwpgv<gndqtc&p'r tqr kc'gp'dcug'c'CHCE. 'f cvqu'f g'CF IO TC. 'dncrpegu'f g'VCUC' '{ 'gpv'gxkvcu'0'

Gp"ugi wpf q"mi ct. "ug"gpewpvtcp"qu'r tqxggf qtgu"o wmpcekqpcrgu"eqp"r t gugpek"gp" Cti gpv'pc"*55' +. 'qu'ewcrgu'uqp"go r tgucu'gz vtcplgtcu's wg'r quggp' h'k'crgu"gp"gn'r c'f'u'0'Nc'o c { qt" r ctvg'f g" guvcu"uqp"f g"GGWW": "f g"39+" { "nwi q"v'gu'f g" H'cpek'0' H'pcro gpv. "ug"j cmcp"qu" r tqxggf qtgu'f g"ecr k'crgu"mqecrgu"*73' -0'Guc'f k'v'kdw&p"eqp"o c { qt"r t gugpek"f g"ecr k'crgu" pcekqpcrgu"gu"kwawcn'lpenwq"gp"qvtcu" h'k'crgu'f g"Vq { qvc"gp"gn'o wpf q."s wg"uwrgp"v'p'gt"wp" r qtegpvlg'lw' r g'k'q'cn'; 2' 'f g'r tqxggf qtgu'f qo 2' u'w'equ'f g'qtki gp'gz vtcplgtq' *T wdkq'gv'cn'0'4244-< 32+'c'wps wg'gp"eqo r ctcel&p"eqp"gn'ecu'f g"Vq { qvc'Uw' a h'lec'guc'f k'v'kdw&p" '{ "gur gek'rk' cel&p" f g'rcu'cwqr ct v'kvcu'ugi Ap'lw'qtki gp'pq'v'k'p'g'i t'cp'f gu'f k'gt'gpekcu"*gl'gew'k'x'q'f g'Vq { qvc'Uw' a h'lec." gpv'gxkvc'v'gn'h'p'k'ec."37 l6 l4243-0'

Ukp'go d'cti q.'c'r guct'f g's wg'b' a u'f g'rc'o kcf'f g'h'qu'r tqxggf qtgu'f g'VCUC' uqp'f g'ecr k'cn' mqecn'ecdg'f gucect's wg'rc"i t'cp"o c { qt'f'f g" guvcu'ug'f gf k'ecp" c"ce'v'k'k' cf gu"o a u'uko r ngu. 'v'crgu' eqo q"rc" h'cdt'lecel&p" '{ "r tqxk'k'p"f g'r ctv'gu"o gv' r'ecu" '{ "r r' u'w'ecu'0' O w'ej cu'f g" guvcu'cwqr ctv'gu." cf go a u.'r quggp'x'gpv'lcu'h'gp'v'c'rcu'ko r qt'w'f cu'r qt'ugt'r k'g' cu"bulky, rcu'ewcrgu'uqp'f h'f'ek'rgu" '{ " equv'qucu'f g'v'cpur qt'v'ct'0"

⁴³³"Gu"ko r q't'v'p'v'g'f gucect's wg'gn' r'k'v'cf q"q'd'v'p'k'f q" gu'f g"73" cwqr ct v'kvcu'f k'g'v'cu'0'F gu'f g'gn'f gr ct'v'co gp'v'q'f g' Eqo r t'cu'f g'Vq { qvc' u'qu'v'k'p'p's wg'gp'4242'gn'v'q'v'cn'f g'r tqxggf qtgu'f k'g'v'cu' uqp'84.'c'wps wg'guc'h'k'v'c'gu'eq'p'h'k'f g'pek'cn'0' F gu'f g'CF IO TC' u'qu'v'k'p'p's wg'f gn'v'q'v'cn'f g'84'cwqr ct v'kvcu'gn'r qtegpvlg'f g'ecr k'crgu'mqecrgu'gu'f gn'82' . 'o c { qt" s wg'h'q'c'p'cn'k' cf q'gp'rc'o v'g'v'c'f g'guc'v'g'u'0'R'et'c'o r r'k'ct' u'q'd't'g'g'v'g't'g'rg'x'co k'p'v'q'eq'p'w'v'ct'rc'P' qvc'0' g'v'q' q'n'i k'ec' 80'

Gpvtg'iqu'ukungo cu'f'g'cwqr ctvgu'eqo r nglqu'{'f'g'o c {qt'xcmt's wg'ug'hcdtkcep'gp'gnr c'ju' ug" gpewgpcp<' cktgu" ceqpf lekqpcf qu" *F gpuq+." culgpvqu" *Vq { qvc" Dquj qmw+." ukungo cu' f'g' kphqto cek>p" {" gpvtgvpko lgpvq" *infotainment+ " *O ki qt+." ecdrgu." vcdrgtqu" {" r cpgrgu" f'g' kpuvwo gpvqu" *f c| cnk+ " *Nwu" N>r gl ."gpvtgxkuc'r gtuqpcn "38 B4 4244+0'Gu'f gekl."s wg."uk'dkcp'rc" o c {qt'f'g'mqu'r tqxggf qtgu'tcf kecf qu'gp'gnr c'ju'f'g"Vq { qvc"uqp'f'g'ecr kcrngu'pcekqpcrgu."uqmq' wpq'f'g'gmqu."O ki qt."hcdtkc'r ctvgu'eqo r nglcu'Nqu'qvtqu'tgu'r tqxggf qtgu'f'g'r ctvgu'f'g'o c {qt' xcmr't'ci tgi cf q'uqp'cwqr ctvku'ci' mdcrgu'lcr qpgucu."f qu'f'g'gmcu'f'gnr' t wr q"Vq { qvc" *F gpuq" {" Vq { qvc'Dquj qmw+0Cj qtc'dkcp."c'r ctvkt'f'g'guxqu'f'cvqu'ci tgi cf qu'cn'4242'gu'ko r qtvpvg'eqpgegt" e>> o'ug'hgi >"c'gux'ukwcek>p'gpvtg'rcu'r tkpek crgu'cwqr ctvku'f'g'VCUC."s w'vr q'f'g'r tqeguqu' f'g' upgrading" ug" mgxctqp" c" ecdq" {" s w'vr q'f'g' gobernanza" guvdrgek>" VCUC" eqp" uuu' r tqxggf qtgu'Guq"ug"tcdclc" c"eqpvkpwcek>p"gp'dcug" c"rc"tc { gevqtk" f'g'rcu'r tkpek crgu'qpeg' cwqr ctvku'f'g'VCUC'tcf kecf cu'gp'gnr c'ju'0

5.4 - La trayectoria de las principales proveedoras autopartistas de TASA radicadas en Argentina

5.4.1 - Proveedores multinacionales japoneses

5.4.1.1 - Denso

" F gpuq" Cti gpvkc" gu" rc" hkrcl' mrcn' f'g" rc" ukungo kuc" o wnkpcckqpcn' lcr qpguc" F gpuq" Eqtr qtcvqp."wpc'f'g'rcu'o a u'i tcpf gu'f'gn'o wpf q" {" r ctvg'f'gn'I t wr q"Vq { qvc'34" I mdcro gpvg." F gpuq" r tqf weg" wpc"i tcp" xctkcf cf "f'g' ukungo cu' eqo r nglqu" r ctc" xgi f'wqu" gpvtg" mqu" s wg" ug" gpewgpcp<' ukungo cu' v'to lequ." powertrain" *ukungo cu' f'g" eqvtqn+." ukungo cu' grgext>plequ." ukungo cu' gr'extlequ." o qvtgu" gr'extlequ." gpvtg' qvtqu'0' Gp" Cti gpvkc."rc" hto c"ug" f'gf'lec" c"rc" r tqf wek>p" f'g' vqf q' gn' ukungo c" f'g' erko cvk' cek>p." kpnw { gpf q" eclcu' f'g' cktg' ceqpf lekqpcf q." o cpi wgtcu' f'g' ci wc." tcf kcf qtgu' f'g' ecnghceek>p." eqpf gpu'cf qtgu." wdg' f'cu." hmtqu' f'g' cktg." gpvtg' qvtcu'r ctvgu'0

" Nc'cwqr ctvku' lcr qpguc' mgi >" cnr c'ju' gp'3; ; 8. f'g'rc' o cpq' f'g' VCUC." cwps wg'ug' kpuvcr>" gp'E>tf qdc' r ctc' r tqxggtr' vco dk' p" c' Hkv' Cti gpvkc'0'35" Gr'cewgtf q' eqp'rc' eqo r c' f'g' qtki gp" kcrkcpq'ug' f'gtkxc' f'g'wp' joint-venture s wg' F gpuq' vgp' f'c' eqp'rc' cwqr ctvku' kcrkcp' s wg' gtc' r ctvg'

⁴³⁴"Gp"v'to lppu'i gpgtcrgu."gp'gnr'ki m'ZZ K'gr'rkf' gtc| i q'f'gn'cwqr ctvkuo q'i mdcn'ug'f'kur wc'gpvtg'F gpuq' *Lcr >p+." Dquej "Crgo cplc+ {" O ci pc" *Ecp'cf a -0

⁴³⁵"F gpuq" Eqtr qtcvqp'rgu'r tqxgg'ukungo cu'c'vq'cu'rcu'vgo kpcrgu'f'gn'o wpf q" {" guv' r t'gugpv'gp'rc' o c {qt'f'g'mqu' r c'ju'eqp'kpf wvkc'cwqo qvtk' ."ukp" go d'cti q."uu'r tkpek crgu'erlcpvgu'i mdcrgu'uqp'rcu'vgo kpcrgu'cwqo qvtlegu' lcr qpgucu'Ugi Ap'gn'f'k'gevqx'f'g'F gpuq' Cti gpvkc'gpvtgxkuc'f'q."gux'vr q'f'g'r lgi cu'eqo r nglcu."cnleqo q'rc'ecle'f'gn' cktg'ceqpf lekqpcf q."uqp'eqo r tcf cu'c'ukungo kuc'u'i mdcrgu'r qts wg'q'htgegp'wpc'cnc'eqphcdk'cf' r ctc'rc'vgo kpcn'0' Gr'tlgu' q'f'g'vpgt' r tqdrgo cu'gp'gux'vr q'f'g'ukungo cu'gu'cnq" {" rcu'vgo kpcrgu'pgegu'kcp" i ctc'p'f'cu' f'g'uw' dwgp' hwpekqpc' kpvq' *Lwcp' P qxgm'gpvtgxkuc' r gtuqpcn' 49 17 4244+0

f gnl twr q'Hlcv'O ci pgwkO ctgnk'gp'Gwtqr cOC'r ctvt'f g'gmj.'gp'E>tf qdc'ug'tgr nk>'wpc'go r t guc"
eqplwpc'uko kct'mco cf c'O ci pgwk'O ctgnk'F gpuq0Gp'gnlc° q'4223'F gpuq'Eqtr qtcvkp'eqo r t>"
rc'f kxkuk>p'f g'ukugo cu'v'to lequ'f g'rc'cwqr ct vkuc'kcrkpc"{' f guf g'gug'o qo gpvq'eqo gp| ctqp'c"
mco ctug'F gpuq'Cti gpvkpc0"

" Gnl'ekgtt'f g'Hlcv'Cti gpvkpc'c'kpgu'f g'3; ; 2"ko r cew>'pgi cvkco gpvg'gp'F gpuq.'s wg.'uk"
dkp'r tqxg'f'c'Vq{ qvc'f wcpvg'iqu'r tko gtqu'c° qu'f gnl'4222'°cr tqzko cf co gpvg'42022'wplf cf gu"
cpwrcgu+.'guy'pq'rg'i gpgtcdc'rc'gucrc'uwkckpvg'r ctc'ugt'tgpvdr0F g'guy'o qf q.'c'r ctvt'f g"
pgi qekckppgu'kpgtpeckppcngu'gptg'rcu'ecucu'o cv'legu'f g'F gpuq"{' Hlcv.'rc'cwqr ct vkuc'ler qpguc"
eqo gp| >'c'gzt vtctrg'c'Hlcv'Dtcukr' ctc'eqo r gpuct'rc'ec'f'c'f g'rc'r ctvg'cti gpvkpc0Lwcp'P qxgm"
i gtgpvg'f g'F gpuq'Cti gpvkpc'f guf g'4227.'uqukpgg's wg""*las empresas globales hacen acuerdos internacionales. Les dijeron que no podíamos cerrar la fábrica de Córdoba que nos hicieron poner hace 5 años, que necesitaban venderle productos a alguien*""*Lwcp'P qxgm'gptgkuc"
r gtupcn'49 I7 4244-0³⁶"

" Nwgi q.'gn'etgelo kgpv'f g'VCUC'ngu'f kq'gn'xqno gp'uwkckpvg'r ctc'i ctcpxk'ct'rc"
tgpvdkrkf cf.'cwps wg'rc'vgo kpcn'ler qpguc'etgek>'cvpq's wg'iqu'r tqdrgo cu'wti kgtqp'r qt'qvtq"
rcf q'rcu'kpxgtukppgu's wg'ug'vpp'cp's wg'j cegt'r ctc'i ctcpxk'ct'rcu'r ctvgu'r ctc'guqu'pkxgrgu'f g"
r tqf week>p0'Cn'tgur gevq.'iqu'f k'gexqu'eqo gpvc'p's wg'wxkgtqp's wg'vcdclct'hwgtvgo gpvg'cn"
kpgtkqt'f g'rc'qti cpl'cek>p' kpgtpeckppcni' r ctc' eqpugi vkt'rcu' kpxgtukppgu' pgeguctku' r ctc"
cwo gpvt'rc'ecr cekf cf'f g'r tqf week>p0'P qxgm'uqukpgg's wg'F gpuq'pq'vkgpg'i tcp'kpgt²u'gp"
kpxgtk'gp'Cti gpvkpc'f gdlf q'c'uw'xckxpggu'geqp>o lequ'f'rc'ko r qukdkrkf cf'gp'f kxkpvqu'c° qu'f g"
i kct'wkrk cf gu'{' f kxkf gpf qu0'Qvtc'r ctvg'f g'guc'kpxgtuk>p'rc'r wf kgtqp'ewdtk'eqp'et² f kqu"
HQP F GCT'f gnl' qdkgtpq'pckppcni'cti gpvkp'gptg'4236"{' 4238.'f g'rc'bo kuo c'hqto c's wg'iq'j k q"
Vq{ qvc0³⁷" F g' guy'o qf q.'cwo gpvtqp'rc'ecr cekf cf'f g'r tqf week>p'{' r wf kgtqp' r tqxgg"
ucvkrcvqtko gpvg'c'rc'vgo kpcn'ler qpguc0Cn'4243.'F gpuq'hcdtlecdc'crtgf gf qt'f g'36'r kgl cu'f g"
iqu'xgj 'fawqu'f g'VCUC.'gptg'iqu's wg'ug'gpeqvtcdcp'<eclcu'f g'ckg.'eqpf gpucf qtgu.'tcf kcf qtgu."
r kgl cu'r r'f ukcu.'o cpi vgtcu.'wdqu.'gptg'qvtcu0"

" Nc'tgrck>p'f g'F gpuq'eqp'Vq{ qvc'gp'Cti gpvkpc'gu'r ctvewrcto gpvg'f hgtgpvg'cnf gnl'guy"
f g'rcu'cwqr ct vkuc's wg'pq'uq'r ctvg'f gnl' twr q'Vq{ qvc0Rtkpek'cm gpvg.'f gdlf q'c's wg'F gpuq"{' c"
vkgpg'kpeqtr qtcf q'gn'r tqeguq'r tqf wexq'f gnl'VRU"{'rc'hkquqf'f'f g'Vq{ qvc0Rqt'iq'vcpvq.'pq'ug"
ngxpc'c'ecdq'vcpvcu'cevxkf cf gu'f g'f gucttqm'f g'r tqxggf qtgu'q'bo glqtcu'f g'ecrkf cf 0Cuko kuo q."

⁴³⁶"Guy'eqpvtcuc'eqpukf gtdrgo gpvg'eqp'gn'ecua'f g'Guydcp'Eqtg'gtq.'cwqr ct vkuc'iqecni's wg'ug'f gucttqmt^a "o^a u"
cf gnpvg.'gp'gn'ewcn'cpvg'wpc'ukwcek>p'r ctgek'c.'pq'ng'f kgtqp'p'p' wpc'uqnek>p'f guf g'Hlcv"{' guwxq'cn'dqtf g'f g'rc"
s wgdct0'
⁴³⁷"Gnl'et² f kq'HQP F GCT'ewdtk>'&62'o kmpgu'f g'iqu'&74.7'bo kmpgu's wg'equ>'rc'kpxgtuk>p'°HQP F GCT.'4237'0"

reucevklcf cf gu'f g'K F 's wg'F gpuq'ingxc'c'ecdq'gp'Cti gpvpc'uqp'gucucu."{c's wg'gucv'hwpekpqgu' r ctc'rc'J kwz'ug'tgcrk cp'gp'Vckrpf kc0

" Rqt'qvtq'rcf q."F gpuq"Cti gpvpc'ingx»"c'ecdq'pgi qekcekppgu'mecrgu'r ctc'cdcugegt'f g' r kgl cu'cn'Rgwi gqv'428."j cuvc"s wg'eco dl»"uw'r rncvchqto c0C"uw'xgl ."r tqxg{gtqp'r ctvgu'r ctc'gn' T gpcwn'Erffq"O f'f guf g'gn'4234"cn'42380'Gp"4239."c'r ctvt'f g'rc'mgi cf c'f g'P kuucp'cn'r c'u." eqo gpl ctqp'c'xgpf gtrg'r ctvgu'c"guvc'vgtto kpcn0"

" Gn'r tlpekr cn'eqo r gvkf qt'f g'F gpuq"gp"Cti gpvpc"gu"O kti qt."gn'ewcn'ng'r tqxgg"ukvgo cu' vto lequ'c'Xqmuy ci gp."Hqtf."{ 'I gpgtcn'O qvqtu0'Gp'r ctvkwrt.'O kti qt'guv' tcf kecf q'gp'Vkgttc' f gn'Hwgi q."cr tqxgej cpf q'mu'dgpghekqu"ko r qukkxu"f g'rc"r tqxkpek."{ "F gpuq"gp"E»tf qdc." f qpf g'r qugg"xgpvcl'r qt'rc'egtecp'f'i gqi t'a hlec0'Rqt'qvtq'rcf q."F gpuq"wo dl»p"eqo r kvg"eqp" O kti qt'gp'ukvgo cu'grgevt»plequ."cwps wg'rc'cwqr ctvkw'lc'cr qpguc'pq'vkgp'g'tcf kecf c'uw'f kxkuk»p" f g'grgevt»plec'gp"Cti gpvpc."ukpq'gp'Dtcuk0"

P q"qducpvg."cni wpu'r tqf wevqu'grgevt»plequ'cnco gpvg'uqhwkecf qu's wg'hcdtlec'F gpuq" gp'Dtcuk⁴³⁸"{ "Lcr »p"pq"uqp"r tqf wekf qu'r qt"O kti qt0'Rqt'gigo r mq."rc'r kgl c"mco cf c'*Engine Electronic Control Unit* *GE W+. "s wg'gu'rc"eqptqmf qtc'grgevt»plec'f gn'o qvqt."gu'wp'r tqf wevq" eqo r nglq"{"et'f'keq'f gdlf q" c"s wg'f g'gmc'f gr gpf g'i tcp'r ctvg'f g'rc"ugi wtkf cf "s wg'qhtgeg'gn' xgj f'ewr0'cn'tgur gevq."O kti qt'j c"vplf q'kpvpekppgu'f g'vcdclct'gp"eqplwpvq"eqp'F gpuq'r ctc' f gucttqmt" guvg" vkr q'f g'r tqf wevqu."r gtq'f guf g'rc"ecuc"o cvtk' f g'F gpuq"Eqtr qtcvkap"j cp" uquvplf q's wg'gug'know-how"pq'ug'r wgf g'vcpuo kkt'c'qvtq'r tqxggf qt0'Ugi Àp'P qxgm""*tenemos un know-how de 40 años de producir. No cualquiera lo puede localizar. Necesitamos años de capacitación para poder llegar a ese nivel de calidad*" *Lwcp'P qxgm"gpvtgxkuc"r gtuqpcn" 49 17 14244-0)

F g'guvg'o qf q."ug'r wgf g'f gucect's wg'guvc'cwqr ctvkw'c'i mdcn'mgi »"c'Cti gpvpc'c'r ctvt' f g'rc'tcf kecek»p'f g'Vq{qvc'gp'gn'r c'u"{'f g'cewgtf qu'kpvtpcekppcngu'gpvt'rcu'ecucu'o cvtlegu0C" r ctvt'f g'gmq."VCUC'ug'i ctcpvk' »"rc'r tqxkuk»p'f g'elgtvcu'r ctvgu'eqo r nglcu0'K wcm gpvg."guvq'pq" gzenw'f'c's wg'F gpuq'ingxctc'c'ecdq'pgi qekqu'eqp'qvtcu'vgtto kpcrgu'c'pkxgn'kpvtpcekppcn"{'mecn0' Rqt'qvtq'rcf q."gnf gucttqmf'f g'guvc'ukvgo kuc'pq'ug'xkq'gur gekcm gpvg'r qvpekf q'r qt'uw'tgrcek»p" eqp"VCUC" {c's wg'r quggp" wpc"vc{ gevtk'c'i mdcn'gp" eqo Àp0'Gp"r ctvkwrt."ug'f gucec"rc" ko r qvpekf'f g'mu'et² f kqu'r Àdnequ'HQP F GCT"r ctc"co r rkt"uw'ecr cekf cf "f g'r tqf week»p" c"

⁴³⁸"Nqu'f kgevkqu'f g'F gpuq'eqo gpvc'p's wg'c'o gf kcf qu'f g'3; ; 2'F gpuq'gpvpc'wpc'r ctvg'f g'uw'f kxkuk»p'grgevt»plec' f g'Lcr »p" c'O cpcqu."Dtcukn"gp'f qpf g'ug'hcdtlecp"guvg' vkr q'f g'r kgl cu'grgevt»plecu0'Gp' guvc'f dtlec'vcdclcp" o c'qto gpvg'go r ncf qu'lc'cr qpgugu"{'ng'r tqxggp'gucv'r kgl cu'et'f'kecu'ugm'c'erkpvgu'lc'cr qpgugu'crgu'eqo q'Vq{qvc." J qpf c."I co cj c"{'J qpf c0'Rqt'qvtq'rcf q."rc'f kxkuk»p'vto kec'f g'F gpuq"wo dl»p'vkgp'wpc'r t'gugpeke'o w'uw'gtkqt" gp'Dtcukn'f qpf g'vkgp'ugku'f dtlecu"{'wp'egpvt'f g'f kug' q0'Ukp'go dcti q."rc'cnc'r t'gugpeke'kpf wvten'f g'F gpuq'gp" Dtcukn'pq'ug'f gdg'r tlpekr cm gpvg'c'Vq{qvc'ukpq'c'Ugmrpvku' r ctvkwrtto gpvg'c'Hkcv'uw'r tlpekr cn'erkepvg."{c's wg' guvc'htto c'vkgp'pkxgrgu'f g'r tqf week»p'b w'c'cnqu'gp'gn'r c'u'xgekpp0

o gf kcf qu'f g"re" f² ecf c" f gn'4232" cpvg"re" f hkwncf "r ctc"re" qdvpekep" f g" hkpceko kgpvq"r ctc" kpxgtukppgu"cn'kpwtkqt" f g"re" qti cpl cektep" kpwtpcekppcn" f g" hqto c"uko krc" c"m" s wg" uwegf k" eqp" VCUC" gp" guqu" c" qu0'

5.4.1.2 - Toyota Boshoku

" Vq{ qvc" Dquj qmw" Cti gpvkc" gu"re" hkrkn' mjecn' f g"re" eqo r c" o" f" c" o wnkpcckppcn' lcr qpguc" f gn' o kuo q" ppo dtg. "r ctvg" f gn' l twr q" Vq{ qvc. "f gf kcf c" c"re" hcdtkcekep" f g"re" u"r ctvgu" kpwtkqt gu" f g" rqu" xgj f" ewqu0³⁹ " Nngi » " c" re" Cti gpvkc" dclq" gn' ppo dtg" f g" O cuvt " Vtko " Cti gpvkc" gp" 4225. " kpuvni pf qug" gp" Eco r cpc. "r tqxlpeke" f g" Dwgpqu" Ckt gu. "r ctc" r tqf wek" rqu" cukgpvu. "kpwtkqt gu" { " grgo gpvu" hkn' cpvgu" f g"re" pwgxc" i gpgtcekep" f g" J knw0' Eqp" uw' mgi cf c" f gur re | » " cn' cpvtkqt" r tqxggf qt" f g" guvu" r tqf wevu" r ctc" VCUC. " re" hkrkn' mjecn' f g" re" eqo r c" o" f" c" o wnkpcckppcn' guvcf qwpkf gpug" Lqj puqp" Eqpvtqn0"

" Gn'ugv' f g" cukgpvu" f g" wp" xgj f" ewu" gu" wp" ukvgo c" eqo r rglq" { " gn' o " a u" equvuq" nngi q" f gn' o qvt0Rqt" glgo r m. "wp'ugv' f g' ewctq" cukgpvu" f g" wpc" J knw ". Ål gpgtcekep" vkgp' 822' r kgl cu' f qu" ckt dci u. " vqf q" gn' ukvgo c" gr' extkeq" r ctc" o qxgtm. " ukvgo c" f g" xgpvkrcekep" cf gpvtq" f gn' cukgpv. " hwpf cu" f g' ewgtq. " gpvtg" qvtcu0' Cf go " a u. " guvu" f gdgp" ewo r rkt" eqp" tgs wgtko kgpvu" f g" ugi wtkf cf " gur ge" hlequ" { " wpc" hcrn' f g" guvu" r wgf g' ugt" ngvni0Rqt" m' vcpvq. " gu" wp" r tqf wevq" eqo r rglq" { " egpvtcn' r ctc" gn' xgj f" ewu" " Rcdm" Tceekwk" gpvtgxkuc" r gtuqpcn" 5 18 14244-0'

" Ugi Åp" F cplgn' J gttgtq. " Vq{ qvc" Dquj qmw" xkpq" qtki kpcm gpvg" c" re" Cti gpvkc" eqp" re" kf gc" f g" gpucod rct" cukgpvu0' Cu" f" wcpvg" o " a u" f g" 32" c" qu" ko r qt » " f kwpvu" r tqf wevu" vgz vkgu" f guf g" Dtcukn' { " Rctci wc { " *O kukep" Rtqf wekxc. " 3: 19 14244-0' Rgtq. " gp" 4236. " VCUC" mgi » " c" wp" cewgtf q" eqp" gn' UO CVC" c" vtcx² u" f gn' ewcn' ug' pgi qel » " s wg" ug' mjecn' k' ct" f" cp" gucu" r ctvgu" gp" Cti gpvkc. " r gtq" uk' ug" mji tcdcp" eqpxgpku" ucmtkrgu" ceqtf gu" cn' ugevq" vgz vkn' { " pq" cn' cwqo qvkk. " { c" s wg" f g" mji eqpvtctkq" pq" r qf t" f" cp" eqo r gvt" eqp" gn' lequq" f g" rqu" r tqf wevu" ko r qtvcf qu" *T guqmwkep" O VG{ UU" 34; 5 14237-0' Gur ge" hleco gpvg. " ug" r rcpg » " guvc" mjecn' cektep" gp" gn' Rcts wg" kpf wutken' f g" Xknc" Hrcpftk. " gp" gn' r ctvkf q" f g" Nw^a p. " r tqxlpeke" f g" Dwgpqu" Ckt gu. " { c" s wg" cn' f" ug" j cd" f" cp" wlecf q" f kxgtucu" go r t gucu" vgz vkgu" { " j cd" f" c" o cpq" f g" qdte" gur gekn' cf c" s wg" r qf t" f" go r ngctug" *F cplgn' J gttgtq. " gpvtgxkuc" r gtuqpcn" 3 19 14244-0' F g" guvg" o qf q. " ug" tcf ke » " wpc" pwgxc" r rcpvc" f g" re" cwqr ctvkuc" lcr qpguc" gp" Nw^a p" go r ngcpf q" c" citgf gf qt" f g" 622" r gtuqpcu" { " mjecn' cpf q" gn' eqpvkpf q' s wg' gtc" r t gkco gpvg' ko r qtvcf q" *Gn' Etqpkuc. " 39 19 14236-0' Gu' f gek. " s wg' guvc" kplekvcxc" uwti k » " f guf g" re" i gtgpeke" f g" VCUC" r ctc" cwo gpvt" gn' lequq" vkgu" f g" rqu" xgj f" ewu" g" ko r rke » " gn' cewgtf q" eqp" re" cwqr ctvkuc" { " gn' ukpf kecvq" r ctc" r qf gt" mgxctm" c" ecdq0'

⁴³⁹ Vco dk' p' hcdtkcpl' f' p' gcu' f' g' cukgpvu' r ctc" cxkppgu" { " v' gpgu0'

" Gp"tgmelep"eqp"gn'f lug° q" f gn'r tqf wevq. "Rcdm" Tkeekwk"i gtgpvg"i gpgtcn'f g"Vq{ qvc" Dquj qmw'f guf g'gn'4226."uukvgpg"s wg"rc" go r tgucc"pkxgn'i mdcn'r ctvlekr c" f gn'f gucttqmj" f g"rc" J kwz"gp"Vekrpf kc."f lug° cpf q"iqu'culgpvqu'r tkpekr cm gpvg0C"r guct" f g"guvq."rc" hkrkn'iqecn'vkgpg" rc"r qukdrlf cf "f g"tgerk ct" kppqxcckppgu"gp" gn'r tqf wevq"r ctc" cf cr vctm" cn'eqpvz vq" f qpf g"ug" kpuvtc0Cu" f guf g'gn'4239"rc" go r tgucc"vkgpg"wp" f gr ctwco gpvq" f g"O cpci go gpv'f g"Rtq{ gevqu."gp" gn'ewcn'ug" f gucttqmj" r tq{ gevqu" f g"lpi gplgt" c0C n't gur gevq." gn'i gtgpvg"uukvgpg"s wg"rc" etgcelep" f g"guvq" f gr ctwco gpvq" hwg"r qukdrg" r qt" gn'xqno gp" f g"r tqf wevq" f g"VCUC" {."r qt"gpfg." f g" Vq{ qvc" Dquj qmw0"

Rqt" glgo r m." gn' f kgevqxq" eqo gpvc" s wg" mqu" xgj "fwmqu" Vq{ qvc" s wg" ug" hcdtkcep" gp" Cti gpvpc."ug"xgpf gp"gp"Co 2tlec"Nevpc."gp" qpcu" f g"cnacu"vgo r gtcwvctcu."r qt"m"ewcn"uwi k"gn' r tqdrgo c" f g" s wg" gn'ewgtq" f g"mqu" culgpvqu" vco dl2p"crcep|cdc" vgo r gtcwvctcu"o w{ "grgxcfcu0 Gpvpegu."gp" wp"r gs wg° q" f gr ctwco gpvq" f g" f gucttqmj" eqp" cn' wpu" lpi gplgtqu" f g" Vq{ qvc" Dquj qmw" Cti gpvpc"ug"cto »"wp"ukvgo c" f g"ckg"ceqpf kekqpcf q"r qt" f gpvtq" f gn'culgpvq."r ctc" s wg" ucn' c"r qt" wp"ewgtq"o letqr gthqtcf q." {."ewcpf q"rc"r gtuppc"ug"ukgpvc."gn'ukvgo c"ug"gpelgpc" cwqo a vleco gpvg0Cu" gn'i gtgpvg"r rcpvgc" s wg" "*nosotros no diseñamos el ventilador en sí mismo, lo compramos, pero todo el cableado, toda la posición, cómo se usa, el diseño de eso lo hicimos nosotros. Y eso después se replicó en otros lugares*". Gu'f gekl."c"r guct" f g"pq"r qugg" gn'f lug° q" f gn'ukvgo c" eqo r rvgq."rc" hkrkn'iqecn' f g" guvc"o wkpcekpccn'u" mrgxc" c"ecdq" cn' wpcu" cevxxkf cf gu" f g" lpi gplgt" c" r ctc" cf cr vct" gn'r tqf wevq" c" uw'eqpvz vq" mcecn'0F g" guvq"o qf q." guvc" r tqxggf qtc" lcr qpgucc" tgerk »"wp"r tqeguq" f g" *upgrading funcional* gn'ewcn'ko r rlec"r cuct" f g"rc" hcdtkcelep" f g"wp"r tqf wevq" cn'f lug° q" f gn'o kuq. "cwps wg" guvq"ug"j cmc" f cf q"r ctekrm gpvg0"

" Cf go a u."Vq{ qvc" Dquj qmw"j c" f gucttqmj" f q"rc" hwpf c" f g"rc" J kwz" I c| qq" Tceklpi 0Gp" guvq" ecuq."rc" cwqr ctvlekr"ug"xg" dgpghelc" f c"r qt" gn'j gej q" f g" s wg" gn'f lug° q" guvq"o qf gmj" f g"rc" J kwz"ug" tgerk c" gp" Cti gpvpc."r qt" m"ewcn"rg"r gto kg"o c{qt" r ctvlekr cel»p"gp"2 r0C" uw"xgl. "guq"rgu"j c" r gto klf q"gzr qtvt" guvcu" hwpf cu" c" Uwf a hlec. "{c" s wg" iqu'xqno gpgu"uqp" tgrvxxco gpvg" dclqu." {." r ctc" pq" vpgt" vqf q" gn'i cuvq" f g" f gucttqmj" gp" Uwf a hlec. "ug"m" gpv'f guf g" Cti gpvpc0"

" Gp" tguwo gp." Vq{ qvc" Dquj qmw." pq" xkpq" cn' r c"mu" eqp" VCUC." ukpq" s wg" m" j k q" r quvgtkto gpvg." f gur rc| cpf q" c" qvc" r tqxggf qtc" guvcf qwpkf gpug0C" uw"xgl. "rc" mcekn' cel»p" f g" wpc" r ctvq" f g" rcu" r kgl cu" { "eqo r qpgpvqu" s wg"ug" ko r qtvcpcp" ug" tgerk »"c" r ctvlekr" f g"rc" f g"rc" cf o kputcelep" f g" VCUC" r ctc" cwo gpvt" gn'eqpvz q" mcecn' f g" iqu'xgj "fwmqu" g'ko r rle»" gn'cewgtf q" eqp"rc" cwqr ctvlekr" { "gn'ukpf lecq" r ctc" r qf gt" mrgxctm" c" ecdq0Rqt "Anko q." uk'dlcp" guvc" hkrkn'pq" mrgxc" c" ecdq" r tqeguq" f g" kppqxccl»p" f g" r tqf wevq." u" m"j ceg" eqp" cevxxkf cf gu" f g" f lug° q" r ctc"rc" cf cr vcelep" f gn'r tqf wevq." tgerk cpf q" r tqeguq" r ctekrm" f g" *upgrading funcional*." m"ewcn'ug" xkq"

hcekkcf q'r qt 'gn'xqno gp'f g'r tqf week»p's wg'crecp| ctqp'gp'dcug'cnf g'VCUC "{ 'rc'wleceke»p'f gn' egpvtq'f g'f kug° q'f g'rc'J kwz'I c| qq'Tcekpi 'gp'Cti gpvkpc0' "

5.4.1.3 – Yazaki

Guc'hkto c'gu'rc'uwdukf kctk'f g'rc'bo wmkpcekqpcnllcr qpguc'[c| cnk'Eqr qtcvkqp.'r tqxggf qt' o wpf kni' f g' tgr wguqu" r ctc" xgj 'fwarqu" gphqecf q" gp" rc" r tqf week»p" f g" o c| qu" f g" ecdngu." kputwo gpvqu"{'eqo r qppgvu'eqo q'eqpgevtgu"{'vgt o kpcrgu0[c| cnk'gu'rc'r tqxggf qtc'i mdcnif g' ecdngu'f g'Vq{ qvc"{'ug'tcf kec'gp'vqf qu'mu'r c'fugu'f qpf g'rc'vgt o kpcnif gekf g'kpuvrcrtug0³: 'Cnki wcn' s wg"mu"ecuqu"cpvgtkqtgu."guc'hkto c'gu'wpc"ukvgo kuc"o wmkpcekqpcn'f g"qtki gp"lcr qp²u."ukp" go dcti q."c'f hgt gpek'c'F gpuq"{'Dquj qmw'guc'pq'r gtvgpeg'cnI twr q'Vq{ qvc0' "

[c| cnk'mgi »'c'Cti gpvkpc"gp"3; ; 8'r ctc'ceqo r c° ct'c'Vq{ qvc"g'kpuvc»'wpc'lf dtkec'gp'rc" r tqxkpek'f g'Dwgpqu'Clk'gu."ukp'f q'rc'r tko gtc'r rcpvc'f g"[c| cnk'O gtequw0'Gp'uwu'kpekqu."rc" hko c'hdtkcedc'vqf qu'mu'ecdngu'f g'rc'Vq{ qvc'J kwz0³: 'Gp'gn'4227'eqp'gnr tq{ gevq'KO X.'[c| cnk' eqo gp| »'c'r tqf wekt'rc'r ctvg'grgext»plec'f g'mu'r cpgru'f g'kputwo gpvqu'r ctc'mu'xgj 'fwarqu'f g' Vq{ qvc" Cti gpvkpc." cwps wg" guvq" gu" d^a uleco gpvg" wp" gpuc o drcf q" f g" f kpkvcu" r kgl cu" {" eqo r qppgvu'ko r qtwcf qu0' "

Cf go ^a u.'gp'4227.'[c| cnk'Cti gpvkpc'f gekf g'ngxct'wpc'r ctvg'f g'uw'r tqf week»p'f g'ecdngu" c'Wwi wc{.'cdtkgp'f q'wpc'r rcpvc'cn'0'Guc'f gekuk»p'guwxq'xkpewrcf c'c'f kpkvcu'fcevqtgu'ugi Ap" Etukncp'Equc.'i gtgpvg'f g'Xgpvcu"{'Rtq{ gevqu'f g'rc'eqo r c° 'f'f guf g'422; 0Gp'r tko gt'hw ct.'rc" r tqf week»p"etgek»r qt'gn'cwo gpvq'f g'Vq{ qvc"{'r qt'rc"lpeqtr qtceke»p'f g'I gpgtcn'O qvqtu"{' Ej t{ ungt'eqo q'enkgpvu.'m'ewcn'ngx»'c'rc'pgegukf cf 'f g'cwo gpvct'rc'ecr cekf cf 'f g'r tqf week»p⁴²" Rqt"qvtq'rcf q.'rc'hdtkceke»p'f g'ecdngu'kpg'rc'ectcevt'f'wkec'f g'ugt'o cpq'f g'qdtc'kpvcpukc.⁴⁴³" r qt'm'wcpvq."gn'r qtegpvc'g'f gn'equvq'ncdqtcn'gu'o ^a u'cng's wg"gp"rc"o c{ qt'f'f gn'tguvq'f g'rc'u" cwqr ctvkuc0' Cf go ^a u." gn' glgewkxq" o gpekqpc" s wg" gpvtg" 4225" {" 4227" gzku'f'c" wpc" cnc" eqphrkvkcf cf 'eqp'gn'UO CVC.'gp'h'pge'eqp'm' s wg'uwegf 'f'gp'gn't guvq'f g'rc'kpf wutkc'cwqo qvtk" gp'gug'r gt'f'f q0'Gucu'tc| qpgu'ngxctqp'c'rc'f gekuk»p'f g'cdtk'wpc'r rcpvc'gp'Wwi wc{.'f qpf g.'gp" "

43: 'Cf go ^a u.'[c| cnk'wkk' c'o ² vqf qu'ulo krtgu'cn'VRU.'r gtq'mco cf qu'New Yazaki System'*P [U0'
43: "Uwu'r tlpekrcrgu'eqo r gw'f qtgu'gp'gn'r c'f'u'upp'Ngct'*GGWW+.'s wg'cdcugeg" c'Hqtf."Miqo dgti "("Uej wdgvt' *Crgo cplc+. 's wg'rg'xgpf g'c'Xqmuy ci gp0'Gp'i gpgtcn'gug'vkr q'f g'r tqf wevqu'upp'cdcugekf qu'r qt'r tqxggf qtgu' i mdcngu's wg'ceqo r c° cp'c'rc'u'vgt o kpcrgu'f guf g'uw'r c'f'u'f g'qtki gp."{'c's wg'eqo r ctvgp'rc'pcekqpcn'cf . 'j cuv'mu' r c'fugu'f qpf g'hwgi q'ug'tcf kecp0'
442"Rctc"[c| cnk'rc'u'xgpvcu'c'qvtqu'enkgpvu'r qt'hwgtc'f g'Vq{ qvc"uq"pgi qekqu'r wpcwrgu."r qt'cni wpcu'r tqf wevqu' gur ge'f'hequ."{'r qt'r gt'f'f qu'f g'vgo r q'tgrvko gpvg'eqtqu0'"
443"Rqt'glgo r m.'cn'4242'[c| cnk'Cti gpvkpc"go r rgedc'30522'vcdclcf qtgu.'wp'pAo gtq'eqpukf gtdcrgo gpvg'o ^a u'cng' s wg'gn't guvq'f g'rc'u'cwqr ctvkuc0'Cf go ^a u'f g'guq."ug'f gdg'vpgt'gp'ewgpvc's wg'guc'hko c'r qugg'f qu'r rcpvcu'gp' Wwi wc{" 'wpc'gp'Rctci wc{"s wg'cdcugegp" c'Vq{ qvc" Cti gpvkpc0'Gp'vqcn'vqf cu'guc'u'r rcpvcu' uwo cp'5022' vcdclcf qtgu'*Etukncp'Equc.'gpvtgxkuc'r gtuqpcn'46B4245'0'

gug'o qo gpvq."gn'equvq'f'g'nc'o cpq'f'g'qdtc'g'tc'o gpqt'cn'cti gpvq. ⁴⁴⁴j cd'c'dclc'ukpf'kecnk'cek'p' { 'ngu'qht'gekgtqp'f'kukpvqu'dgpg'hekqu'huecrgu'g'ko r qukxqu'*Et'kukcp'Equc."gpv'gxkuc'r'gtuqpcn' 46B4245-0'

Nwgi q."gp"gn'4232"eqo gpl ctqp'c'r tqf wekt'r ctc'nc"Xqmuy ci gp"Co ctqm"nc"Ektqmp" Dgtrkpi q."nc"Rgwi gqv'Rctvpgt."gn'Rgwi gqv'528"{"gn'Tgpcwm'Hmgpeg0'C"r ctvt'f'g'gmq."[c| cnk' Cti gpvpc'f'gek'f'g'cdt'k'wpc'ugi wpc'f'r'ncpw'gp'Wwi wc{0Nwgi q."gp"gn'4235.'c'tc'f'f'g'nc'k'p'k'ek'v'k'c' f'g'[c| cnk'Dtcukn'ug'cdt'g'q'v'c'f'f' dtlec'gp'Rctci wc{.'ko r wnc'f'c'vo d'k'p'r'qt'gn'o gpqt'equvq'f'g'nc' o cpq'f'g'qdtc'0⁴⁵"Gp"4237."eqp'gn'eco dlq'f'g'o qf'gm'f'g'nc"J kwz."[c| cnk'Cti gpvpc'i cp»'nc' r ctv'f'gn'ecdrgcf'q'f'gn'r'cp'gn'f'g'k'p'v'wo gpvq.'s'wg'j'cuv'gug'o qo gpvq'ug'ko r qt'vdc'f'guf'g'q'v'c' go r t'guc'tcf'kecf'c"gp"Dtcukn'Ukp"go deti q."nc'r tqf week'p'f'g'guqu'ecdrgu'hmg'v'c'um'f'c'f'c'nc' h'f' dtlec'f'g'Rctci wc{"ug'eqo gpl »'c'r tqf wekt'g'ko r qt'v'f'guf'g'cn'f'0'

Gp"r ctv'ewrt." gn' glgewkxq" eqo gpvc' s'wg' nc' r'ncpw' f'g' Cti gpvpc' v'kpg" o wej cu' f'k'hwnc'f'gu'Gri'cwo gpvq"eqp'v'c'p'v'g'f'gn'xq'nc'w'gp'f'g'h'cdt'kecek'p'f'g'Vq{qvc'mqu'qdrki »'c'k" k'petgo gpv'c'p'q'uw'r tqf week'p.'c'wps'wg'p'q'ug't'gcrk' ctqp'nc'uk'p'x'gt'uk'p'p'gu'cf'gew'f'cu'r'ctc'c'wo gpv'c' nc'ecr'cek'f'cf'k'p'v'c'nc'f'c'0'C'f'go ^au."cn'ugt'o cpq'f'g'qdtc'k'p'v'g'p'uk'c."ew'c'p'f'q'nc'h'cdt'kecek'p'et'geg'ug' f'gdgp"eqp'v'c'v'c't'p'w'g'x'qu'v'c'd'cl'c'f'qt'gu{"nc'ecr'cek'cek'p'f'g'guv'qu'gu'nc'ti'c'{"equv'qu'0'C'uw'x'gl'."gn' f'k'g'v'k'x'q'v'qu'v'k'p'g's'wg'nc'h'k'o'c'gp'Cti gpvpc'r'k'g'f'g'f'k'p'g'q'f'guf'g'4236."{'s'wg.'uk'p'q'h'w'g't'c'r'q't's'wg' Vq{qvc'ng'r'k'f'g'c"[c| cnk'guv'c't'gp'gn'r'c'f'u."f'guf'g'nc"ecuc"egp'v'c'nc'f'g'nc'r'q'x'g'g'f'q'tc'{"c'j'cdt'f'cp" f'gek'f'k'q't'g'v'k'ct'ug'0'

Cn'ki'wcn's'wg'nc'u'h'k'o'cu'cp'v'g't'k'q't'gu."[c| cnk'v'kpg'w'p'egp'v'q'f'g'K'F'gp'V'ck'p'f'k'c."f'q'p'f'g' ug't'gcrk'cp'mqu'f'kug'o'qu'g'k'pi'g'p'k'g't'f'c'f'g'nc'u'r'ct'v'g'u'r'ctc'nc"J kwz'0D^a uleco gpv'g.'mqu'r tqf wev'qu'f'g' [c| cnk'k'p'eq't'r'q't'cf'qu'c'guv'qu'x'g'f'ew'mqu'u'qp'f'kug'o'cf'qu'{"f'guctt'q'm'c'f'qu'gp'V'ck'p'f'k'c."{"n'wgi'q' t'gr'q'f'wek'qu'gp'Cti gpvpc'{"Uw'^ah'k'ec'0'Gp'q'ecuk'p'p'gu."ug'r'w'g'f'g'j'ceg't'cni'Ap'eco dlq'r'gs'wg'o'q' gur'g'e'f'heq'f'cf'cu'nc'u'p'q'to'c'v'k'cu'{"gur'gek'h'ek'f'cf'gu'f'g'ec'f'c'o'g'tec'f'q'0'

Rqt'q'v'q'nc'f'q.'f'guf'g'gn'4237'[c| cnk'O'g'tequw't'cf'k'ek'»'f'qu'f'gr'ct'v'co'gpv'qu'f'g'K'F'gp'U'cp' Rcdm'{"E'w'k'k'k'dc."f'q'p'f'g'ug'm'g'x'c'p'c"ecdq'r'tq{g'v'qu'p'w'g'x'qu'0'Ukp"go deti q."guv'g'v'k'q'f'g' f'guctt'q'm'qu'gz'ew'f'g'c'Vq{qvc.'f'q'p'f'g'guv'cu'ce'v'k'k'f'cf'gu'ug'f'gur'nc'gi'cp'gp'nc'u'egp'v'q'nc'i'nc'd'c'rgu'f'gn' f'kug'o'q'f'g'nc'u'x'g'f'ew'mqu'0'Gp'r'ct'v'ewrt.'nc'u'egp'v'q'nc'f'kecf'qu'gp'Dtcukn'ug'f'gf'kecp'cn'f'guctt'q'm'qu'

⁴⁴⁴"Ugi'Ap'gn'gl'gewkxq."gp'gug'o qo gpvq'nc'o cpq'f'g'qdtc'f'g'Wwi wc{"equv'c'nc'o'k'cf's'wg'nc'cti'gpvpc'."c'wps'wg' f'gur'w'nc'w'nc'hw'g'c'wo'gpv'c'p'f'q'cn't'ko'q'f'g'nc'k'p'nc'w'wi'wc{c'uk'p'nc'x'c't'c'ecdq'f'g'x'c'nc'ek'p'p'gu'f'g'uw'o'q'p'g'f'c'." eqo'q'eqp'v'c'c'c't'f'g'nc'w'g'nc'w'eg'f'k'»'gp'Cti'gpvpc'."r'q't'nc'v'p'v'q."cn'4243."gn'equv'q'nc'd'q't'c'nc'g'tc'r't^aev'eco'gpv'g'ki'wcn' gpv'g'co'dqu'r'c'f'ug'0'

⁴⁴⁵"Gug'o'q'x'ko'k'p'v'q'k'p'x'q'nc't'»'c'x'c't'k'cu'go'r't'g'uc'f'g'nc'd'k'lecek'p'f'g'ecdrgcf'q.'v'c'rgu'eqo'q'U'wo'k'f'g'p'v'q.'H'w'k'w'c'{"N'g'q'p'k'o'q'v'k'c'f'cu'r'q't'gn'o'gpqt'equv'q'nc'd'q't'c'nc'f'g'Rctci'wc{"*Et'k'uk'cp'E'qu'c."gpv'g'x'k'uc'r'gtu'q'pcn'46B4245-0'

f g'r tq { gevu'r ctc "qvtqu'endgpgu0Gpvtg"2 uqu. "mqu'r tpekr crgu"uqp "T gpcwm/P kuucp" { "O gtegf gu" Dgp| "Etkukcp"Equc. "gptgxkuc'r gtuqpcn"46 B 4245-0"

Gp"tguwo gp. "guc"gu"qvtc"ukugo kuc"o wnkpcckqpcn'lcr ppguc"s wg"uki wg"c"Vq { qvc"gp"uw" r tqeguq"fg"kpvtgpcckqpcrk cckp. "cwps wg"c"fhgt gpek"fg"rcu"cpvtgkqtgu"guw"pq"gu"fgnI twr q" Vq { qvc0F g'hqto c'uko krc"sgw"rcu"htc cu"cpvtgkqtgu. "rcu"cevxkf cf gu"fg"K F "sgw"tgerk cp"gp"gn" r c"u"uqp"guccucu" { "gn"i twguq"fg"gu"fgucttqm"ug"ngxc"c"ecdq"gp"Vckrpf kc"eqp"gn'egpvtq"fg" kpxgukc cckp"fg"rc"Vq { qvc"J kwz0Rqt"qvtq"rcf q. "guc"cwqr ctvkuc"gu"rc"Àp"lec"sgw"pq"ug"xkq" gur gekm gpvg"dgpghekefc'r qt"gn'x"pewu"eqp"Vq { qvc"cti gpvkpc" { . "o" a u'dkcp. "ug"xg'r gtlwf kefc" r qt" guvt" gp" gn"r c"u. "ugi Àp" mqu" glgewkxqu0" Ncu" ectcevtg"luc"cu" r ctvkewrtgu" fg" uw" r tqeguq" o cpwkewtgtq'j cegp"sgw"ugc"b cpq'fg'qdtc"kpvgukxc. { "guq'lwi » "wp"r cr gn'egpvtc'n'gp"lwf gekukp" fg"fg"gunqecrk ct"r tqf weekp"gp"mqu"rc"u"gu"xgekpu"fg"gn"O gtequwt0Gp"r ctvkewrt. "mqu"cw gpvqu" i tcf wrgu"gp"rc"r tqf weekp"fg"VCUC"pq"uqp"eqpxgkpgvgr"ctc"guw"htc c. "cn'eqpvtctk"sgw" vqf qu"mqu"qvtqu'r tqxggf qtgu"gpvtgxkucf qu. "eqo q"ug"ka "xkpf q"gp"mqu"uki wkpvgu"cr ctvcf qu0Guq" ug"eqplwi » "co dk p"eqp"wp"dc"lc"kpvgtukp"fg"rc"eqo r c° "c" f wtcpvg"gn'r gt"qf q"dc"lq"guwf kq0"

5.4.2 - Proveedores multinacionales no japoneses

5.4.2.1 - Dana

F cpc"cti gpvkpc"gu"rc"htc'n'mecn'fg"rc"eqo r c° "c"o wnkpcckqpcn'guwcf qwplf gpug"Fcpc" kpeqr qtcvgf. "fgf kefc" c"rc" r tqf weekp" fg" glgu. "glgu" o qvtlegu. "vcpuo kukppgu" { "gs wkr qu" grgevtf kp° o lequ. "vto lequ. "fg"ugmcf q" { "fki kcrgr"r ctc"xgj "pewu0Guc"go r tguw"gu" r tguvgp" gp"cti gpvkpc"fguf g"3; 82"dc"lq"gn'pqo dtg'fg"Ur keg"t"Glgu"Rgucf qu0Rqugg"fg"l'f dtkecu"wp"fg" gmcu"gp"p cuej gn'r tqxkpek"fg"Ucp"Nwku. "rc"ewcn'f guf g"gn'4222"gu" fgf kefc" c"rc"hc"dtkecckp"fg" eqo r qpgpvu"fg"uwur gpukp" { "fktgeekp".⁴⁴⁶ { "qvtc"gp"t tcpf "Dqwti. "r tqxkpek"fg"Dwgpqu"ctk"gu. " f qpf g"ug"r tqf wegp"glgu"fhgt gpekrgu" { "uwu"t gur gevku"eqo r qpgpvu0Gp"4243. "gptg"co dcu" r rpxcu. "Fcpc"go r rgedc"ctf gf gf qt"fg"622"r gtuqpcu0

Nc"r rpxc"dqpcgtgpug'r cu» c"guvt"dc"lq'r qugukp"fg"Fcpc"gp"3; ; : "c"r ctvk"fg"rc"eqo r tc" c"rc"htc c"Gcvp. { "gu"rc"Àp"lec"hc"dtkecpvg"fg"glgu" { "ectf cpgu"gp"cti gpvkpc0⁴⁴⁷"F guf g"uwu"lpekqu" j cuw"4237. "guc"l'f dtkec"r tqf we"p"glgu" { "ectf cpgu"r ctc"xgj "pewu"r gucf qu0Ugi Àp"lqu² "Cndgtvq" O cif qpcf q. "Eqwvt { "O cpci gt"fg"Fcpc"fguf g"4236. "gug"pgi qek"ug"cdcpf qp»"r qts wg"gtc" "muy variable la demanda de estos clientes y eran elementos que requerían gran cantidad de partes

⁴⁴⁶ "Gur ge"heco gpvg"gp" guc"l'f dtkec"ug"r tqf wegp"t»wrcu. "gzvto qu"fg"fg"ktgeekp" { "r cttkrcu"r ctc"vqf q"vkr q"fg" xgj "pewu0Cn'l'ug'hc"dtkecp"ctf gf gf qt"fg"82022"r tqf wequ"b gpucrgu"g"bo r qtvcp"52022"o gpucrgu"fg"qvtcu'r rpxcu" r ctc"j cegrgu"wp"r gtuqpcrk cckp"fg"cvu"fg"4244+⁴⁴⁷"lqu² "O cif qpcf q. "gptgxkuc'r gtuqpcn"3; B3 4244-0"

⁴⁴⁷ "Gn'ectf"p"gu"wp"ukugo c"o ge"pleq"sgw"r gto kg"wpk"fg"qu"glgu"pq"eqczkrgu0Uw"qdlgkxq"gu"vcpuo kkt"gn" o qxko kpvq"fg"tqvckp"fguf g"wp"glg'eqpf wevt"cqvtq"eqpf wekf q0"

importadas y acá implicaba importar para tenerlo 6-8 meses sin uso porque la demanda local no lo requería. Era un negocio no muy rentable” *Lqu² "O cif qpcf q." gpvtxkxw" r gtuqpcn" 3; B34244+0F guf g"gu"gpvqpegu"r"l" dtlec" f gekf k» "cdqectug"eqo r rgvco gpvg" c"cdcugegt" r ctvgu" r ctc" r leni"wr u0'

Nc" f geku» p" f g" r" go r t guc" gucf qwpkf gpug" f g" f gukpc" gn'vqcn' f g" r" r tqf week» p" f g" r" r tqxkpek" f g" Dwgpqu" Ckt gu" c" r leni"wr u" guwxq" cuqekf c" c" s wg" f guf g" 4236" F cpc" hwg" gngi kf c" r qt" VCUC" r ctc" hcdtlect" gn'ecdgl cni" f hgt gpekni" { "ru" ectf cpgu" f gn'pwxq" o qf gm" f g" J knw0C" plxgni" r qecn" VCUC" gu" gn' r tkpek" cni" r kpv" f g" F cpc. "ukp" go dcti q. "c" plxgni" r qden" Vq{ qvc" tgr t gupvc" wpc" r ctv" o kqtkctk" f g" ru" erkep" vgu" f g" r" c" wqr ctvkw. " { c" s wg" uwu" o c{ qtgu" erkep" vgu" uqp" ru" vgo kpcrgu" gucf qwpkf gpugu" Hqtf. "I" gpgtcn" O qvqu" { "Ej t { urgt0'

Gp" r ctvkwrt. " f guf g" r" go r t guc" uqukpgp" s wg" r" r tqf week» p" f g" gucu" r kgl cu" pgeguke" wpc" kpxgtu» p" vpc" cnc" s wg. "ukp" xqno gp" { "gucnc. "pq" gu" tgpvcdng" gn' pgi qekq0" Vq{ qvc" Cti gpvpc" rgu" dtkpf c" guq. "wp" i tcp" xqno gp" f g" eqo r tcu0C" uw'xgl. "ru" f kt gev" xqu" uqukpgp" s wg" gn' hkf gtc| i q" f g" F cpc" gp" gn' o gtecf q" rgu" r gto kg" kpxgt" v" gp" vgepqmi "c" { "cwo gpvt" r" r tqf wev" kxf cf 0' Gp" r ctvkwrt. "ru" r tkpek" crgu" kpxgtu" kpgu" f g" ru" Ànko qu" c° qu" hwtgp" r ctc" cwqo cvk ct" r tqeguqu" r tqf wev" xqu" 0C" uw'xgl. "O cif qpcf q" vco dk² p" r rcpvc" ru" f hkwncf gu" gp" gn' i ktq" f g" wkrkf cf gu" { " f kxf gpf qu" f guf g" 4233/34" r ctc" hgxct" c" ecdq" kpxgtu" kpgu. " { c" s wg" r" ecuc" b cvk k' p' q" gu" f kur wguv" c" pq" qdvpgt" t gvt pqu0" Rqt" glgo r m. " gn' f kt gev" xqu" uqukpgp" s wg" "en el predio tenemos una máquina para fundir acero y la tuvimos que cerrar en el 2013-14 por ese tipo de problemas. Es la única fundición de ese tamaño y envergadura en el país que abastecía a las terminales. Los bloqueos hicieron que dejara de ser rentable el negocio. Toyota buscó la forma de que la reabriéramos, pero no se pudo, no era rentable” *Crdgtv" O cif qpcf q." gpvtxkxw" r gtuqpcn" 3; B34244+0'

C" uw'xgl. " j cuc" 4232. " F cpc" wxq" vco dk² p" wpc" r rcpvc" gp" Rcej geq" r tqxkpek" f g" Dwgpqu" Ckt gu. " f guf g" r" ewcn" r" r tqxg" c" "ej cuku" c" Vq{ qvc" gp" dcug" c" wp" cewgtf q" kpvtpcekqpcn" *F cpc. " 34B4227+0C" r ctv" f g" f lej q" c° q. "guc" l" dtlec" gu" eqo r tcf c" r qt" r" o wnkpekqpcn" o gzkepc" O gvcnc. "c" tc" f g" wpc" eqo r tc" kpvtpcekqpcn" f g" r" f kxk» p" f g" r tqf wev" qu" gut wewt crgu. " F cpc" J qrf kpi " Eqtr qtcv" kq. " { " r" hcdtkecel» p" f g" ej cuku" r ctc" r" J knw" s wgf » " c" ecti q" f g" guv" eqo r c° "c" *O gtecf q. "39B4422; +0'

Rqt" qvtq" rcf q. " F cpc" Cti gpvpc" r qugg" wp" f gr ctvco gpv" f g" kpi gplgt" c. " r gtq" gu" kpi gplgt" c" f g" cr rkecel» p. " gn' f kug° q" ug" j ceg" dª ukeco gpvg" gp" GGWW0" F g" guv" o qf q. " f gr gpf gp" gp" i tcp" o gfkf c" f g" r" ecuc" b cvk k' r ctc" gucu" hwpkqpgu0'

Cf goª u" f g" Vq{ qvc. " F cpc" r" r tqxgg" ectf cpgu" c" Hqtf " r ctc" r" Tcpi gt" f guf g" 42340C" uw' xgl. " j cuc" 4239" r" go r t guc" r tqf we" c" gucu" r kgl cu" r ctc" r" Xqmny ci gp" Co ctqm" ukp" go dcti q. "

gmq'ug'f kueqpvkw» "{c's wg'rc'go r t guc'crgo cpc'f gekf k»'lo r qt vctnq'f guf g'Vvts w'f' r qt'wp'vgo c' f g'eququ*⁴⁴⁸ Iqu² 'O crf qpcf q. 'gpvtgxkuc'r gtuqpcn'3; B3 4244-0⁴⁸ Vco dk p'hdtklep'gucur' kgl cu' r ctc'hqu'o qf gmq'P kuucp'Htqpvgt. 'T gpcwn'Crcunep' '{ 'O gtegf gu'Dgpl 'Ur tkpvtg⁴⁹"

Gp'tguwo gp."guc"go r t guc'ug'gpewgvtc"gp"gn'r c'f'f guf g'cpvgu'f g'rc'mgi cf c'f g'VCUC." ukp"go dci q. 'rc'cuqekcep"eqp"rc'vgo kpcn'ler qpguc'hwg'f gygo kpcpvg'r ctc'rc'cwqr ct kuc'0'Gp' r ct vkwrt. 'rcu'o c {qtgu}»tf gpgu'f g'eqo r tc'f g'VCUC" c'r ct vkt'f gn'4237'i gpgtctqp's wg'F cpc'ug' gur gekrleg'gp'r len'wr u. 'r tqxg{² pf qrg'cni'guv'f g'rcu'r len'wr u'f' 'wkrkctkqu'kxkcpqu'gp'Cti gpvkc" *eqp'gzegr ek»p'f g'Xqmuy ci gp+."{ "cdcpf qpcf q'iqu'enkgpvgu'r tqf wevqt gu'f g'xgi 'f'wqu'r gucf qu'0' Cf go ^a u."gn'xqno gp" f g'r tqf week»p"cræp| cf q'r qukdkk»"s wg"rc"eqo r c'°'f' r wf kgtc"tgerk' ct' kpxgtukppgu" r ctc" rc" cwqo cvk'cek»p" f g" vctgcu." m' ewcn' i gpgt»" *upgrading de procesos*, cwo gpvcpf q'uwu'pkxgru'f g'r tqf wevkkf cf 0'Gp'ewcpvq" c'rcu'cevkkf cf gu'f g'kppqxcel»p. 'rc'hkcn' tgerk' c'w»m'cni wpcu'tgmekppcf cu'c'rc'kpi gpkgt'f'f g'cr n'cekel»p0"

5.4.2.2 - Metalsa

O gvcnc'gu'rc'hkcn'hcen'f g'rc'cwqr ct kuc'o wnkpcckppcn'bz kcep'f gn'bz kuo q'pgo dtg.⁴⁴ " wpc'f g'rcu'o ^a u'i tcpf gu'f g'Co ² tlec'Ncvkc0⁴⁴: 'O gvcnc'mgi »"c'Cti gpvkc"gp'4232" c'r ct vkt'f g'rc" eqo r tc" c"pkxgn' i mdcn' f g'rc" f kxkuk»p" f g" r tqf wevqu" gutwewtcrqu" f g" F cpc." F cpc" J qif kpi " Eqtr qtcvkvpp0C'tc'f' f g'gmq."rc'go r t guc'o gzkcp'ug's wgf »"eqp"rc'r rcpw'f g'Rcej geq." r tqxkpek" f g'Dwgpqu'Cktgu."c'ecti q'f g'rc'hkcn'cekel»p" f g'ej cuku'r ctc'rc"J kwx0'Gp'4243'O gvcnc'hkcn'cd'c' rc"o kcf'f g'mqu'ej cuku'f g'Vq{ qvc."{ "rc'qtc'o kcf'rcu'j ce'f'kpvgtpcp gpvg'VCUC0"

Ugi Àp'Gf wctf q'T gkmf. "xlegr tgu'f gpvg'eqo gtekn'f g'O gvcnc"Uwf co ² tlec'f guf g'4236." rcu'r rcpw'f g'Cti gpvkc" { "Dtcukr's wg'O gvcnc"qdwq" c'r ct vkt'f gn'cewgtf q'kpvtpckppcn'pwpec" hwgtqp'f g'i tcp'kpvgt² u'r ctc'rc'ecuc'o cvk'k' o gzkcp." { c's wg'uw'xqno gp'f g'r tqf week»p'gu'dclq" { "uw'hqeq" guwdc"gp'qdvpgt'rcu'qr gtckepgu'f g'F cpc"gp"GGWW."f qpf g'ug'gpewgvtc"uw'*core business* *Gf wctf q'T gkmf. "gpvtgxkuc'r gtuqpcn'47 19 4243-0Ugi Àp'gn'f kgevkxq.'O gvcnc" *{ "qvcu"

⁴⁴⁸ Guc'vgo kpcn'lg'qhtgek»'c'F cpc'r tqf wek'rcu'ectf cpgu'r ctc'rcu'Co ct qmif gn'bz gtecf q'hcen'f' c's wg'gp'guvqu'ecuqu' ug'rcu'gpectge'f'rc'lo r qtvcel»p'f gdlf q'c'rcu'ctepcgngu."o kpvtcu's wg'rcu'xgi 'f'wqu'r ctc'rc'gzc'rtvcel»p'pq'r ci cp' ctcpcgngu'f gdlf q'cni'TCHORgtq'gn'xqno gp'f g'r tqf week»p'f g'rc'eco kppgv'r ctc'gn'bz gtecf q'hcen'gtc'dclq" { "F cpc" pq'cegr w»'rc'r tqr wguv0'

⁴⁴⁹ C'uw'xgl . 'gn'f kgevkxq'eqo gpv'c' h'p'gu'f g'4244'ug'gpeqptcdcp'gp'p'gi qekcep'eqp'Ugmpvku'r ctc'r tqf wekrig' r kgl cu'r ctc'rc'r len'wr 'Rgwi gqv'Ncpf vtgm'gpuc' drcf c'gp'Ww'w'c'." { 'r ctc'gn'guwf kq'f gn'kpekq'f g'rc'r tqf week»p'f g' rc"TCO "gp'Cti gpvkc0'

⁴⁴: "O gvcnc"gu'r ctvg'f gn'eqpi mjo gtecf q"go r t guctkn'r gtvgpgekpv"cn'I twr q"Rtqgl c."f g'ecr kcrqu'o gzkcpqu" { " f gf lecf q'o c {qto gpvg'cni'vdtq'f g'rc'eqpvtweek»p0'

⁴⁴: "Qvcu'f g'gm'u'up-²P go cm'xco dk p'f g'ecr kcrqu'o gzkcpqu."f gf lecf c" c"rc'hkcn'cekel»p'f g'r kgl cu'f' "ukngo cu' cwqo qvtegu'f g'cno kpkq." g" Kfej r g'o czkqp."o wnkpcckppcn' dtcukrg° c." hkcn'cekel»p'f g' twgf cu' { "eqo r qpgpvgu' gutwewtcrqu0"

cwqr ct wncu'bo wmpcekqpcrgu'guv³ p'r t guggvgu'gp'Uwf co² tlec'r qts wg'ug'iq'r kf gp'rcu'vgo kpcrgu' { 'pq'r qt'wpc'f gekul»p'r tqr kc⁵²'''

Rqt'qvtq'rcf q. "gn'glgewkxq"ug^o crc's wg'gzkug'wpc"eqo r ngo gpvctkgf cf "f g'rcu'hkrcrgu'f g" O gvcnc'f g'Cti gpvpc" { "Dtcukn" { c's wg'rc'r tko gtc'xgpf g'ej cuku'r ctc'r lenl'wr u'*Vq { qvc. "Hqtf" { " Xqmuy ci gp+' { "rc'ugi wpc'c. 'r ctc'xgi 'pewru'r gucf qu'Guvq'i gpgtc's wg'O gvcnc'Cti gpvpc'vapi c" wpc"eqo r gvpekc"dcucpvgrko kcf c"gp'rc'tgi k»p⁵³'''

Gp'tgrck»p"eqp"gn'x'pewru"eqp"VCUC. "gn'f kt gevkkq"uqukpgg's wg."c'f khtgpekc'f g'qvtcu' vgo kpcrgu's wg'cf o kpkutcp'c'uwu'r tqxggf qtgu'c'tcx² u'f gn'eqphkewq. "Vq { qvc'iq'j ceg'c'r ct w'f gn' eqpugpuq. 'ukp"go dcti q. "'el consenso no quiere decir que se encuentra fácil y rápido. Te van a apretar hasta exprimir la última gota de agua que tengas para lograr la competitividad. Lo que tienen es que tienen un procedimiento, un formato, un proceso, dentro de esas cuestiones que es más profesional"'''*Gf wctf q" Tgkmf . "gpvtgxkuc'r gt uqpcn'47 19 14243+0Cf go^a u. "gn'glgewkxq" uqukpgg's wg'wp'cur gevq'egpvtcn' { 'r qukkxq's wg'vkgpg'uw'x'pewru"eqp"VCUC' uqp'iqu'eqo r tqo kuqu' f g'o cpvpgt'g'kpetgo gpvct'iqu'xqnÀo gpgu'f g'eqo r tc'c^o q'c^o q. " { c's wg'iq's wg'o^a u'chgevc'uw' pgi qekq' uqp'rcu'quekrcqpgu'f g'xqnÀo gpgu'0"

Gu'f gekl.'s wg'guvc'eqo r c^o 'c' hgi »'cn'r c'ju'c'r ct w'f g'wp'cewgtf q'kpvtgpcqpcn'ukp'guvct' egpvtcm gpv'f gf kecf q'c'guv'bo gtecf q'Ukp'go dcti q. "gn'x'pewru"eqp"VCUC'ig'r gto k»'uquvpgt' xqnÀo gpgu'f g'eqo r tc'guvdrgu'g'kpetgo gpvrcgu' { "cu'f'co dk² p'r tqxggf'f g'ej cuku'cn't guv'f g'rcu' r tqf wvqtcul'f g'r lenl'wr u'gp'Cti gpvpc'0Guvq. 'lwo cf q'c'lw'eqo r ngo gpvctkgf cf 'eqp'hc'r tqf week»p" f g'Dtcukn'dgpghek»'c'rc'cwqr ct wncu'f wcpvg'gn'r gt'qf q'dclq'guwf kq'0Rqt'qvtq'rcf q. "cn'ki wcn's wg' gn't guv'f g'iqu'r tqxggf qtgu'o wmpcekqpcrgu. 'rcu'cevkkf cf gu'f g'K F 'mgxcf cu'c'ecdq'gp'gn'r c'ju' uqp'o 'pko cu. 'f gf kecpf q'gucu'vctgcu'c'iqu'egpvtqu'kpf wutkrngu'o^a u'ko r qt'vcpvgu'xkpewrcf qu'c'uwu' ecucu'bo cvlegu'0'

5.4.3 - Proveedores locales

5.4.3.1 - Industrias Guidi

Kpf wutku'I wkf k'»K + "gu'wpc"go r t guc'hc'o krct'f g'ecr kcrngu'cti gpvpcqu'hwpcf cf c"gp'3; 82" s wg'ug'f gf kec'cn' guco r cf q'f g'r ct vgu'f g'ecttqegt'c" gp'cegtq' { "cn'gpuc'o drcf q'f g'eqplwpvqu'

⁴⁵²" Ugi Àp" gn' glgewkxq. "gp" cni wpu" ecucu" gzvgo qu. "cni wpcu" cwqr ct wncu" i rdrcrgu" r wgf gp" kpenwq" pgi qekt" eqpvtcvqu'eqp'rcu'vgo kpcrgu'eqp'r tgelqu'r qt'f gdclq'f gn'pkgn'f g'uwvpgvcdk'cf "geqp»o kec'eqp'cn'f g'ceqo r c^o ct" c'guvqu'entpvgu'0C'uw'xgl. "uki wkgpf q'cn'f kt gevkkq. "cni wpcu'f g'guvcu'vgo kpcrgu'co r qeq' uqp'tgpvdrgu'gp'rc'tgi k»p" f gdlf q'c'uwu'dclqu'pkxrgu'f g'r tqf week»p. "ukp"go dcti q. "r qt'vgo qt'c's wg'rc'eqo r gvpekc'rgu'i cpg'uw'r qtel»p'f gn' o gtecf q' { . 'cu'f' i cpgp'guccr. 'r gto cpgegp'gp'Co² tlec'f gn'Uwt'0'

⁴⁵³" Cf go^a u. "Tgkmf" f guvcc' s wg'gn'pq' r qugg'wp'lg'g'eqp'wpc'f kt geek»p'tgi kqpcn'gp'Dtcukn'eqo q'uf'vkgpg'qvtcu' cwqr ct wncu' { "vgo kpcrgu. " { 'r wgf g'i gpgtc' s wg'iqu'kpvtgugu'f g'rc'hkrcn'cti gpvpc's wgf gp'gp'ugi wpc'q' r rcpq'gp' tgrck»p"eqp'rcu'r rcpvcu'ectkqecu'0'

uqf cf qu'r etc'rc'lpf wutlc'cwqo qvtk OGp'uwu'lpkqqu.'r tqf we'c'vcps wgu'f g'eqo dwukdr'f g'cegtq
{ "mgi »"c"vpgt'ecuk'gn"; 2' "f gn'o gtecf q"meci"*Ectm"Rcp."gpvtgxkuc"r gtuqpcn"3744244+0'
Ewcpf q"mqu'vcps wgu'f g'eqo dwukdr'eqo gpl ctqp"cj cegtug"eqp"r n' ukeq."rc"go r tgu" f gl»"f g"
hdtlect" Gug'r tqf wevq" { "ug'hwg'tgeqpxk'vkgpf q"j cekc"rcu'cev'xkf cf gu'cewrcgu0'

Nc'hko c"vkgp" f qu'r rcpwu."gp"rcu'mqecrk cf gu'f g"Dwt| ceq" { "\ a tcv" f g"rc"r tqxkpek" f g"
Dwgpqu' Ck gu0Gp'r ct'kwrt."rc"ugi wpf c'hwg'eqput wkf c"gp"4234"*eqo gpl cpf q"rc"r tqf weekp"gp"
4237+'c'tc" f gn'x'pewm"eqp"Vq{ qvc0Gp"4244."rcu'xgpwu'c'rc'cwqo qvtk 'lcr qpguc'tgr tgu'pvcdp"
gn'; 7' "f gn'pqi qekq" f g'K . 'xgpf k' pf qng' uqr qtvgu.'tcf kcf qtgu.'r kret gu'f g'r wgtc.'r cpgrgu'tcugtqu."
r kuqu' f g"rc"eclc" { "r ctei qrr gu"vtcugtqu0'Gu" f gekc."guvc"cwqr ct'kuc" guv' "gur gekrk cf c"gp"rc"
r tqf weekp" f g'eqo r qpgp'vgt'gr'v'xco gpvg"uko r ngu"gp"v² to kpqu'vgepqni kequ" { "eqp"wp"dclq"
xcmq'ci tgi cf q"gp"eqo r ctcekp"eqp"qvtq'vr q" f g'eqo r qpgp'vgt'0Cf go a u."gn'vr q" f g'r kgl cu's wg"
hdtlec'K "uqp" f g'vco c^o q'o gf kcpq/i tcpf g.'r qt'm'ewcn'mqu'eququ'hqi 'v'kequ' f g'guvcu'uqp'cnuqu."
guv'ng'r gto kg'vpgt'wpc'o c{ qt'xgpvcl'c'r ct'vt' f g'rc'egtecp'c'i gqi t^a hlec'eqp'rc'vgt'o kpcn'ht gpvg"
c'rcu'ko r qt'vckppgu0'Gn'7' "tguv'pvg'gu'xgpf kf q" c'I gpgtcn'O qvqtu" { "O gtegf gu'Dgp| "Cti gpv'pc"
c" v'cx² u' f g' qvtq" r tqxggf qt" *Ectm" Rcp." gpvtgxkuc" r gtuqpcn" 3744244+0' Gp" 4243" I wkf k'
go r r'gcdc'ct'gf gf qt' f g'722"r gtuqpcu0'

Gur ge'heco gpvg."rc'cwqr ct'kuc"eqo gpl »'uw'tgr'ekp"eqo gtekn'eqp"VCUC" f guf g"s wg"
2 uvc" mgi c" cn' r c'ju0' Gp" f lej q" o qo gpvq." I wkf k' eqp'vdc" eqp" v'gu" xgpvclcu" ko r qt'v'p'vgtu" gp"
eqo r ctcekp"eqp"qvtcu'r qv'p'ek'rgu"go r t'gucu'eqo r g'v'f qt'cu0'Gp'r tko gt' nwi ct."v'p'c'wpc"xcuvc"
g'zr g'k'p'ek"gp"rc'lpf wutlc'o gvc'm ge^a p'lec" { "gr'xcf cu'k'p'xgtuk'ppgu"gp"cev'xqu'hkqu"*42" r t'gpucu"
f g'guvco r cf q" { "wpc"r r'pvc'w'lecf c"gp"Dwt| ceq+."m" s wg'tgr t'gu'pvc" wpc" xgpvcl'c'ht gpvg" c"rc"
f h'ew'ncf "f g" g'p'eq'vt'ct" qvtqu'r tqxggf qt'gu's wg" guw'x'k'g'cp' f kur w'guvqu" c't'gcnk' ct' k'p'xgtuk'ppgu" f g"
guc'o ci pkwf "gp"rc'Cti gpv'pc0'Gp'ugi wpf q' nwi ct."c'tc" f g'rc'et'kuku's wg'v'c'x'gucdc'rc'lpf wutlc"
cwqr ct'kuc"gp"rc" f² ecf c" f g"3; ; 2."rc"go r t'guc"pq"v'p'c'o wej q"xq'no gp" f g'p'qi qekq"gp" Gug"
o qo gpvq" { "eqp'vdc"eqp"ecr c'ekf cf "qekquc."m'ewcn'h'cek'k'»'s wg'r w'f k'g'tc' f guv'p'ct'rc'o c{ qt' r ct'vg"
f g"uw'r tqf weekp" c" Vq{ qvc" Cti gpv'pc0' H'p'cm gpvg." { "f g"o cp'g'tc" h'w'p'f co gpvcn"rc"go r t'guc"
cti gpv'pc"o quvt»'wpc'co r r'k' f kur qu'ekp"r etc'eqo gpl ct'c'ko r ngo gpv'ct'gn'VRU"gp"uw'r r'pvc' f g"
Dwt| ceq" { "eqpu'q'rk' ctug"gp"gn'rc'ti q" r r'q" eqo q"wp"r tqxggf qt" guv'c'v² i keq" f g"rc" h'k'cn' f g"rc"
vgt'o kpcn'lcr qpguc0'Gp"qvtcu'r c'ncd'tcu."rc"r tqxggf qtc' f gekf k' »'uw'lgvctug" c'mu'r t'qeguqu' f g'eqp'v'q'n'
ko r ngo gpv'f qu"r qt"VCUC."v'p'vq"uqdtg"uw'r tqf weekp."eqo q"uqdtg"uw' guv'wewtc" f g'eququ"

*Twdkq"gv'crf)4244+0⁵⁴"C"r ctvk"fg"guv"r tqeguq. "i cp»"rc"nekcek»p"fg"58"r ctvgr"ctc"VCUC"gp" 3; ; 90'

" C"tc" "fg"guv"x"pewq. "rc"htoc"i gpgt»"wp"r tqeguq"fg" *escalamiento gerencial*, swg" ko r rle»"rc"cf s wulek»p"fg"pwgxcu"hqto cu"qti cpk cekqpcngu" { "v eplecu"cxcp| cf cu"fg"i guk»p"gp" rc"htoc" *Twdkq"gv'crf)4244+0Guv"f ko gpuk»p"gu"fkfeko gpvg"tcpuo kldng"r qt"r ctvg"fg"rcu"htoc" cu" rff gtgu"fg"rcu"EI X. "r qt"rq"ewcn"rc"fgelk»p"fg"r tqhgukqpcrk cek»p"r qt"r ctvg"fg"rc"hco krc"fg" c" fg"i wkf k"hwg"wp"r tko gt"r cuq"ercxg"gp"cs wgm"fg" kgeek»p"0"Cu" "gp"422: " { "422; "rc"cwqr ctvkrc" eqpvtc»"c"fg"qu"fg"kvxqu"fg"o wmkpcekqpcngu"eqp"rc"ti c"vtc { gevqtk"gp"rc"kp" wutkc"cwqo qvtk" { " eqp"gzr gkqpek"gp"rc"i guk»p"fg"r { o gu."r ctc"mq"r wguqu"fg"fg" k gevqt"kp" wutkc" { "fg" k gevqt" eqo gtekrf⁵⁵" Guqu"cr qtvtqp"r t^a evlecu"fg" *management*"r tqhgukqpcn"fg" guf g"eqo r c^o "cu"gp"rc" htqpgtc" kpgtpcekqpcn" { " rkf gtctqp" eco dkqu" s wg" r gto kktqp" eqpuqrf ct" ecr cekf cf gu" r ctc" i gukqpc" { "mgxct"cedq"tcpuhqto cekqpgu"r tqf wvxcu"ko r qtvcpgu" { "cu"ugpvt"wp"dcug"o^a u" u»rkf c"r ctc"gnr quvgtk" *upgrading de procesos*"gp"dcug"c"rc"ko r ngo gpvcek»p"fg"gn"VRU"

" Nc"eqputweek»p"fg"rc"ugi wpc"r rpv"eqo gp| »"gp"4234. "cpvgr"fg" s wg"rc"cwqr ctvkrc" i cpg"rc"nekcek»p"fg"pwgxcu"r kgl cu"r ctc"rc"pwgxc"J kwz"gp"42370"Ugi Àp" Hgtpcpf q"Ecvtq. " fg" k gevqt"fg" Rrcpkhecek»p" Gvtc^v i kec"fg" guf g"4228" { "r ctvg"fg"rc" hco krc"r tqr kvgtk. " "no sabemos que Toyota iba a darnos una orden de compra por el nuevo modelo, pero sí sabemos que para conseguirla teníamos que apostar por el desarrollo de la empresa. Y esa apuesta fue construir la fábrica de Zárate" "Kp" wutkc"i wkf k"4242+0" F g" guv"o qf q. "c"r ctvk"fg" guv"r rpv. "ug" tgf wgtqp"gp"i tcp"o gf kf c"mq"vgo r qu"fg" tcpu r qtvg"fg" c"rc"o c { qt"egtecp" "eqp"rc"lf dtkec"fg" Vq { qc0'

" Nwgi q."gp"4237"i wkf k"i cp»"rc"nekcek»p"fg"339"r ctvgr"ctc"gn"pwgxc"o qf grq"J kwz" { " qdri »"c"rc"htoc" c"ct"j cek"wp"hwgtv"r tqeguq"fg"cwqo cvk cek»p. "kpetgo gpvcpf q"gnp"Ào gtq"qvcn" fg"tqdqu"0" Guv" Ànko c" kpeqr qtcek»p"fg" vgepqmji " "hwg"r ctvg"fg" wpc"fg" gekuk»p"fg"rc" hkrkn" lcr qpguc. "s wg"eqo r t»" vqf qu"mq"tqdqu" Mcy cucnk⁴⁵⁶" { "mq"egf k»"gp"eqo qf cvq" c"uw"htoc" r tqxggf qtc0C"uw"xgl. "c"r ctvk"fg" guv"nekcek»p. "i wkf k"cf s wtk»"r tgpucu"tcpuht. "o^a s wpcu"fg" guvco r cf q"gp"rc"htqpgtc" kpgtpcekqpcn"gp"ewcpvq" c"uw"vgepqmji " " { "pq"o w { "eqo wpgu"gp"rc" Cti gpvpc. "kpxgtukqpgu" tgcnk cf cu" eqp" hpcpeko kpgv" r tqr kq0' Cf go^a u. "rc" r tqxggf qtc" hwg" dgpghkektk"fg" wp"et² f kq" HQP F GCT"fg" gn"i qdktqp"pcekqpcn"gp"4237"r qt"wp"qvcn"fg" &39"

⁴⁵⁴"Gp"r ctvewrt. "fg" guf g"i wkf k"uqkpgp" s wg" "a Toyota le interesa la reducción de costos, pero por mejoras de la productividad, reducciones naturales, no forzadas, como muchas otras veces con alguna otra terminal" *Ectnqu" Rcp."gpvtgxkrc"r gtuqpcn"3744244+0'

⁴⁵⁵"Wpq"fg"gnqu"gu"gn"gpvtgxkrcf q. "Ectnqu"Rcp. "fg" k gevqt"kp" wutkc"fg"rc"eqo r c^o "cu"fg" guf g"422: 0'

⁴⁵⁶" Mcy cucnk" J gcx { " Kp" wutkc"gu" wpc" eqtr qtcek»p" o wmkpcekqpcn" lcr qpguc" fg" kcf c" c" rc" hcdtkecek»p" fg" o qvqelengcu. "xgj "pewq" { "fg" kmpqu"gs wkr qu"kp" wutkc"gu"0'

o kmpgu*cr tqzko cf co gpv'w&u3.7"o kmpgu'cn'vr q'f g'eco dlq"qhkek'f g"4237+ "f g'rc"o kuo c" hqto c's wg'hq'j lektq'Vq{ qvc" { 'F g'puq"R" i kpc"34."34I; 4236+0Gu'k'p'vgt'guc'p'v'f'g'w'cect's wg'g'uc'u' kpxgtukppgu'hwgtq'p'cr w'g'uc'u'r tqf w'v'x'cu'f'g'I w'k'k'g'p'g'n'eq'p'v'z'v'q'f'g'n'r t>>zko q'eco dlq'eqo r ngv' f g'n'o qf g'q'f'g'rc'r k'ni'vr "J k'wz"4237" { "rc"gzr g'ev'x'c'r qt'g'n'c'wo gpv'q'f'g'uw'r tqf w'ee'k'p'0⁵⁷"

Gu'f'gekt. "rc"cwqr ct'v'k'rc" f'ge'k'f'k' »'t'g'c'rk' ct" k'p'x'g't'uk'p'p'gu"q'p'g't'q'uc'u"eqp"rc"gzr g'ev'x'c" f'g' r t'g'r ct'ct'c"rc"ht'o c'r ct'c"wp"gx'g'p'w'c'n'c'wo gpv'q'f'g'rc'r tqf w'ee'k'p"uk'p"rc"eg't'v'g' c'f'g's wg'rc"hk'k'c'n' l'c'r q'p'g'uc'ig'q'v'q'ti ct'c'g'n'p'g'i q'ek'q'0'P q'q'd'uc'p'v'g.'rc't'g'rc'ek'p'f'g'eq'p'h'c'p' c' { "rc'ti q'r rc' | q'eq'p'ut'w'k'c" g'p't'g'co d'cu'r ct'v'g'u'o k'ki »'gp'i t'cp"o g'f'k'c"cs w'g'n't'k'g'ui q'0'G'p"gu'g'ug'p'k'f'q. "E'ct'm'u'R'c'p."f'k'g'ev'q't" k'p'f'w'ut'k'c'n'f'g'I w'k'k'f'g'uf'g"422: . "u'q'v'k'ep'g's wg'"*el crecimiento de Toyota y los planes a largo plazo permitieron planificar y arriesgar para esta planta. Si uno no tiene un cliente confiable es más difícil*" *E'ct'm'u'R'c'p."g'p't'g'x'k'uc'r'g't'u'q'p'c'n"37'4'4244+0'C'f'g'o^a u."H'g't'p'c'p'f'q'E'c'ut'q'r'rc'p'v'g'c" s'wg'"*la decisión de Toyota de exportar a Latinoamérica nos dio un horizonte, un largo plazo. Eso te permite decidir una inversión con menos temor a los vaivenes de la macroeconomía argentina*" *k'p'f'w'ut'k'c'u'I w'k'k"4242<4: +0'

" G'p" g'n' ec'uc'q' f'g'n' x'p'ew'q' f'g" I w'k'k' eqp" Vq{ qvc" C'ti g'p'v'k'p'c." m'u" g'h'g'ev'qu" f'g't't'co g' f'g" r tqf w'v'x'k'f'cf" { "v'g'ep'q'n'i k'equ"hwgtq'p"v't'ee'k'q'p'cf'qu"r'qt" f'qu"vr'qu" f'k'v'k'p'qu" f'g"o g'ec'p'k'uo qu'< cs w'g'm'u'd'cu'cf'qu'gp'g'n'eq'p't'q'n'f'g'g'u'v' p'f'ct'g'u" *benchmarking. 't'g's w'g't'ko k'ep'v'qu" f'g'ec'rk'f'cf. "o g'cu" f'g'r tqf w'ee'k'p"+ { "cs w'g'm'u'd'cu'cf'qu'gp'rc'r' t'q'o q'ek'p'f'g'ec'r'c'ek'f'cf'g'u" *f'g'o q'ut'c'ek'p'g'k'o k'ce'k'p'." e'c'r'c'ek'c'ek'p'."cf' s'w'k'ule'k'p'f'g'v'g'ep'q'm'i c'c-00 k'ep't'cu's w'g'h'u'r' t'ko g't'qu'g'u'v' p'c'u'q'ek'f'qu'c'x'p'ew'q'u" f'g'ect^a ev'g't'g't^a ts w'le'q" { "f'g'r g'p'f'k'ep'v'g."m'u"ugi w'p'f'qu'ug'ect'ce'v'g't'k' cp"r'qt"rc"j'q't'k'q'p'v'c'rk'f'cf" { "rc" eq'q'r g't'c'ek'p'0'G'p"gu'g'ug'p'k'f'q. "u'q'p'h'w'p'f'co g'p'v'c'g'u'r'ct'c'cr'q' { ct'r' t'q'eg'uc'qu'f'g'cr' t'g'p'f'k'cl'g'f'g'p't'q'f'g" r'cu'ht'o cu' { "s'wg'rc'u'gz'ki g'p'ek'cu" { "g'u'v' p'f'ct'g'u'lo r w'g'u'v'qu'r w'g'f'cp'ug't'ew'o r r'k'f'qu'0'

" G'n'up'g'rad'ing' de p'ro'ce'sos's w'g't'g'c'rk' »'I w'k'k'c'r' ct'v'k'f'g'uw'x'p'ew'q'eqp"Vq{ qvc"C'ti g'p'v'k'p'c" w'x'q'f'qu'j'k'qu'erc'x'g'<rc'lo r ngo g'p'v'c'ek'p'f'g'n'VRU" { "rc'cf' s'w'k'ule'k'p'f'g"o cs w'k'p'ct'k'c"gp'rc'ht'q'p'v'g't'c" v'g'ep'q'n'i k'ec."m'u"s w'g'k'o r r'le»'g'n'ht'v'c'g'eko k'ep'v'q'f'g'rc'u'ec'r'c'ek'f'cf'g'u'q'r g't'c'ek'q'p'c'g'u" { "f'w'r'ile'c'v'x'cu" f'g'p't'q'f'g'rc'ht'o c'00 k'ep't'cu's w'g'rc'u'r' t'ko g't'cu'ug't'g'rc'ek'q'p'c'p'eqp'rc'u'j'cd'k'k'f'cf'g'u'o c'p'w'c'ew't'g't'cu" d^a u'le'cu."rc'u'ugi w'p'f'cu'ug't'g'h'k'g't'g'p'c'rc'cf' s'w'k'ule'k'p" { "w'u'q'f'g'v'g'ep'q'm'i c'c'g'z'v'g't'p'cu."eqo q'gp'g'n'ec'uc'q" f'g"rc" k'p'uc'rc'ek'p" f'g"m'u" t'q'd'qu" M'cy cu'c'n'k' { "rc'u"r' t'g'p'uc'u" v't'c'p'uh't'0' G'n' f'g'uct't'q'm'q" f'g" g'uc'u" e'c'r'c'ek'f'cf'g'u'hw'g'm'u's w'g'ig'r'g'to k'k'»c'I w'k'k'o g'l'q't'ct'uw'u'r' t'q'eg'uc'qu'f'g'r' tqf w'ee'k'p'g'k'p'et'go g'p'v'ct" uw'r tqf w'v'x'k'f'cf'0'U'k'p'go d'cti q."gu'g'c'wo gpv'q'gp'rc'r' tqf w'v'x'k'f'cf'p'q'ug'x'k'q'ce'qo r c^o cf'q'f'g'v'p" k'p'et'go gpv'q'f'g'rc'eqo r ng'k'f'cf. "k'p'p'q'x'c'ek'p"q'f'k'g't'g'p'ek'c'ek'p'f'g'm'u'r' tqf w'ev'qu'0'

⁴⁵⁷"G'p"gu'g'o qo gpv'q'Vq{ qvc"C'ti g'p'v'k'p'c'r'rc'p'k'k'ed'c'r'c'uct'f'g'rc'u"; 2022'w'p'k'f'cf'g'u'f'g'rc'i' g'p'g't'c'ek'p'c'p'v'g't'k'q't'c'w'p'cu' 3620220'

" Gp"tguwo gp."kpf wutkcu"l wlf k'ctcxgu»"wp"hwgtvg"r tqeguq"f g"fgucttqm" c"r ctvt" f g"uw" x"pewm" eqp" VCUC' Gp" r tkpek kq." ug" f guvcec" gn' guecno kpvq" i gtgpekn" c" r ctvt" f g" n" r tqhgukpck cek»p" f g"uwu" f ktgevxqu." {"gn'upgrading de procesos c'tc" f g"n"ko r ngo gpcek»p" f gn'VRU" {"n"cf qre k»p" f g"pwgxc"o cs wkpctk0Nc"go r tguc"etgek»"gp"i tcp"o gf kfc"cdtkpfp q"wp" ugi wpc" r rnpw." f guvpcf c" c" cdcugegt" gpvtco gpvg" c" VCUC' Guvq" ng" r gto k»" cwo gpvt hwgtvg" gpvg" uw" ecr cek cf" f g" r tqf week»p0 Cf go "u." gp" guv" kpuvpek" ug" mgx»" c" ecdq" wpc" cwqo cvk cek»p" f g" r ctvg" f g" uwu" r tqeguqu." gp" n" ewen' VCUC" wxq" wp" tqn' r tgr qpf gtcpg" hcekk» pf qng"n"o cs wkpctk0C"uw'xgl . "ug" f guvcec"n"ko r qtvppek" f g"mu"et2 f kqu" HQP F GCT" gp" f lej c" gwr c." f g" hqto c" ulo krt" c" VCUC" {" F gpu0' F g" vqf qu" o qf qu." gn' guecno kpvq" f g" n" cwqr ctvuc" pq" ug" xkq" ceqo r c° cf q" f g" wp" kpetgo gpvq" f g" n" eqo r nglk cf." kppqxcek»p" q" f kgtgpekcek»p" f g"mu" r tqf wvqu." eqo q" vco r qeq. " f g" wpc" o c { qt" ngi cf c" c" qvtcu" vgt"o kpcrgu" f g" Cti gpvpc" q" gn'gzvgtkqt0

"

5.4.3.2 - Esteban Cordero

Guvdcp"Eqtf gtq"gu"wp"go r tguc"o gcm ge^a plec"ho kkt" f g" ecr kcrnu"necrgu"hwpc" f c" gp"3; 76"s wg"eqo gp" »"hdtlecpf q"dluci tcu." r gf crgtcu" {" r crpecu" f g"eco dk" r ctc" Hk'0Gp"4243" n" hto c" vgp" f qu" r rnpvcu" gp" n" r tqxkpek" f g" Dwgpqu" Ck gu" f guvpcf cu" c" n" hdtlecek»p" f g" f kpvpcu" r kgl cu" f g" ecttqegt" guvco r cf cu" gp" h" {" "ecrkpv" {" go r ngedc" c"557" r gtuqpcu"0

Gp" r tko gt" nmi ct." guv" go r tguc" vggp" wpc" r ctvewrtkf cf" gp" eqo r ctcek»p" eqp" gn' tguvq< f guf g" n" r tko gtc" f² ecf c" f gn'4222" f gekf k»" vtdclct" u»m" r ctc" enkpvgu" lcr qpugugu." mu" ewcrgu" uqp" Vq { qv" *xgi "pewm" {" J qpf c" {" [co cj c" *o qvqekengvcu"0' Guvq" ug" f gdg" r tkpek cm gpvg" c" gztgkpekcu" pgi cvkcu" eqp" qvtqu" enkpvgu"0 Gur ge" heco gpvg. "Lwkq" Eqtf gtq. "j kq" f gn'hwpc" f qt" f g" n" hto c." Guvdcp" Eqtf gtq. "tgo ctec" f qu" f g" gmu'0Nc" r tko gtc." ewpcf q" Hk'v" f gekf g" tgeqo r tet" r ctvg" f g" Uxgn'gp" Cti gpvpc" c" o gf kfc qu" f g"3; ; 20Rctc" gug" r tq { gevq. "Guvdcp" Eqtf gtq" tgrk »" wpc" i tcp" kpxgtu»p" eqpwt w' gpf q" wpc" pwgxc" r rnpw" r ctc" cdcugegt" gzenwukxco gpvg" c" n" vgt"o kpcn' kcrkpc0Ukp" go dcti q. "gp"3; ; ; "Hk'v" f gekf k»" hkpck ct" n" r tqf week»p" gp" gn' r c" u" {" "vcurf ctr" c" Dtcuk'0Guv' b qxko kpvq" lki pkk»" i tcpf gu' r² tf kf cu' r ctc" n" cwqr ctvuc. " f g" hqto c" vns wg" guwxq" cn' dqt f g" f g" gpvtct" gp" eqpxqecvqtk" f g" cetggf qtgu" *Lwkq" Eqtf gtq. " gpvtgxkuc" r gtuqpcn" 3344244-0

Nc" ugi wpc" f hwg" wpc" gztgkpek" hcmk c" eqp" qvtq" enkpvgu"0Gp" guv" ecuq" Guvdcp" Eqtf gtq" ng" r tqxg" r kgl cu" f guf g" gn' ugi wpc" q" cpkm" c" wpc" cwqr ctvuc" f gn' tko gtq. "Xkvgqp. "wpc" eqo r c° "c" o wkpcekqpcn' guvcf qwpk gpug. "n" ewen' hdtlecdc" n'ecm gpvg" mu" vcdrgtqu" f gn' Hqt f "Hqewu"0Rgtq. " c" r ctvt" f g"4229. "n" hto c" pqt vco gtlepc" wxq" wp" eco dk" i nqdcn' {" f gl»" f g" cdcugegt" gucu" r ctvuc. "

rcu'ewcrgu'r cuctqp" c"qvtqu'r tqxggf qt gu'kpvtgpcckpccgu. "r qt 'mq'vcpvq. 'Guvgdcp'Eqtf gtq'pq' r wf q" ugi wkt'vtcdclcf q"eqp"guvg'enkgpvg" *Lwtk'Eqtf gtq. "gpvtgxkuc"r gtuqpcn"33 44244-0'

C" r ctvk" f g" gmj. "rc" go r tgu" f ghpk" "una visión estratégica, concentrándonos en clientes japoneses" f gdlf q" c"uw" "respeto por la cadena de valor" 0Uw'r tko gt"eqpvcvq"eqp"wp" enkgpvg"lcr qp² u'hwg"eqp"VCUC" f guf g'uw'mgi cf c"cn'r c"u0Cn'r tkpek kq. "eqo gpl »"r tqf wek pf qrg" cni wpcu'r kgl cu" c" wpc" r tqxggf qtc" f gn'r tko gt" cplmq" s wg" ng" xgpf "c" Vq{ qvc0'Nwgi q. "cpvg"rc" ko r quklrkf cf 'f g'guc"cwqr ctvkuc"Vlgt'3'f g'f gucttqmt'cni wpcu'r kgl cu'b gvcw geª pkecu. 'Eqtf gtq' eqo gpl »"c'xgpf gtrg" f kgevc" gpvg" c" VCUC0"

Ukp"go dci q. "gn'i tcp'ucmq"gp"gn'xqno gp" f g"eqo r tcu'f g"rc"vgt"o kpcn'lcr qpvcu"ug" f kq" c" r ctvk" f gn'4223. "ewcpf q" Vq{ qvc"grki g" c" Guvgdcp'Eqtf gtq'eqo q"rc" hcdtkcpvg" f g'62"eqplwpvu" f g" r kgl cu'r ctc"rc"pwgxc"xgtuk"p" f g"J kwz" f gn'r tq{ gevq"KO X0Rctc"r qf gt"i cpct" f kej c"hekckep. "rc" cwqr ctvkuc" f gdlk" ko r ngo gpvt" gn' VRU" gp" uuu" r ncpvcu" eqp" rc" c{ wf" c" f g" VCUC0' Nc" ko r ngo gpvcckep" f g'guvg'ukwgo c'hg" c{ wf »"c" cwo gpvt"uwu'pkxgru" f g'ghkckpek"uwucpekco gpvg0"

C"uw" xgl . "c" r ctvk" f g" guc" r tqhwf k ckcp" f gn'x"pewu. "VCUC" ng" qhtgek" c" Eqtf gtq" xgpf gtrg" r kgl cu" c" Vq{ qvc" Dtcukl' r ctc" mqu" o qf grqu" Eqtqmc. "r tko gtq. " { "Gvku. "f gur w² u0'Guw"ng" r gto klc" c"rc"cwqr ctvkuc" gzr qtvt" f wcpvg" xctkqu" cº qu" c" Dtcuk0'Ukp" go dci q. "gp"rc" ugi wpc" f² ecf c" f gn'4222" rc" hkn'ectkqec" eqo gpl »" c" dwæct" r tqxggf qt gu" mcecg. "f gur rc| cpf q" rcu" gzr qtvcckppgu'cti gpvcu. "gpvtg" gmcu" c"rc"cwqr ctvkuc" o gvcn'Ati lec0Cn'4243. 'Eqtf gtq'ng" guvdc" gzr qtvcpf q"wp" pÀo gtq" o "pko q" f g" r kgl cu" c" Vq{ qvc" Dtcukl' r ctc" gn' o qf gm" Gvku" s wg" nwi q" gzr qtvcp" c" Cti gpvc" { "Wwi wc{ 0'

Rqt"qvtq'rcf q. "gn'x"pewu"eqp" Vq{ qvc"rgu" r gto klc" "eqpvcvtug"eqp" [co cj c. "r tqf wevqtc" f g" o qvqu"gp" Cti gpvc0'Gur ge"heco gpvg. "gn'i gtgpvg" f g"eqo r tcu'f g" [co cj c'] cd" c"vtcdclcf q"gp" VCUC" { "r qt" guq" eqpqc" c"rc" cwqr ctvkuc0'Uw" qvtq" enkgpvg" lcr qp² u" gu" J qpf c. "cn'ewcn'rgu" xgpf kgtq" r kgl cu" r ctc" o qvqelengcu0' F guf g"rc" go r tgu" r tqxggf qtc" o ctecp" s wg" guvcu" f qu" eqo r cº "cu"co dk² p"wxkgtq" r tqdrgo cu'f g" r tqf week"p. "ukp"go dci q. "gn'vcvq"eqp"rc"cwqr ctvkuc" hwg" o w{ "f kwpvq"cn'f g"mqu'enkgpvu"qeekf gpvcrgu0'Rqt" glgo r mq. " [co cj c" dcl »"uw" r tqf week"p" f g" 32022" wplf cf gu" c"3022" { "J qpf c" f gl »" f g" r tqf wek" xgj "pewu"gp" gn'r c"u"gp"423; 0P q"quvcpvg. " c"r guct" f g" guvcu"eco dkqu. 'Eqtf gtq' uqukpgg" s wg" uki wgtq" vplkpgf q' t gur gvq' r qt'uwu" r tqxggf qt gu. " vtcwpcf q" f g' t gur gvct" mqu" cewgtf qu'eqo gteknqu" { "eqo r tctgu" mqu" oª zko q" s wg" r qf "cp0"

F g'guvg" o qf q. "f guf g"rc" r tqhwf k ckcp" f g'guvg" x"pewu. "c" kplekqu" f g" mqu"4222. 'Eqtf gtq' u»m" dwæc" enkgpvu" lcr qpvgu. " { c" ugc"p" cwqr ctvkuc. "vgt" o kpcnqu" q" r tqf wevqtcu" f g" o qvqelengcu0' Gp" r ctvkewrt. "uqdtg" guvg" vkr q" f g" go r tgu" Eqtf gtq' uqukpgg" s wg" "te exigen, la eficiencia, pero la visión a largo plazo ayuda mucho a poder invertir, poder seguirlos. Esa es la diferencia

fundamental. La planificación es sustentable. Siempre incrementando de a poco” *Lwtkq
Eqtf gtq."gpvtgxkuc'r gtuqpcn"33 44244+0'

Cufl'Guvdcp'Eqtf gtq'gu'qvc'f g'rcu'go r tgu'c's wg'ngx»'c'ecdq'wp'r tqeguq'f g'upgrading
de procesos c'r ctvt'f g'rc'ko r ngo gpvclep'f gn'VRU0'Gp'r ctvewrt."gn'i tcp'ucnq'f g'guc'hko c'
hwg'eqp'gn'eco dlq'f g'o qf gm'f g'rc'J kwz'KO X0F'g'hqto c'uko krc't'c'I wfk'k'uk'dkqp'r wf'q'o glqct'
uu'plxgrgu'f g'r tqf wevklf cf."guq'pq'tgf wpf »"gp'qvtq'vkr q'f g'guc'nc'o kgpvq."eqp'kpwcpf q'eqp'rc'
hcdtlecep'f g'r r kgl'cu'o gvcn'Àti kcu'tgrv'xco gpvg"uko r ngu'Ukp"go dci q."gug'x'pewuq"u'fl'ng'
r gto kl»"ceegf gt" c" gZR qtvekp'p'g'u"Vq{ qvc"Dtcukn" { "qvtqu'r tqf wevqtgu" *fl' co cj c" { "J qpf c+ "
vqo cpf q'rc'r ctvewrt'f gekul»p'f g'tcdclct'uqmq'eqp'enk'p'v'gu'lcr qpgugu'f gdlf q'c'rcu'gZR g'k'p'ekcu'
hcnk'cu'eqp"uqekqu'qee'f gpvcrgu" { "rc'r qukd'klf cf "s wg"guvcu'tgrv'ek'p'p'g'u"ng'dtkpf c'r ctc'tgcrk' ct'
kpxgtuk'p'p'g'u" { "r r'p'k'lect" cwo gpvqu'f g'uw'r tqf wevlep'0'

5.4.3.3 - Ventalum

" Guc'cwqr ctv'kuc'gu'wpc'go r tgu'c'hco krc't'f g'ecr kcr'gu'p'ce'k'p'c'rgu'w'dke'f c'gp'rc'hqecrk' cf "
f g'Ucp'O ctv'p.'r tqxk'pek'f g'Dwgpqu'Ck'gu'0Nc'eqo r c°'f'ug'hwpf »"gp'3; 88.'hcdtlecpf q'xgpvcpcu'
r ctc'dwugu'w'dcpqu" { "f g'rcti c'f kuc'pek'c'r ctvt'f g'r gth'k'gu'gz'v'w'k'qu'f g'c'nc'o k'p'k' { "xk' tkq'0'

Uw'r tko gt'eqp'cev'eqp'wpc'v'gto kpcn'cwqo qvtk' f g'xgj 'pewuq'p'q'r gucf qu'hwg'gp'3; ; 8"
eqp"Vq{ qvc."ewcpf q"² uvc"dwuecdc" r tqxggf qtgu'0'Gn'x'pewuq"ug"tgc'rk' »"c"v'cx²u" f g' Cndgtvq"
Hgt'p' pf gl ."gn'uqekq'm'ecn'f g"VCUC"cn'o qo gpvq'f g'uw'tcf kecep'."s wg'eqp'q'c'c"Xgpvcnwo "c"
r ctvt'f g'uw'v'ev'klf cf "gp'rc'eqo gte'k'rk' cep'f g'dwugu'0Tc'ÀriCo kn'j klq'f g'w'p'q'f g'rcu'hwpf cf qtgu'
f g'rc"go r tgu'c" { "r t'g'kf gpvg'f g'g'm' f g'uf g"4227."uqu'k'p'g's wg"rc" qti cpk' cep'p'v'p'f'c'gucuc"
gZR g'k'p'ek' { "ecr'cek' cf "gp"rc" k'p'f w'w'k'c"cwqo qvtk' "j c'uc" h'k'p'gu'f g'rcu"; 2a"o "a"u'cm' "f g'rc"
hcdtlecep'f g'xgpvcpcu'r ctc'dwugu" *Tc'ÀriCo kn'gpvtgxkuc'r gtuqpcn"3; 18 44244+0"

" Cn'l'p'lekq."VCUC"ng'r k'f k»"c"Xgpvcnwo "tgc'rk' ct" wpc"xgpvcpc"v'cugtc'r ctc"rc"J kwz."r gtq"
n'wgi q'ug'f g'uk'k' »f g'k'p'eqtr qtct'gug'grgo gpvq'cn'xgj 'pewuq'0Ukp"go dci q."gug'r tko gt'eqp'cev'rgu"
r gto kl»"s wg"n'wgi q'ng"r tqr qpi cp" c"rc"cwqr ctv'kuc"tgc'rk' ct"rcu"gu'w'kdqu'f g'c'ue'p'p'q"r ctc"rc"
eco k'p'p'gvc'0'Gu'f gek'."gp'gug'r tqeguq"r ctc"ugt"r tqxggf qt'f g"VCUC."Xgpvcnwo "ngx»"c'ecdq'wp"
upgrading de producto.'hcdtlecpf q'wpc'p'w'gxc'r ctv'g's wg'p'q'j ce'f'c'r t'g'x'kco gpvg."cwps wg'guc'p'q"
gtc"v²epleco gpvg"o "a"u'eqo r r'glc"s wg"rcu'cp'v'g'k'qt'gu'0C"uw'xgl."VCUC"rgu'eqpu'w»"uk'guc'dcp"
f kur w'gu'qu" c" j cegt' f k'w'p'v'qu" eco dlqu" qti cpk' cep'p'rgu" gp"rc" r r'p'vc." uk'p" go dci q."rcu"
o qf k'kecep'p'g'u"o "a"u'r tqh'w'p'f cu'f gn'r tqeguq'k'p'f w'w'k'cn'x'g'p'f t'f'p'w'p'qu" c° qu'f gur w² u'0'

" Gur ge'f'keco gpvg." eqp" gn' r'p' co k'p'vq' f gn' KO X" Vq{ qvc" rcu' cf l'w'f k»" vco dk² p"rc"
r tqf wevlep'f gn'r qtvcgs wkr clgu'r ctc"rc"J kwz" { "rc"UY 60Gp'r ctvewrt."p'k'pi wpc'q'vc'r tqxggf qtc"
hcdtlecdc"r qtvcgs wkr clgu'gp"Cti gp'k'p'c"gp'gug"o qo gpvq" { "c"r ctvt'f g'gmq."Xgpvcnwo "ug"j k'q"

gur gekrku "gp'rc'r tqf wek p'f g'f lej cu'r lgl cu'0Rctc'gn'qvti co kpvq'f g'gug'p'gi qekq. "VCUC'ngu' r kf k'eco dku'o a u'r tqhw'pf qu'gp'rc'r r'p'w'f g'Ucp'O ct'p'0D' uleco gp'v. "gucu'o qf k'kecek'p'gu'ug' g'p'qect'p'gp'go r'ngct'gn'VRU." "trabajar en el proceso. Hacer fluir las piezas de a una. No hacer stocks intermedios. Eso tapa los problemas de calidad" *Tc'ÀnC'o kn'gp'v'g'x'ku'c'r'gtu'q'pc'n' 3; 184244-0'Cu'f' "qu'f k'ge'v'x'qu'eqo gp'v'p's w'g'hw'g'wp'r tqegu'f g'ctf wq'v'cdclq'eqp'k'pi g'p'k'gt'qu' f g'VCUC'gp'rc'r r'p'w'j cu'c's w'g'r w'f k'gt'q'p'ngi ct'c'p'k'g'ngu'f g'ko r'ngo gp'v'ek'p' {"gh'ek'g'pek' c'egr v'cd'ngu'0" ""

" Nwgi q'f g'gug'ucnq. "Xgp'v'c'no "eqo gp' | » "c'r tqx'g'g't'ng" c"q'v'cu'v'g'to k'p'c'ngu'0'c'n't'gur gevq. " Tc'ÀnC'o kn'lu'q'v'k'p'g's w'g' "ser el proveedor de Toyota nos dio el grado de confiabilidad para los demás clientes ". "Gp'r t'ko g't'hw' ct. 'k'p'ek't'q'p'c'r tqf w'ek't'x'gp'v'p'cu'f g'c'no k'p'k'q'r c'tc'rc' 'O g't'eg'f' gu' D'gp' | "Ur t'k'p'v'g't'0' F'guf g' "rc" cw'qr ct'v'ku'c" u'q'v'k'p'g'p' s w'g' j cd'f'p' k'p'v'p'w'f q' ugt' r tqx'g'g'f' q't'gu' f g' O g't'eg'f' gu'gp'rc'f'2'ecf'c'f'g'3; ; 2'r g't'q'rc'v'g'to k'p'c'n'c'ng'o c'p'c'p'q'eq'p'h'k' »gp'g'm'qu'r' q't' u'g't'w'p'c'go r t'guc' ej k'ec' {"p'q'ugt' r tqx'g'g'f' q'tc'f'g'rc'k'p'f' w'ut'k'c'cw'q'o q'v'k' 0'Cu'f' "f'gur w'2'u'f'g'k'p'ek't'c'v'cdclct'eqp' V'q' { q'w. "r w'f k'gt'q'p'c'ee'g'f' g't'c'gug' "er'k'p'v'g'0'Nwgi q. "Xgp'v'c'no "eq'p'v'p'w' » "r tqx'g' { g'p'f' q'q'v'cu'r' lgl' cu' dc'uf' cu'gp'c'no k'p'k'q'r c'tc' "qu'f'ki w'k'p'v'gu'o qf g'ngu'f'g' "Ur t'k'p'v'g't'0" "

Rqu'v't'k'q'to gp'v. "v'o d'k'p' "go r g' l' ct'q'p'c'r tqx'g'g't'ng'r lgl' cu'c' "Xq'm'y' ci gp. "H'q't'f' . "R'g'w'i' g'q'v' E'k't'q'p' {"P'k'uc'p'/T'g'p'c'w'n'0'c' "Xq'm'y' ci gp. "gn'r q't'v'c'g' w'k'r c'l'g'f'g'rc' "U'w't'ep'f' w't'ep'v'g' "qu'34'c'o qu's w'g' ug' r tqf w'l'q'0'F' gur w'2'u. "c'n' "R'g'w'i' g'q'v' 62: . "gn' 52: " {"gn' E'k't'q'p' "E6" ng' j k'ek'g't'p' "gn't'gh'w'g't' | q'f' gn' r c't'ci q'r'g'u'f' g'm'p'v'g't'q. "w'p'c' r lgl' c' "g'ut'w'ew't'c'n'f'g'c'no k'p'k'q'0'Nwgi q. "c' "H'q't'f' "ng' r tqx'g' { g't'q'p' "gn' r q't'v'c'g' w'k'r c'l'g'f'g'rc' "T'c'p'i g't' {"gn'w'd'q'f'g'ng'p'c'f'q'f'g'eqo d'w'v'k'd'ng'f'g'c'eg't'q'k'p'q'z'k'f' c'd'ng. "w'p'c' r lgl' c' f'k'v'k'p'c'c' "u'w'gur gek'r'k'f' c'f' "Tc'ÀnC'o kn'gp'v'g'x'ku'c'r'gtu'q'pc'n'3; 184244-0" ""

Gp't'gu'wo gp. "c'f' go a u'f' gn'upgrading de procesos s w'g'ug'i' gp'g't' » "gp' "Xgp'v'c'no "c'r' ct'v'k'f'g' "rc' "ko r'ngo gp'v'ek'p' "f'gn' VRU." eqo q' "gn't'gu'q'f'g' "rc'u" r tqx'g'g'f' q't'cu' "m'ec'ngu. "g'uc' "cw'qr ct'v'ku'c' "go r t'g'p'f' k' » "w'p'upgrading de producto, h'cd't'k'ec'p'f'q'p'w'g'x'cu'r' lgl' cu's w'g'p'q't'g'c'r'k' c'd'c'r' t'g'x'k'co gp'v'g'0' U'k' d'k'p' "g'uc'u' p'w'g'x'cu' r c't'v'gu' p'q' g't'c'p' "o a u' eqo r'ng'l'cu' s w'g' "rc'u" c'p'v'g't'k'q't'gu. "u'f' "ngu' r g'to k'k' » "gur gek'r'k' ct'ug' "gp'p'lej qu'f'g'r tqf w'ev'qu' s w'g'p'q' » "v'p'f'p' "eqo r g'v'g'pek' "gp' "gn'r c'f'p'0'G'n' "o q'o gp'v'q' d'k'uc'i t'c' "gp'g'uc' "h'k'to c' "hw'g' "eqp'gn'eco d'k'q'f'g'o qf g'ng'f'g'rc' "J k'w'z' "KO X. "ew'c'p'f'q'ug't'g'c'r'k' ct'q'p' "qu' eco d'ku'r' tqf w'ev'x'qu'o a u'ko r q't'v'p'v'gu'0'c' "u'w'x'g'l' . "rc' "t'g'r'ek' » "eqp' "VCUC' "ng'c'd't'l' » "rc'u'r' w'g't'cu' "eqp' q'v'cu'v'g'to k'p'c'ngu'cw'q'o q't'legu'f' gn'r c'f'p'0' "

5.4.3.4 - Polimetal

" Rq'iko g'v'c'n' "gu' w'p'c' "go r t'guc' "m'ec'n' s w'g' "h'cd't'k'ec' "t'w'g'f'cu' r c'tc' "x'g'j' "f'ew'qu'f'g' r cu'cl'g't'qu' {" eqo g't'ek'ngu' "h'x'k'p'qu'w'd'k'ec'f'c' "gp'rc'r' r tqx'k'pek'f'g'Ucp' "N'w'ku'0'G'uc' "eqo r c'o' "f'c' "ug'et'g' » "gp'3; : 8' {"u'w' "

cevkxf cf 'kplekn'gtc'grleqt v'g' { 'tgevkhecf q'f g'cegtqu'r ctc'gr' unkequ' { 'tguqtvgr' ctc'cwqo »xkrqu⁴⁵⁸"
Gp"3; ; 4"ug"hwukpctqp"eqp"rc"go r t guc"Hgttcpcq. "s wg'qhtge'c'ugt xlekqu'f g'eqt v'g'f g'ej cr c. " { "gp"
4227"go r g' ctqp" c'kpewtukpct"gp"rc"hcdtkecek»p" f g'mcpvcu'f g'cngcek»p. ⁴⁵⁹"wp"r tqf wevq" s wg'gtc"
vqcrd gpvg" ko r qtvf q" f guf g" Dtcukf' Nwgi q. " en' ecdq" f g" wpqu" c° qu. " rc" hto c" ug" f gf ke»"
eqo r ngvo gpvg" c'rc"hcdtkecek»p" f g" gug"r tqf wevq" { "ug"eqpxk v»"gp"rc"Àplec"go r t guc"cti gpvkp"
r tqf wevqtc" f g" twgf cu" f g" cno kpkq" r ctc" rc" kpf wutlc" cwqo qv k' 0⁵: "Cn'4243"ug" gpeqptcdcp"
vcdclcpf q"632'r gtuqpcu"gp"rc"eqo r c° c'0""

Gp"uwu'kplekqu. "gr'eqo kgp| q'f g'rc"hcdtkecek»p" f g" twgf cu" f g" cno kpkq" gp"rc"go r t guc"ug"
tgcrk' »"c'r ctvt' f g'wpc'kf gc'f grif wg° q. "gr'go r t guctkq"cti gpvkp" Dceecpgrk "c'r ctvt' f g'uw'xkuk»p"
f gn' cwo gpvq" f g" rc" f go cpf c" f g" guvqu" r tqf wevqu. "cwps wg" vqf cx'c' pq" vgp'c'p" eqpvcvqu" eqp"
vgo kpcrgu'cwqo qv k'gu'r qt" guqu'dkpgu" *O c'cu' O cf ci rk. "gpv'gxkuc" r gtuqpcn"33 44245-0

C'r ctvt' f g'w'p'r tqeguq' f g'kpxgtukppgu' s wg'vqcrk' ctqp"gp" w&u64'b kmppgu'gpv'g'rc" r tlo gtc"
{ "rc"ugi wpc' f c'² ecf c' f gr'4222. "ug"o qf gtpk' »" { "co r rk»"rc" r rcpvc. "mgi cpf q" c"rc" ecr celf cf "f g"
r tqf wek»p' f g'3022022' f g'mcpvcu'cpwcrqu"gp"42350Nc'b c { qt' r ctv' f g'guc'kpxgtuk»p'ug'tgcrk' »"
gp"gr'422; "c'r ctvt' f gnr tlo gt' i tcp'eqpvcvq' f g'rc"go r t guc' r ctc' r tqxgg' mcpvcu'c'rc" Xqmuy ci gp"
Co ctqm' { "Uwcp0⁵: "

Nc" eqpgz»p" eqp" Vq { qc" gp" guvg" ecuq" ug" f kq" r quvgtkqto gpvg" cn' x'pewu" eqp" qv'cu"
vgo kpcrgu'Gp" r ctvewrt. "O c'cu' O cf ci rk. "Eqpvtqr' O cpci gt' f g'rc" hto c' f guf g'4233"uqukpgg"
s wg'gpv'g'4233" { "4235"vtxguctqp"wp"rc"i q' r gt'qf q' f g' f gucttqm' f g'rc" twgf c' r ctc" VCUC'Gp"
i gpgtcn'rc" gu² vlc" { "gnr guq' f g'rc" twgf c' gu'dtkp' cf q' r qt'rc" vgo kpcn' { "rc"cwqr ctv'kuc' f gucttqm"
o gecpluo qu" kpvtpqu" f gn' r tqf wevq" s wg" pq" uqp" xkukdrgu'Gp" r ctvewrt. "Rrko gvcn' r qugg" wp"
f gr ctvco gpvq" f g' kpi gpkgt'c' f g' Rtqf wevq. "f qpf g"ug" f gucttqmcp" o qif gu" { "r kgl cu' Guvq" gu² "
r t kpek' cm gpvg'xkpewrf q' c' s wg'rc"cwqr ctv'kuc' t gcrk' c'cevkxf cf gu' f g'hwf'lek»p. "rcu'ewcrqu'gu² p"
hwgt vgo gpvg' f vgo kpcf cu' r qt' nqu'erko cu' { "rcu'vgo r gtcw'cu'ncrcgu. 'r qt' nqu'ewcn'ug' f gdgp'et gct"
r tqeguq' { "r tqf wevqu'gur ge'hequ' s wg'ug'cf cr vgp" c' gucu'eqpf kekppgu'0F g'guvg'o qf q. "Rrko gvcn'
f gucttqm»"nqu"o qif gu' r ctc"rcu' twgf cu" { "eqo gp| »"c" r tqf wek'rcu'0Cu' "gp"4236"rc" r tqxggf qtc"

⁴⁵⁸"Rrko gvcn'gu' r ctv' f gn'I twr q"TD. "r tqr kcf cf "f gn'go r t guctkq"ncrcn'T qdgtv" Dceecpgrk'0F gpv'q' f g'guvg" i twr q"
go r t guctkcn'rc" hto c' o " u"ko r qtvcpvg" { "cpvk' wc"gu" Hgttquk' gt'0Guc' Ànko c'ug'etg»"gp"3; 8; . "ug"gur gekrk' c"gp"gn'
r tqeguqo kpvq' f g'cegtqu' r rcpqu'no kpcf qu"gp" h'q. "no kpcf qu"gp"ecrkpgv. " { "cegtqu' t g'xguk' qu. " { "cdcugeg" c"rc"
kpf wutlc"cwqo qv k' f guf g'uwu'kplekqu'0

⁴⁵⁹"Uw'r t kpek' cni' tqxggf qt' f g'cno kpkq"gu' Cnwct'0

⁴⁵: "J cunc'4239"rc'crgo cpc' O ghtq"Y j ggm'r qug'c'wpc' f dtlec' f g' twgf cu' f g'ej cr c' f g'o gpqt' xcrqt' { "ecrk' cf "s wg'rcu"
f g'cno kpkq+ "rc"ewcn'rc" j cd'p"eqo r tcf q"cn'I twr q"TD"cpv'gu' f g' s wg'guvg'ug"gur gekrk' ctc"gp"rcu' f g'cno kpkq."
wkecf c'cn'uw' f g' Tquctkq'0Gp"4239'guc' f dtlec'ekgtc' f gdlf q'c'rc'eqo r gvpck' lo r qtvf qtc' { "Rrko gvcn'ug'eqpxk v»"
gp"rc"Àplec' r tqf wevqtc' f g' twgf cu'gp"gnr c' f u' *Erc'p. "36 44239-0

⁴⁵: "Gp"nqu'c° qu"cpv'gtkq'gu'wxkgtqp"cn' wpqu'eqpvcvqu"eqp"qv'cu"vgo kpcrgu. "r gtq"eqp"xqna' gpgu'dclqu" *O c'cu' O cf ci rk. "gpv'gxkuc" r gtuqpcn"33 44245-0

lplek»c"xgpf gtrg"guqu"r tqf wequ"c"VCUC."cwps wg"gp"xqnAo gpgu"delqu."{"Vq{ qvc"eqo gpl »"c" mceck ct"mrcu's wg"gtcp"cpvgr tqf wekf cu'r qt"rc"crgo cpc"O ghtq"Y j ggm"gp"Dtcukn"GnEtqpluc." 4 B 4233-0"

Gp"r ct vewct."gn'glgewkxq"uqukpgg"s wg"wp"lpegpvxxq"gur gekn'r ctc"guv"mceck cel»p" guwxq" f cf q"r qt"rc"rg{ "cwqr ct vuc."{ c"s wg"gp"gm"ug"guvdrgeg"s wg."cf go ^a u" f gn'tgkpgi tq"r qt" eqo r tculf g"cwqr ct vgu"mcegru."ug"lwo c"wp"9' f gn'xcrqt f g"rc"r ct vglukr"r tqxggf qtc"gu"hwf kf qtc" q"htlcf qtc."eqo q"gp"guv"ecuq"O cv"cu"O cf ci nk."gptgxkuc"r gtuqpcn"33 B 4245-0"

Nvgi q."Rrko gcn'cwo gp»"rc"r tqxkuk»p" f g"twgf cu"c"Vq{ qvc."cwps wg"pwpcc"ewdtkpgf q"rc" vcrkf cf" f g"uw"xgj "fwmu"0Cn"4244."rc"r tqxggf qtc"hdtkedc"r tqf wequ"r ctc"cr tqzko cf co gpvg" 62022"xgj "fwmu" f g"VCUC" *crtgf gf qt" f g"wp"52' f gn'vcrn'r tqf wekf q"eqp"twgf cu" f g"cnwo lplq" gp"guv" c^o q-0⁶²"Gn'tguv" f g"rcu"twgf cu"uki wgp"ukpgf q"ko r qtvcf cu" f guf g"Dtcukn"0⁶³"Rqt"qvtq"rcf q." Rrko gcn'lug"gzr cpf k»"c'i tcp"r ct vgf gn' b gtecf q"cwqo qvk' "mecnluwo cpf q"eqo q"enkpgu" c" Hkv." Rgwi gqv."P kuucp."Hqt f {"J qpf c"eqp"o c{ qt gu"xqnAo gpgu" f g"eqo r tc0⁶⁴"

F g"guv"o qf q."guv"ecuq"gu" f kgtuq"cn' f gn'tguv" f g"rcu"cwqr ct vuc"u"mcegru"gzco kpcf cu" Rqt"wp"rcf q."pq"lvtqf wlq"gn'VRU"eqo q"rcu"cpvgtkqt gu"0Cf go ^a u."uw"x"pewm"eqp"Vq{ qvc"mgi »" r quvgtkqto gpvg"cn' f gucttqm{" "gur gekn'k cel»p"gp"twgf cu" f g"cnwo lplq" {" "mqu"eqpvcqu"eqp"qvtcu" vto kpcrgu." ukpgf q" o gpqu" f gr gpf kpv" f g" rc" vto kpcn' lcr qpguc" gp" eqo r ctcel»p" eqp" mqu" cpvgtkqt gu" r tqxggf qt gu" mcegru" Nc" f gekuk»p" f g" Vq{ qvc" f g" uwvkwk" ko r qtvcckpgu" r qt" rc" r tqf wek»p" f g"Rrko gcn'eqp"rc"mgi cf c" f g"rc"pwx"J kwz"guwxq"hwgtvgo gpvg"cuqekf c"cn' b c{ qt" tglpvgi tq"r qt"rc"rg{ "cwqr ct vuc"s wg"guv"qhtge"r qt"tgcnk' ct"cevklf cf gu" f g"hwf lek»p"0C"uw"xgj ." guv" Anko c"ectcevt"luc"ko r nec"s wg" guv" r tqxggf qt" tgcnek" kpxguki cel»p" {" f gucttqm" f g" r tqf wequ."c" f kgtgpek" f gn'tguv" f g"rcu"cwqr ct vuc"u"mcegru"cpck' cf cu"0"

5.4.3.5 – Compañía Regional de Aceros Forjados Mercedes (CRAFMSA)

Guv"go r tguv"gu"wpc"r tqxggf qtc" f g"r kgl cu"htlcf cu" f g"ecr kcrgu"mcegru"wdkecf c"gp"rc" r tqxlpek" f g"Ucp" Nwku"0Gu"wpc" f g"rcu"o ^a u"ko r qtvcpgu"r tqxggf qtcu" f g"r ct vgu"htlcf cu"r ctc"rc" lpf wvkc"o gvm ge^a plec" *r kgl cu"r ctc"gn' o qvt."uwur gpuk»p." f kgtgpekn' {" "tcpuo kukpgu"0Cn' 4242"go r rgedc" crtgf gf qt" f g"822"r gtuqpcu"0"

⁴⁶²"Nqu"o qf gmu"o ^a u" d^a ulequ" f g"hu"xgj "fwmu."crtgf gf qt" f g"wp"42' f g"hu"xgj "fwmu" f g"Vq{ qvc."ngxcp"twgf cu" f g" ej cr c" {" "pq" f g"cnwo lplq"0"

⁴⁶³"Rrko gcn'vkgpg"vgu"i tcpf gu"eqo r gwf qtgu" f g"twgf cu" f g"cnwo lplq"gp"Dtcukn"Kj qr g/O czkqp."P gq" Tqf cu." {" O cpi gnu."vqf cu"gn'cu" f g"ecr kcrgu"dtcukg^o qu"0"

⁴⁶⁴"Gn'glgewkxq"o gpekpc"s wg"co dlk'p"rg"r tqxgf gtqp"twgf cu" c" Tgpcwv"r gtq" f guf g"rc"r tqxggf qtc" f gekf lgtqp" f glet" f g"r tqf wekr" r qt"wpc"r qm'lec" f g"cewcnk' cel»p" f g"r tgeku" f g"rc"vto kpcn' b w' r gtlwf lekcn'r ctc"rc"cwqr ct vuc"0"

Gp"gur gekcn"rc"cevkxf cf "f g"htlcf q"gp"Cti gpvkpc"vpgg"o Ànr ngu"fkhwncf gu"ugi Àp" f kgevqxqu"fg"re"go r t guc0Rqt"wp"rcf q."ug"pgegukcp"cnuc"lpxgtukppgu"gp"ecr kcnr ctc"re"eqo r tc" f g"j qtpqu"{"r tgpuc."r qt"qtq."gn'cegtq"s wg"wkkl cp"pq"ug"r tqf weg"gp"gnr c"ju"{"f gdg"ko r qtvtug" f guf g"Dtcukf⁶⁵"Cf go ^a u."gn'xqmw gp"fg"ri'o gtecf q"cti gpvkpc"gu"dclq"r ctc"guv"cevkxf cf " {"mqu" o ^a ti gpgu"fg"i cpepek"vco dlē p"uap"dclqu0Cn'4242"ETCHO UC"gtc"wpc"fg"rcu"r qecu"go r t guc" f g"r kl cu"htlcf cu"r ctc"re"lpf wutk"cwqo qvtk " {"c's wg"gu"re"Àplec"s wg"ewgpc"eqp"wpc"r t gpuc"fg" 6222"vpgmcf cu⁶⁶"Ukp"go dcti q."mqu"glgewkxqu"uqukpgp"s wg"gn'pkxgn'f g"lpxgtuk"p"fgo ² ukeq" pq"hwg"gn'uwhekgpv"gp"rcu"Ànko cu"f² ecf cu" {"r qt"gp"fg"rcu"ecr cekf cf gu"vgepqn"i kecu"fg"rcu" cevkxf cf gu"fg"htlcf q"gp"qtqu"r c"ju"uwr gtcp"co r riko gpyg"cn'iqecni"fk gevqxqu"fg"ETCHO UC." gpyt gxkuc"r gtuqpcn"3: B 4245-0

Nc"tc{ gevqtk"fg"ETCHO UC"lplek"eqo q"r ctvg"fg"re"cwqo qvtk "KMC"gp"3; 79"ewcpf q" f lej c"eqo r c° "c"fg gekf g"lpxgtvk"gp"o cs wkpctk"fg"htlc"gp"E»tf qdc0Nwgi q."gp"3; ; 2"cdtgp"re" lftlec"gp"Ucp"Nwku." cr tqxgej cpf q" wpc"ng{"f g"r tqo qekp"lpf wutkcn' Gp"3; ; 4" gn'I twr q" I co guc.⁴⁶⁷ f g" Gur c° c."ng"eqo r t»"c" T gpcwn" *cpvgu" KMC+"rc" cwqr ctvkuc"ETCHO UC' Ukp" go dcti q."gp"4224"gn'i twr q"gur c° qn'f gekf g"vgtō kpc"eqp"uwu"pgi qekqu"gp"gn'ugevt"cwqo qvtk " gp"Cti gpvkpc."Dtcukf{"Gur c° c⁶⁸"Cu"gp"4225"xgpf gp"ETCHO UC" c" wpc"crkcp| c"fg"fk gevqxqu" f g"rc" go r t guc"eqp"gn'I twr q"Vcwtwu."wpc"eqo r c° "c"fg"ecr kcrgu"pcekppcngu"fg"lecf c" c"rc" r tqf wekpp"fg"o cs wkpctk"xkcn'{"r ctc"re"lpf wutk"fg"re"o cf gtc0"

Gp"guv"2 r qec"ug"eqo gp| »"c"r tqf wek"r ctc"Vq{ qvc."c"r ctvk"fg"ri'o qf gm"J knw"KO X0Gp" r ctvwert."ETCHO UC"fg"ug° »"gn'r mppq"fg"htlc"{"fg"gucttmq»"gn'uqr qtvg"fg"ri'tgp"fg"mrvgtq"r ctc" VCUC" c"r gf kf q"fg"re"vgtō kpcn'Nqu"glgewkxqu"uqukpgp"s wg"gu"wpc"r kl c"fg"enc"eqo r nglk cf " {"hwg"uwo co gpyg"fg"kl'ekn'gn'f kug° q" {"fg"gucttmq"fg"re"o kuo c0Rqt"glgo r nq."gn'tguv"fg"rcu"r ken' wu"mxcpr"r kl cu"hwf kf cu" {"pq"htlcf cu."rcu"ewcngu"uap"o ^a u"ugpekrcu" {"fg"o gpqt"ecrk cf 0Gug" r tqf wevq"gu"Àpleq"gu"Uwf co ² tlec" {"ug"iq"eqp"wpw»"r tqxg{ gp"fg"Vq{ qvc"gp"mqu"c° qu'r quvgtkqtgu." uwhtkpgf q"uqm"eco dkqu"o gpqtgu0Cf go ^a u."gp"guv"gvrc"rc"r tqxggf qtc"hdtkedc" gpi tpcplgu" htclcf qu'r ctc"rcu"eclcu"fg"eco dkq"fg"Xqmuy ci gp" {"gtc"r tqxggf qtc"fg" T gpcwn" {"Hkx0"

⁴⁶⁵"Gp"r ctvwert."guv"go r t guc"tcdcl"eqp"cegtq"o letqrcgf q."ew{c"Àplec"r tqf wevtc"gp"Uwf co ² tlec"gu"re"dtcukgtc" I gtf cw0"

⁴⁶⁶"Qvc"cwqr ctvkuc"fg"r kl cu"htlcf cu."s wg"vco dlē p"gu"r tqxggf qtc"fg"Vq{ qvc."gu" T wdqn"cwps wg"guv"htō c"pq" vpgg"re"ecr cekf cf "fg"hdtkect"re"r kl c"fg"ETCHO UC."gn'uqr qtvg"fg"ri'tgp"fg"mrvgtq"fg"re"eco kqpgc."r qt"pq"r quggt" wpc"r t gpuc"fg"6222"vpgmcf cu0"

⁴⁶⁷"Gn'I twr q" I co guc"gtc"wpc"go r t guc"fg"qtki gp"gur c° qn'xcueq"eqpvtmcf c"r qt"fg"qu'i twr qu"go r t guctkngu"xcuequ" gn'i twr q"gn'extleq"klgtf tqre" {"gn'dceq"DDXC0Nwgi q."gn'I twr q" I co guc"ug"cuqek"eqp"qvc"htō c"xcuec."rc" Eqtr qteckp"O qpf tci qp"Eqqr gtcvxc."hqtō cpf q"Rtqo qcwq" c"plxgn'lpvgt pcekppcn'0C"o gf kf qu"fg"3; ; 2"rc"htō c" kpgtpcekppcn'ug"hectk »"gp"gn'itwdtq"fg"rcu"gpgti "cu"tgpqxcdngu0F guf g"4239"rc"go r t guc"ug"cuqek"eqp"rc"crigo cpc" Ugo gpu."hqtō cpf q"Ugo gpu" I co guc0"

⁴⁶⁸"Gp"Cti gpvkpc"r qug"rc"vco dlē p"rcu"go r t guc"0C vtlegt"rc" Cwutcn" I kecu."Eqekuc" {"uw"ucrk c" guwxq"vco dlē p" o qvxc" c"r qt"rc"etkukuf gn'ugevt"cwqo qvtq"cti gpvkpc" *Nc" P cekp."42 B 4224-0"

P q"qduwcpvg."gp"4235."cpvg"xctkqu"co qu"fg"fgukpxgtuk»p."uwo cf q"c"re"ecff c"fgn'ugevqt" cwqo qvqt"pcekqpcn"re" go r t guc"guwxq"cn'dqtf g"fg"re"s wkgdtc0C"r ctvkt"fg"wp"vtdclq"fg"re" o kpkmtc"pcekqpcn"fg"Kpf wmtk"fg"guq"o qo gpvq."F²dqtc"l kqti k"ug"gpqvt»"wp"pwgqxq"i twr q" kpxgtuqt"s wg"eqo r tg"{"tghqto wg"re"eqo r c° 0Cu"re"go r t guc"fg"Ucp"Nwku."Tqxgmc"Ecctcp| c." f gf kecf c"c"re"eqputweek»p."cf s wkgtg"re"vqwrkf cf "fg"ETCHO UC0D^a uleco gpvg."gn'i qdkgtpq" pcekqpcn"rg"r kf k»"c"re"go r t guc"eqputwevqt"eqo r tct"re"cwqr ctvkt"r ctc"o cpvgpgt"nqu'r wguvqu" fg"vtdclq"{"gn'know-how"fg"re"eqo r c° 0c."{"guc"ug"xlq"qdri cf c"cegr vct."f cf q"s wg"i tcp"r ctvg" fg"uw"pgi qekq"r tqxgp"fg"re"qdtc"r Àdriec"{"f gr gpf"fg"gn'i qdkgtpq"fg"ETCHO UC." gpvtgxkuc"r gtuqpcn"3: B 4245-0⁶⁹""

" Nqu"fg"ktgevxqu"fg"ETCHO UC"uqukpgp"s wg."gp"gn'4236."Xqmuy ci gp"{"Vq{qvc."nqu" Àplequ"erkgpvgu"s wg"rg"j cd"cp"s wgf cf q."ngu"o cpkhuvtqp"s wg"re"fg"ugkpewrt"cp"uk'pq"o glqtc dcp" re"r tqf wevkt cf "{'ewo r n'cp'eqp're'gpvtgi c'fg'r kg| cu0C"r ctvkt"fg"gmq."ug'hgx»"c'ecdq"wp'r tqeguq" fg"tgqti cpk cek»p"s wg"ko r rke»"gn'f gur kf q"fg"r gtuqpcn"{"re"o glqtc"fg"ecrk cf ."r tqeguqu"{" ugi wtk cf 0Gp"guv"Ànko q"r wpvq"gn'f gr ctvco gpvq"fg"Kpi gplgt"fg"Rtqeguqu"fg"VCUC"wxq"wp" tqnlhwpf co gpvcn"{"c"s wg"gpvkt"r gtuqpcn"re"r tqxggf qtc"r qt"o^a u"fg"wp"co q"r ctc"mgxct"cecdq" ecr cekcekqpgu" {"o glqtc"re" ghlekpeke"fg"re"r rcpv"fg"ETCHO UC." gpvtgxkuc" r gtuqpcn"3: B 4245-0'

" C"tc"fg"guv"vtdclq"eqplwpvq"re"htc"r wf q"tgewr gtctug."o glqtc pf q"nqu'r tqeguqu"{" cwo gpvc pf q"re"r tqf week»p0C"lw'xgl."j c"nqi tcf q"tgeqo r qppt"gs wkr qu"fg"lpi gplgt"eqpvtcvpf q" lpi gplgtqu"junior"{"r qpk pf qmuc"vtdclct"eqp"nqu"senior"s wg"xgp"cp"fg"re"u"2 ecf cu"cpvgtkqt gu" gp"re"htc" c06: "Culo kuo q."j c"uwo cf q"pwgqxqu"erkgpvgu"eqo q"Uecpkc."Tgpvcw"{"Hqtf."cf go^a u"fg" go r t guc"fg"o cs wkpctk"ci t"eqnc06: "F g"vqf qu"o qf qu."nqu"glgewkxqu"uqukpgp"s wg"re"r guct"fg" j cdtug"tgewr gtcf q"fg"re"etkuku"uwtkf c"gp"4235/4236."cn'4244"re"go r t guc"vtdclcdc"r ctc" cncp| ct"r wpvqu"fg"gs wkrtdtk"{"nqu"o^a ti gpvq"fg"i cpcpek"uki wgp"ukgpf q"guccuqu"q"pwnqu." f gr gpf kpgf q"gn'c° q0'

" Gp"tguwo gp."guc"go r t guc"vco r eqq"wxq"vpc"vct{gevtk"vcp"uko krt"cn'tguvq"fg"re"u" cwqr ctvktcu"mqecrgu0Uw'x'pewm"lplekcn'eqp"Vq{qvc"rg"r gto kke"go r ngct"ecr celf cf gu"v² eplecu" eqo r nglcu"r ctc"fg"lug° ct"{"fg"gucttqmt"vpc"r kg| c"gur ge"re"ec's wg"vqf cx"ug"wkkt c"gp"re"J knw0Ukp" go dcti q."guc"tgrcek»p"pq"hg"cdtke"r wgtvcu"q"vtqu"pgi qekqu"eqp"vgo kpcrgu"mqecrgu"q"fg"gn'gz vgtkqt0'

⁴⁶⁹"Gn'f ktgevxq"ug° cnc"s wg"hwg"vpc"qr gtcekp"uko krt"re"s wg"lpgvvtqp"j cegt"eqp"re"cwqr ctvkt"Rctcp^a "O gvcn"{" re"eqo r tcf"gn' twr q"Kpf cmq."cwps wg"re"o kuo c'egt»"gp"42370'

⁴⁶"Nc"go r t guc"vkgp"wp"fg"gr ctvco gpvq"fg"lpi gplgt"fg"Rtqeguqu"{"qvtq"fg"o cxtleg"r"r gtq"pq"lpi gplgt"fg"Rtqf wevq0'

⁴⁶"Nqu"fg"ktgevxqu"ug° cncp"s wg"re"u"eqo r tcu"fg"Xqmuy ci gp" dclctqp"uki phtecvko gpvg"gp"nqu" Ànko qu"co qu." r tkpek cm gpvg"fg"gdq"q"c"s wg"re"r tqf week»p"fg"eclcu"fg"eco dlq"fg"getgek»hwgtvgo gpvg"fg"gdq"q"re"vcpulek»p"ecf c" xgl"o c{qt"re"u"xtgukpgu"cwqo^a vkecu0'

Gu'o ^a u. 're'cwqr ctvkw'cvtcxgu»'o Ànr ngu'r tqdngo cu'f wcpvg'ru'r tlo gtcu'f²ecf cu'f gn'uki nq." eco dlcpf q'f g'r tqr kvctku'gp'f kwpvcu'qecukapgu'f 'mgi cpf q'cndqtf g'f g'rc's wgdteOP q'qduwcpvg." nwi q'f g'rc'mgi cf c'f gn'pwgxq"i twr q"go r tguetkq. "c"vtx²u'f gn'lpqxwctco kgpvq'f gn'i qdkgtpq" pcekqpcnlf g'gug'o qo gpvq. 'rc'tgrcek»p"eqp"VCUC"u'f hmg'f gvto kpcpvg'r ctc'rc'tgeqputwek»p'f g' rc'eqo r c° 'p0'Gp"r ctvkw'wrt. "gn'vcdclq"gp"eqplwvq"gp"gn'o glqtc kgpvq'f g'ru'r tqeguqu'ng" r gto kx" c'rc'cwqr ctvkw'gpeqvtct'plxgrgu'f g'r tqf wvwxkf cf "uwr gkqtgu0C'tc" "f g'guvq. 'r wf q" xqrxg't'c'xgpf gtrg'c'pwgxqu'erkgpvu. "cwps wg'ru'glgewkxqu'uki wgp'ug° cncpf q'ru'eqo r nglkf cf gu' f g'uw'qr gtcek»p0'

5.4.3.6 - Mirgor

O kti qt" gu" wpc" go r tgu' f g" ecr kcrgu" mcegru" s wg" kplek»" uwu" qr gtcekqpgu" gp" 3; : 5" r tqf wvkwq'f'ukugo cu'f g'ckg'ceqpf lekqpcf q'r ctc'xgj 'f'wru'gp'rc'r tqxkpek'f g'Vkgttc'f gn'Hwgi q" c'r ctvt'f gnt²i ko gp'f g'r tqo qek»p'lpf wvwxkf'Gp"4243"eqpvcde"eqp"50722"go r nrcf qu."wpc'f'p'g" f g'o qpvc'f'g'twgf cu'gp"tquctkq'r ctc'I gpgtcnO qvqtu'f 'ekpek'r rcpvcu'lpf wvwxkf'gp'Vkgttc'f gn' Hwgi q." f qpf g" ug" hcdtkecdp" gs wkr qu" f g" erko cvk'cek»p" {" ukugo cu" f g" kphqto cek»p" {" gpv'gvgpko kgpvq" *infotainment+"r ctc"rc'lpf wvwxkf"cwqo qvtk. "r rcs wvwx"grgvt»plecu"r ctc"gn' ugevq't'cwqo qvt. "grgvt»plec'f g'eqpuwo q. "grgvtqf qo ²u'kequ"{"o »f wru'grgvt»plequ" *Hqtdgu." : B34243-072"Guw'hto c"gu" wpc"gzegr ek»p"gpvg'ru'cwqr ctvkw'cu'f g'ecr kcrgu" mcegru"r qt" hcdtlect'r tqf wvwx'f g'cnc'eqo r nglkf cf {"vpgt'f ko gpukqpgu'o c'qtgu'c'nt'guv'f g'ru'r tqxggf qtgu' f qo ²u'kequ0'

" Nqu'r tlo gtcu'erkgpvu'f g'O kti qt'hwgtq' Hkv'f 'Rgwi gqv'ewcpf q'guqu'eqphqto cdc'p'Ugxgn' {"guwcdp" dclq'gn'eqvtqn'f gn'I twr q"O cetk0'F wcpvg'ru'f²ecf cu'f g"3; : 2" {"3; ; 2"O kti qt"ng" xgpf k»"ukugo cu'f g'ckg'ceqpf lekqpcf q'c"Rgwi gqv."Hkv."Tgpcwv."I gpgtcnO qvqtu."O gtegf gu' Dgp| {"Xqmuy ci gp0C'uw'xgl. 'tgcrlk »"cuqekcekqpgu"eqp'rc'cwqr ctvkw'i mdcn'htcpeguc'Xcrgq0' Cf go ^a u."eqo r t»"rc'hto c"kv'gterko c."uw'r tlpek'cn'r tqxggf qtc'f g'kv'gterko dckf qtgu'f g'ecmqt." wvwx d'p'wvwx'c'gp'Vkgttc'f gn'Hwgi q0"

" Gp'ru'r tlo gtcu'f²ecf cu'f gn'4222"O kti qt"eqo gp| »"c" f kxgtuk'lectug"j cek'f kwpvcu" r tqf wvwx'grgvt»plequ" {"grgvtqf qo ²u'kequ0'Gp"4223" kplek»"rc' hcdtkecek»p'f g'vcdngtqu'r ctc" xgj 'f'wru'Xqmuy ci gp" {"gp"4226"eqo gp| »"c"r tqf wvwx'gs wkr qu'f g'ckg'ceqpf lekqpcf q'r ctc"

⁴⁷²"C"uw'xgl. "ug"gpwgpvtc"eqputw'gp'f q'wpc'pwgxc"r rcpvc"gp"Dctcf gtc."r tqxkpek'f g'Dwgpqu'Cl'gu."r ctc"rc" r tqf wek»p'f g'r lgl cu'gur gekrgu'f g'cr ctgek'rc'rc'lpf wvwxkf"cwqo qvtk 0'cf go ^a u."rc'hto c'ug"j c'f kxgtuk'lect'q" j cek'qvtu'ugevq'gu-T'gckl'f gucttqng'f g'ecpvcu'o kqtkwcu+."kppqxc»p"r tq'f g'v'f g'K'F'g'kpi gplgt'f'gr'v'w'ec." uqhy ctg" {" o ge^aplec+." Ci tqr gewctkq" *gzr qtwek»p" f g" r tqf wvwx' ci tqr gewctkq+." Nqi 'v'w'ec." F kwtldwek»p" *eqo gteck'cek»p" f g" r tqf wvwx' grgvt»plequ" {" Ugt'xlekqu" *ugt'xlekqu" r quv' xgpc" kpenw'gp'f q' ugi wtu'f g' f k'ur quk'xqu+0'

j qi ctgu'f g'ncu'o ctecu'NI " { "Y j ktr qqr0'Gp"4228"kpucn»"wpc'r rcpvc'f g'cto cf q'f g'twgf cu" { " eqnwo pcut'f g'f kgeek»p'r ctc'I gpgtcnO qvqtu'gp'Tquctkq.'r tqxlpek'f g'Ucpvc'Hg0Gp'422; 'O ki qt' eqo r t»" qtc" go r tgu" hwi wkp" hcdtkcpvg" f g' cktgu' ceqpf lekqpcf qu." Kpf wutk" Cwutcn' f g' Vgepqmi ¶c"K VGE+.'eqp'rc'ewcneqo gp| ctqp'c'r tqf wek'egnwrtgu'P qnk0Gp'rc'ugi wpf c'f²ecf c" f gn'4222"O ki qt"kpkek»"wo dk²p"rc'hcdtkceek»p'f g'vgrxkuqtgu'NI " { "Uco uwpi . 'eqo r wcf qtcu' F gm'egnwrtgu'Uco uwpi . 'ukugo cu'f g'cwfkq" { "wplcf gu'f g'F XF " { "Dnw'Tc { "Dgmqs.e.'4239-0

" Gp" gug" eqpvz vq. "O ki qt" ug" xlpew»" eqp" VCUC'0'Gp" r ctvwert. " gptg"4235" { "4236"rc" f kgeek»p'f g'Vq { qvc' Cti gpvpc'f gek k»'mceck ct'rc'tcf kq. 's wg'gtc'r tqf wek c'r qt'rc'b wmpcekqpcn' lcr qpguc" Rkppgt" gp" O cpcqu. " Dtcukn" { " f guf g' cni" gtc" ko r qt wcf c" cni' r c¶u" *F cplgn'J gttgtq. " gptgxkuc" r gtuqpcn" 3 19 4244-0' Cu¶" ug" ng" r tqr qpg" c" O ki qt" tgerk ct" gn' ukugo c" f g' gptgvpk kpvq" c" dqt f q" *infotainment+" { c" s wg. " cwps wg'pq' hcdtkcdc" gug' r tqf wevq. " gtc'rc" Àplec" hto c" mcecn' s wg' vgp¶c" gzr gkgeek" { " ecr cekf cf. " vpvq" gp"rc" kpf wutk" cwqo qvk " eqo q" gp"rc" r tqf week»p'f g'grgevt»plec0"

" F g'gug'o qf q. "O ki qt" r tguqp»" wpc'r tqr wguv" c" VCUC" { "2 uc'rc'grgx»" c" uw'ecuc" o cvtk " gp" Lcr »p. " rc" ewcn' mwi q" eqpxgpek" c" Rkppgt" f g" gptct" gp" wp" r tqeguq" f g' vcpuhgtgpek" vgepqn' iec0C" r ctvk" f g'gug" cewgtf q. " Rkppgt" eqpvk Àc" tgeklkpf q" wp" royalty" r qt" gn'wuq" f g'uw' vgepqmi ¶c" { " eqo r ctg' gn'r tqeguq' r tqf wekxq' s wg' vgp¶c" p' gp' Lcr »p" { " O cpcqu' r ctc' s wg' O ki qt" m" ko r ngo gpv' gp" Vkgttc" f gn' hwi q0Cu¶" ug" o qp»" rc" r tko gtc" r rcpvc' f g' ukugo c" f g' gptgvpk kpvq" c" dqt f q0Nwgi q. " Rkppgt" j k q" wpc' tgxkuk»p' v eplec. " wpc' cuguqt¶c" { " wpc' egt vkeek»p' f g'rc" r rcpvc. " { " gp" gn' c° q"4237. "rc" hf dtkec" gu" cr tqdcf c. " eqo gp| cpf q" eqp"rc" r tqf week»p' f g' ukugo cu' f g' gptgvpk kpvq" c" dqt f q" *Lqu² Cmpuq. " gptgxkuc" r gtuqpcn" 32 19 4244-0' Ugi Àp' F cplgn'J gttgtq. " r ctc" r qf gt' tgerk ct" guv' mceck cel»p' hwi' f gvto kpcpv' gn' xqno gp' f g' r tqf week»p' s wg' crecp | »" VCUC. " { c" s wg" c" r ctvk" f g' guq" òse puede atraer a cualquier proveedor de afuera en un joint-venture o un acuerdo de tecnología "" *F cplgn'J gttgtq. " gptgxkuc" r gtuqpcn" 3 19 4244-0'

" Rctc" Cnglcpf tq" Lcxkt" Xk | ctk" I gtgpv" Glgewkxq" f g' Kpxguki cel»p. " F gucttqm" g" Kppqxcel»p' f gn'I twr q" O ki qt" f guf g"4232. " gn' c° q"4237" hwi" wp" " año bisagra "" r ctc" O ki qt" f gdlf q" cni' kpekq" f gn' cewgtf q" eqp" Vq { qvc'0' Cu¶" gn' glgewkxq" uqukpg" s wg' gm" rgu" " *permitted cumplir el sueño de fabricar el infotainment y transformarse hacia una compañía innovadora que hizo crecer exponencialmente la variedad de negocios y el tamaño* " *O ki qt. "45 l: 4243-0'

" Nwgi q' f gn' kpekq" f g' guvcu' cevxxkf cf gu. " gn' gs wkr q' f g' kpi gpkg¶c" f g' O ki qt" go r gl »" wpq' f g' nqu' r tq { gevqu" o a u'uki phkecvkxqu" gp" nqu' r tqeguqu" f g' kppqxcel»p' f g'rc" eqo r c° ¶c. " gn' f gucttqm" r tqr kq' f g'rc' tcf kq' HCO ROUg' tvcw' f g' wp' f kur qukxq' etgcf q' r qt'rc' go r tguv' s wg' cvt cxgu»' f kmpvcu" gvr cu' j cuv" mgi ct" c" kpeqtr qtctm" gp"rc" Hkv' Vqtq. " xgi ¶ewu" r tqf wek q" gp" Dtcuk0' Guv" hwi"rc" r tko gtc' tcf kq' dcuf c" gp' gn' ukugo c' qr gtcvxxq' Cpf tqkf' f gucttqm' c' gp' Co² tlec' f gn' Uw' *O ki qt. "

451: 14243+0'Gu'f gekl. "O ki qt'ngx»"c"ecdq'r tqeguqu'f g"upgrading intersectorial."eqo gp| cpf q" eqp"rc'r tqf week»p" f g"wp"r ctv"eqo r nglc" c"r ctvt" f g"wp"cewgtf q" f g"vcpuhgtgpek"vgepq»i lec" eqp"wp"o wmpcekqpcn'nf gt"eqo q"Rkqpggt." {"funcional,"tgcrk| cpf q"hwpekqpgu" f g" f lug° q" {" f gucttqmj"r tqr kq" f g" guvqu"r tqf wevqu0' Cf go a u."Lqu²" Cmnpuq."EGQ" f g"O ki qt" f guf g"4238." uquvkgpg's wg"gp"gn'4244'ug"gpewgpcp" f gucttqmcpf q"qtqu'ukvgo cu'f g"gpvtgvgpko kgpvq" c"dqtf q" r ctc"qtvcu"vgtō kpcrgu"cwqo qvtegu0' C"uw'xgl. "O ki qt"ng"eqo gp| »"c"xgpf gt"qtqu"r tqf wevqu" grgev»plequ" c"Rgwi gqv' Cti gpvkc" {"Xqmq'Dtcukf0'

" Gp'r ctvewrt. 'rc' f kxkuk»p' f g'kppqxcel»p' f g'O ki qt'ug'hqto crk| »'gp'423; . 'ewcpf q'eqo r tc" rc" eqo r c° 'c' Hco ct" Hwgi vkc." f gf kecf c" c" rc" r tqf week»p" f g" crto cu." cwqguvgtgqu" {" eqo r wcf qtcu'r ctc'xgi 'pewqu0'73' C"vtx² u' f g"guvq. "O ki qt"o cte»'uw'kpvgek»p' f g'cf gpvtctug"eqp" hwgt| c"gp'rc'kpf wvkc"grgev»plec"cwqo qvtk 0'Cu'f"ug'etg»'gn'ugevqt' f g'kppqxcel»p'eqo q'vplf cf " f g'pgi qekq. 'kpvgi tcpf q'gn'a tgc' f g'kpi gplgt'c' f g"Rtqf wevq"eqp"rc' f g" f gucttqmj" g'kppqxcel»p" *O ki qt.'451: 14243+0' Cf go a u' f g'hqu'ukvgo cu' f g'gpvtgvgpko kgpvq" c"dqtf q."guv'ugevqt' f gucttqm" ukvgo cu' f g"internet of things" *Kv+ {"o qxkrf cf "gr'vtelec" *dkekvvcu" {"o qpqr cvkpgu'gr'vtekvu+ eqp' f lug° q"gzenvukxq' f g'rc'eqo r c° 'c' *Lqu²' Cmnpuq. "gpvtgxkvc"r gtuqpcn'321914244+0'

" Gu'f gekl. "O ki qt" gu"wp"ecuq" gur gekn' gpvtg"rcu" cwqr ctvkvu" mcegru" f g" Vq{ qvc0' Gp" r ctvewrt. "rc" hto c" vkgpg" o c{ qt" gpxgti cf vtc" s wg" gn' tguvq" f g"rcu" f qo ² ukvcu" *{ c" ugc" r qt" go r nglc qu." r nrcvqu" q" plxgrgu" f g" r tqf week»p+0' Cf go a u." O ki qt" {"c" hdtkecdc" r tqf wevqu" eqo r nglqu" *ukvgo cu' f g'ck'gu'ceqpf kekqpcf qu."grgev»plec' f g'eqpuwo q."grgevqf qo ² ukvcu+ {" {"c" r qug'c' "gvr g'kpvkc"gp'rc'kpf wvkc"cwqo qvtk "cpvqu' f g'uw'x'pewq"eqp"Vq{ qvc0'Uk" go dcti q."c" r guct' f g'gmj. 'rc' tgrcek»p'eqp'VCUC'uki pkle»'wp'ucnq'ko r qtvcpv'gp'rc'vte { gevqtc' f g'guv' hto c." r gto kxk pf qng'rc' r tqf week»p' f g'wp'pvwxq' dkgp'eqo r nglc' r ctvt" f g'wp"cewgtf q"vgepq»i leq"eqp" wp"o wmpcekqpcn'nf gt0' C"uw'xgl. "guv"uwvkwf »"ko r qtvekvpgu's wg"r tqxgp'cp"r tgxkco gpv" f guf g'Dtcukf0' f g'guv"o qf q."guv"gu'gn'Àpleq'ecuq' f g'vqf qu'rcu'r tqxggf qtgu' f g'VCUC" s wg'ngx»" c"ecdq'wp"r tqeguq' f g"upgrading funcional e intersectorial, pq'w»m'c"r ctvt" f gn'gucrcō kgpvq" c" rc" r tqf week»p" f g"pvwxqu' dkgpgu" o a u' eqo r nglqu."ukpq" s wg" vco dke'p" tgcrk| cpf q" gn' f lug° q" {" f gucttqmj"r tqr kq" f g" guvqu"r tqf wevqu0'"

473" Nwgi q. "gp" 4242" O ki qt" vco dke'p" eqo r t»" qvc" go r tguv" tcf kecf c" gp" Vkgttc" f gn' Hwgi q. "rc" guvcf qvplf gpug" Dtki j vuct. 'f gf kecf c' c'rc' hdtkecec»p' f g'egnwrctgu'NI {"Uco uwpi 0'

5.5 - Análisis agregado de las trayectorias de los proveedores autopartistas de TASA

5.5.1 - La gobernanza en la cadena de valor de Toyota Argentina

" Ego q"ug"j c"o gpekqpcf q"gp"gn'Ecr ¶w¶3."rc"gobernanza"gp"rc"EI X"f g"rc"l¶f wutlc" cwqo qvtk "gu'f kki kf c'r qt"gnr tqf wevqt *producer-driven+:"f gdlf q"c"s wg'hqu'cevxqu"gur ge¶hequ" s wg'gu' p'r qt'f gta u'f g'guv'kr q'f g'gobernanza uqp'r tpekr cm gpv'ru'ecr cek cf gu'r tqf wevxcu." ru'cnqu'tgs wgtko kpvqu'f g'ecr kcn'{"rc"K F 0'Ncu"go r t gucu's wg'i qdkgtpcp"ru'producer-driven" uwgpp" uwdeqptcvt" cni wpcu" hcugu" f g" rc" r tqf weekp." r gtq" tgvkppp" r ctc" u¶ rc" K F " {" rc" o cpwcewtcekp" *eqo r rlc+f gn'dkpp'hkpn"Rqt v"gv'cn"4236+0Uk"go dcti q."rc gobernanza"fg" VCUC"wo dk² p"ug"j c"f gucecf q"r qt"wpc"ugtkg"fg"grgo gpvqu'r ctvewrtgu"s wg"ug"f gvcncp" c" eqpvkpwcekp0'

" Gp"r tko gt"nwi ct."ug"r wfg g"o gpekqpc"rc"r ctvlekr cekp"cevxk"gp"gn'f gucttqm"fg"ru" r tqxggf qtgu"mecngu0'Guq"ug"j c"xluq" c"vtx² u'f g"wpc"ugtkg"fg"r tqi tco cu'{"cevxkf cf gu."vcngu" eqo q"gn'Supplier Production Tracking Team" *URVV+r ctc"rc"lpenwulp"fg"pwxqu'r tqxggf qtgu." rc"Cuqekcep"fg"Rtqxggf qtgu'f g'Vq{ qvc"Cti gpvpc" *CRVC+r ctc"htvcegt"rc"eqqr gtcekp"gp" rc"ecf gpc"fg"xcmq."{"f kxgtucu"cevxkf cf gu'f g'ecr cekcep"r ctc"eqrdqct"gp"ru'o glqtcu'fg"ru" cwqr ctvkuu0'Guq"lpxqnetco kpvq"j c"ukf q"fgucecf q"r tpekr cm gpv'r qt"ru'r tqxggf qtgu'fg" ecr kcnu"pcekpcngu"ew{ q"r tpekr cn'enkpv"gu"Vq{ qvc" *¶f wutlcu" I wfk" Guvgdcp"Eqtf gtq." Xgpvcno {"ETCHO UC+0'

" Cu¶" gucu"cevxkf cf gu"fg"ecr cekcep." tqcekp"fg"r gtuqpcn"e¶ewru"fg"ecrk cf." eqpxgtucekppgu" hqto cngu" g" kphqto cngu" {"f kxgtucu"tgwkpqpgu"i gpgtcp"wp" kpvteco dkq"fg" kphqto cekp"fgdlf q"c"s wg"cdtgp"gur cekqu"s wg"heckkcp"rc"etgcep"fg"tgf gu'fg"eqpvcequ"fg" kpvtecekppgu'r gtuqpcngu0'Guu'tgf gu'r cucp'hwi q."o gf kcpv'f hgtgpv'u'j gttco kpvcu."c"rc"guhgc" qti cpk cekpcn'cwo gpvcf q"rc"ektewncekp"fg"lphqto cekp"fg"vgo cu'eqo q'r tqegu'r tqf wevxcq." qti cpk cekp" {"i guk0'Nc"tgrecp"fg"Vq{ qvc"Cti gpvpc"eqp"uwu"r tpekr cngu'r tqxggf qtgu" dtkpf c" eqo r tqo kuq" {"eqphcp| c" dkf kgeekpcn" r gto kkgpf q" wp" o c{qt" kpvteco dkq"fg" kphqto cekp"fgdlf q"c"ru'ectcevt¶wkecu'fg'f wtcekp" {"eqpvkpwkf cf "s wg'vkgp"rc"tgrecp0'

" F g"guv"o qf q."qvc"ectcevt¶wkec"fkvkvkxc"fg"guv"gobernanza"gu"rc"i gpgtcep"fg" x¶ewru" c" rcti q" r rlc q." gp" r¶pgc" eqp" gn'kr q"fg" x¶ewru" s wg" gucdnggp" ru" vgo kpcngu" cwqo qvlegu"lcr qpgucu"eqp"uwu"r tqxggf qtgu"gp"vqf q"gn'o wpf q0 Gp" guv"ugpvk q."vqf cu"ru" cwqr ctvkuu" gpv'gxlucf cu" eqpvkpwctqp" uw" tgrecp" eqp" VCUC" f guf g" s wg" eqo gp| ctqp" c" r tqxggtngu'r ctvku0'Nc"Apkczegr ekp"gp"guv"cur gev'hwg'gn'ecu'fg'ETCHO UC0'Guu'hwg'wpc" ukwcep"r ctvewrt"gp"rc"ewcn"rc"cwqr ctvkuu" guwxq"cn'dqtf g"fg"rc"s wgdte" c"r ctvt"fg"rc" f gulpxgtulp" {"rc"o cn'cf o kpvtecep"fg"rc"go r t guc0"

Cuñ "rcu'tgrecqpgu'f g'rci q'r rc| q'ug'o cpwxkgtqp"gp"vqf qu'mu'ecuqu"{' 'mu'r tqxggf qtgu' p'q'uwhtkgtqp"co gpc| cu'f g'ugt'f gur rc| cf qu'r qt"qvtqu0Ugi Ap"gn'r tgu'k' gpv'g'f g'Xgpcnw . "guv'ug' f gdg'c'swg" "Toyota no toma decisiones con criterios financieros de corto plazo, sobre cosas que van a impactar en el largo plazo. Se puede perder un poco durante un tiempo. Ellos no quieren maximizar ganancias, quieren optimizar ganancias" 0Gñ'ecuq'bo a u'gzvgo q'f g'guv'vkr q' f g'x'pewu'iq' r' tgu'p»'Guv'gdc'p'Eqt'f gtq. "{' c's wg'rc'cwqr ct vku'c'f gekf k»'v'cdclct'lu'q'eq'p'erkp'v'gu' lcr qpgugu'f gdl'f q'c'uw'g'zr g'k'g'pek'g'z'k'qu'c'eqp'Vq{ qvc"{' 'h'cmk'c'eqp'qvtqu'erkp'v'gu'q'ee'kf gpvc'gu'0

Cf go a u. "rc" k'peqtr qtcek»p" q' gn' cwo gpv'q'f g" r tqf week»p" f g" rc" o c {qt" r ctv'g'f g" mu' r tqxggf qtgu'gpvtg'x'ku'cf qu'f gur rc| ctqp"r ctv'gu'ko r qtvcf cu"*Xgpcnw . "F cpc."I wk'k"Dquj qmw." Rq'ko gvcn'{" O ki qt+0⁷⁴"Nc"o c {qt'p'f g'gu'cu'k'peqtr qtcekqpgu'ug'f k'q'gpvt'g"4236"{"4237." {"ug' r tqf w'gtqp"gp'f'p'g'c'eqp'gn'ek'eq'c'ue'g'p'f gpv'g'f g'VCUC"gzr n'ec'f q'gp'gn'ecr'f'w'w'q'c'p'v'g't'k'q'0Gu'f gek'." c'r ctv'k'f gn'r rc'p'f g'gzr cpuk»p. "{' 'h'ek'k'cf q'r qt'gn'eco dk'f'g'o qf gn'c'rc"J k'wz": AI gp'gtcek»p." gn'uc'na'c'n'p'k'gn'f'g'h'cd't'ke'cek»p'f g"322022"wp'k'cf gu'gp"4238"{" 'mu't'g'k'p'v'gi t'qu'q'ht'gek'f qu'r qt'rc" r'g {"cwqr ct vku'c'0"

" Wp"ewctv'q"grgo gpv'q'f g"t'g'x'c'pek"gp"gn'v'k'q'f g"gobernanza"iq'eq'p'uk'w'f'g'gn'f'z'tt'gq' eq'p't'q'n'f'g'VCUC'lu'q'dt'g'lu'w'f' tqxggf qtgu'0Nc'bo c {qt'f' ctv'g'f g'rcu'go r t'guc'gpvt'g'x'ku'cf cu'f gu'ce'cp' gu'g'r v'p'v'q" {"cni w'p'cu't'go c'tec'p'rc'eqo r n'g'k'f'cf "f g"v'cdclct'gp"gu'cu'eq'p'f'lek'q'p'gu'0R'q't'g'l'go r n'q." ETCHOUC"r rc'p'v'g'c"rc" f'k'h'e'w'nc'f" f g" cwo gpv'ct" r t'g'ek'qu'eq'p"VCUC." n'q'ew'c'n'rgu'f'g'lc"dc'l'qu' o a ti gp'gu'f'g'i c'p'c'pek'0C'uw'x'g'l . 'f'guf'g'I wk'k'lu'qu'k'p'p's'wg'c'Vq{ qvc "le interesa la reducción de costos, pero por mejoras de la productividad, reducciones naturales, no forzadas". Cf go a u. "f'guf'g'O gvc'nc"t'go c'tec'p"s'wg'rc"gz'ki'g'pek"r'qt"r tqf w'v'k'k'f'cf " {"ec'rk'cf"r'qt"o qo gp'v'qu"gu' g'z'eg'ul'x'co gp'v'g'c'nc'0'Cu'ko kuo q."gu'v'g'eq'p't'q'n'r w'g'f'g'x'gt'ug"gp"rc"r t'q'r k'g'f'cf "f g"mu'o q'f'gu" {" o c't'k'eg'u's'wg'q'v'q'ti c"c'rcu'cwqr ct vku'cu."c'f'k'g't'g'pek'f'g'q'v'cu'v'g'to k'p'c'rgu'cw'qo q't'k'eg'u'0"

" Gp"ew'cp'v'q"c"rc"ugi w'p'f'c"en'uk'h'ec'ek»p'f g"gobernanza."t'g'c'rk'cf c"r'qt"i'g't'g'h'k" {"qvt'qu' *4227+."mu'v'k'q'f'g'2'uc"gp"rc"l'p'f'w'v't'k'c'cw'qo q'v't'k' "r w'g'f'gp"x'ct'k'ct'f'g'r'g'p'f'k'g'p'f'q'f'g'rc"t'g'rc'ek»p" v'g'to k'p'c'n'r tqxggf qt0Cuñ'c'r ctv'k'f'gn'c'p'a'rk'ku'f'g'rcu'q'peg'c'w'qr ct vku'cu'gpvt'g'x'ku'cf cu.'ug'erc'uk'h'ec' gu'v'g'v'k'q'f'g'x'p'ewu'eq'p"VCUC0Gp'd'c'ug'c'rcu'g'ng'o gpv'qu'f'gu'ce'cf'qu." {"'uki'w'k'g'p'f'q'gu'v'k'q'm'q'i'p'c' f'g"gobernanza,"ug'r w'g'f'g'u'qu'v'g'p'gt's'wg'Vq{ qvc'w'x'q't'g'u'v'k'q'f'g'x'p'ewu'eq'p'rcu'cwqr ct vku'cu' gpvt'g'x'ku'cf'cu.'s'wg'ug'r w'g'f'gp'erc'uk'h'ec'f'gn'uki'w'k'g'p'v'g'o q'f'q'0"

"

⁴⁷⁴"Gp"gn'ecuq'f'g"[" c| cnk'w'o dk'p'ug'f'gur rc| ctqp"ko r qt'v'ek'p'p'gu."r'gt'q"rc"go r t'guc'f'gek'f'k»'k'p'uc'c'm't'r'rc'p'vcu'gp' W'w'i'w'c" {"'R'ct'ei'w'c"{'.'r'qt'iq'v'cp'v'q.'ug'uki'w'k»'ko r qt'v'p'f'q'i'tcp'r'ct'v'g'f'g'rc'p'w'g'x'c'r' tqf week»p'0"

Tabla V-1 - Tipos de gobernanza de TASA con proveedores entrevistados

	Modular	Relacional	Cautiva
Complejidad de la información	Alta	Alta	Alta
Habilidad/necesidad para decodificar la información	Alta	Media	Alta
Capacidades de los proveedores	Alta	Alta	Baja
Nivel de coordinación y asimetría de poder	Medio-bajo	Medio	Medio-alta
Casos	Mirgor, Dana, Metalsa, Polimetal	Denso, Toyota Boshoku, Yazaki	Esteban Cordero, Industrias Guidi, Ventalum, y CRAFMSA

Hwgpvg<gndqtcekp'r tqr kc"gp"dcug"e"gpvtgxkrcu"e"r tqxggf qtgu"{'I gtghk"{'qvtqu"4227+0'

"

Gp"r tko gt"nwi ct."Vq{qvc"Cti gpvpc"guvcdngel»"wpc"gobernanza"modular eqp"cs wgrcu" r tqxggf qtgu"o a u'i tcpf gu'pq'lcr ppgucu."wrgu"eqo q'O kti qt."F cpc."O gvcnc"{'Rqiko gvcrl'Guvq"ug" f gdg" c" s wg" r" eqo r rglkf cf " f g" r" kphqto cek»p" kpvgtco dlcf c." uw" eqf kkecdkrf cf " {" rcu" ecr cekf cf gu" f g"mqu'r tqxggf qtgu"uqp"cnco"gp"guvqu"ecuqu0Cf go a u."gp"guvg"vkr q" f g"gobernanza ug"ppecti cp"r tqf wevqu"gur gekkecf qu"e"r tqxggf qtgu"cnco gpvg"eqo r gvpgvu."eqp"xgtucvkrkf cf " r ctchdtlect'f kwpqu'r tqf wevqu"{'eqp"wpc"ectvgtc'f g'enkpvgu"b gf kpcpo gpvg'f kxgtukkecf c0Guv" xctkfg cf 'f g'enkpvgu"{'r tqf wevqu'dtkpf c'e"mqu'r tqxggf qtgu"vpc"cwqppqo 'c'tgrvxc'tgur gevq'c'mqu" eqo r tcf qtgu"{'r qt'gpf g.'rcu'culo gv'cu'f g'r qf gt'gpvtg'co dqu"uqp'tgrvxc'co gpvg'tgf wekf cu0Guv" hwg"gr'ecuq'f g'O kti qt."F cpc."O gvcnc"{'Rqiko gvcrl'

"

Gp"ugi wpf q'hwi ct."VCUC"b cpwxq'wp"x'pewm"relacional eqp'rcu'ukvgo krcu'lcr ppgucu" F gpuq." Vq{qvc"Dquj qmw" {" [c| cnk0' Gp" guvg" vkr q" mqu" r tqxggf qtgu" vco dlz p" uqp" cnco gpvg" eqo r gvpgvu" {" gz kvg" wpc" cnc" eqo r rglkf cf " f g" rcu" vcpuceekppgu." r gtq." c" f hgt gpek" f g" r" modular." r" eqf kkecdkrf cf " f g"2 ucu" gu" dclc." r qt" m" s wg" gn'eqpqeko kpvq"v eksq" vkgp"wp"tqn' etwekrl0D a uleco gpvg.'gvcu'go r tgucl'r quggp'uwu'egpvtqu'f g'K F 'gp'gnhwi ct'f qpf g'Vq{qvc'tcf lec" gnf kug° q"{'f gucttqm'f g'wp"b qf grq'f g'xgj 'pewm'gur ge'heq0Gp'gr'ecuq'f g'rc"Vq{qvc'J kwz."guvg" r c'u"gu"Vckrpf c."{'rcu'ukvgo krcu'lcr ppgucu"vco dlz p"kpucrcp'uwu'egpvtqu'f g'kpxguki cek»p"gp" gug'r c'u0F g'guvg"b qf q."gn' twguq'f gnkpvgtco dlq'f g'kphqto cek»p'ug'f gur rgi c'cnf"{'hwgi q'guqu" r tqf wevqu"{'r tqeguqu"uqp'tgr rkecf qu"gp"qvtqu'egpvtqu'kpf wutkrqu."gp"guvg"ecuq."Cti gpvpc"{' Uwf a hkec0'

Gp"guvcu'ecf gpcu'ug'xgtkhe"vpc"o www'f gr gpf gpek"gpvtg'r tqxggf qt"{'eqo r tcf qt."{'rc" eqphkcp| c'gpvtg'rcu'r ctvqu'ug'xwrg'k'uwco gpvg'ko r qvcpv0Nc'pgegukf cf 'f g's wg'rc'kphqto cek»p" v eks'hw'c'gpvtg'r tqxggf qt"{'eqo r tcf qt"j ceg'f g'rc"r tqzko kf cf "uqekn'{'gur cekn'gpvtg'co dqu" ugc'wp'tgs wukq'f g'guvg"vkr q" f g"vcpuceekppgu0F cf c'vcl'eqphkcp| c"{'rc"o www'f gr gpf gpek."gn'

f gucttqm q'f g'ecf gpcu't g'cekg'pcng'u't g's w'kgt g'f g'b wej q'w'go r q. '{. 'r qt 'gp'f g. 'hqu'equu'qu'f g'eco d'ket
f g'r tqxggf qt leqo r tcf qt 'w'kpf gp'c'ugt 'cnqu'Guv'g'gu'gn'ecua'f g'hqu'x'p'ewu'qt'ki k'pct'kqu'gp'v'g'rcu'
uk'wgo k'rcu'l'cr p'p'gucu'{'Vq{ qv'f gu'f g'gn'r c'p'f'g'gt'ki gp'j cuv'uw'tcf kece'k'p'gz'v'g'p'gp'gn't'gu'q'
f gn'o w'pf q'0

Rqt'Amo q. "VCUC"o cpw'xq"wp'c" *gobernanza cautiva* "eqp'rc"o c{qt'f'f g'rcu'go r t'gucu'
cw'qr ct'w'rcu'f g'ecr k'cng'u'm'ecng'u'Guv'dcp'Et'f'gt'q. "k'p'w'w'lcu'I' w'k'k'X'gp'v'c'no"{'ETCHO UC0'
Gp' gu'v'g' v'k'q"m'u" h'w'lcu'f g' k'p'ht'o c'e'k'p' v'co d'l'p" u'qp" c'nc'o gp'v'g' eq'o r' m'gl'qu." r'gt'q" c's w'f' m'u'
r tqxggf qt gu'u'qp'r q'eq'eq'o r' g'v'gp'v'g'u. 'c'f' h'gt'g'pek'f' g'n'i'm'odular'0Gp'gu'v'g'v'k'q' m'u'eq'o r' t'cf' q't'gu'f' cp'
c'uwu'r tqxggf qt'gu'k'p'ust'we'k'q'p'gu'g'z'r'f'p'ek'cu'c'eg'tec'f'g's w'. "e»o q"{"ew'p'f'q'r' t'q'f'we'k"{'cf'go' a'u'
uw'gr'p'o q'p'k'q't'g'c't'm'u. 'r'qt' 'm' 's' w'g'rc'uk'w'ce'k'p'gu'f'g'w'pc'g'g'x'c'f'c'cul'o'g't'f'c'0Gp'ek'gt'v'qu'ec'ucu."m'u'
eq'o r' t'cf' q't'gu'k'p'x'k'g't'v'p't'g'ew'u'qu'gp'c'wo' gp'v'ct'rcu'ec'r'ce'k'f'cf'gu'f'g'h'qu'f' tqxggf qt'gu."eqp'gn'q'd'l'g'k'x'q'
f'g'o' g'l'q't'c't'rc'ec'k'f'cf' /r' t'g'ek'q'f'g'm'u'k'p'uw'o'qu."eq'o q'gu'gn'ec'ua'f'g'VCUC"eqp'm'u'r' tqxggf qt'gu'
m'ec'ng'u'0Gp'gu'cu't'g'f'gu."rcu'd'cl'cu'eq'o r' g'v'g'pek'cu'f'g'm'u'r' tqxggf qt'gu'j' c'eg'p's'w'g'ug'cp'cautivos" f'g'
m'u'i' t'c'p'f'gu'eq'o r' t'cf' q't'gu.'s'w'g'p'gu'f'g'v'gp'v'p'gn'r'q'f'gt"{'r'w'g'f'gp'w'p'k'v'g't'c'm'gp'v'g'o' q'f'k'k'ect'equ'qu'
{"r' t'g'ek'qu' uk'p"o c{qt'gu't'g'uk'v'g'pek'cu'0'F'g' v'q'f'qu"o' q'f'qu."rc"q'ti'c'p'k'c'e'k'p"{"rc"eq'q't'f'k'p'ce'k'p'
p'ge'guct'ku'r'c'tc'm'g'x'c't'c'ecd'q'rcu't'c'p'uce'ek'q'p'gu'gp'v'g'eq'o r' t'cf' q't'gu'{'r' tqxggf qt'gu'u'qp"cn'cu'0

Gp't'gu'wo' gp.'rc' *gobernanza* f'g'VCUC'ug'j' c'ect'ce'v'g't'k' c'f'q'r'qt' u'w'r'ct'v'ek'r'c'e'k'p'c'ev'k'c'gp'
gn'f' gucttqm q'f'g'r' tqxggf qt'gu' m'ec'ng'u."uw'k'p'v'g't'eco' d'k'q' h'w'k'f'q'f'g' k'p'ht'o'c'e'k'p'eqp'gn'qu."uw'
x'p'ewu'qu'f'g'rc'ti'q'r'rc|'q."r'gt'q'eqp'h'w'g't'g'gz'k'i'g'pek"{"eq'p't'q'n'f'g'm'u'o'kuo'qu'0C'f'go' a'u."h'qu'v'k'q'u'
f'g' *gobernanza* 's'w'g'j'c'g'u'v'c'd'r'g'ek'f'q'eqp'rcu'f'k'v'p'cu'cw'qr'ct'w'rcu'ug'f'k'k'f'k'g't'q'p'gp'p' *relacional*
eqp'uk'w'go' k'rcu'i' m'd'c'ng'u'l'cr'p'p'g'ugu."modular'eqp'cw'qr'ct'w'rcu'i' t'c'p'f'gu'p'q'l'cr'p'p'gucu'{'cautiva'
eqp'rc"o c{qt'f'f'g'rcu'r' tqxggf qt'gu'f'g'ec'r'k'c'ng'u'p'ce'k'p'c'ng'u'0

5.5.2 - Upgrading de autopartistas en la cadena de valor de Toyota Argentina

Gp'ew'p'v'q'c'h'qu'r' t'q'egu'qu'f'g' *upgrading* f'g'gu'cu'h'k't'o'cu.'m'u'o'kuo'qu'v'co' d'l'p'j' cp'gu'v'c'f'q'
uw'h'ek'gp'v'go' gp'v'g'f'gn'ko' k'c'f'qu'r'qt'gn'v'k'q'f'g'go' r' t'g'uc'0Gp'i'gp'g't'c'n'rcu'cw'qr'ct'w'rcu'f'g'ec'r'k'c'ng'u'
m'ec'ng'u'"*eqp'gz'egr'ek'p" f'g'O'k'ti'qt"{'R'q'r'ko'g'v'c'n'j'cp"o'c'p'k'h'gu'v'c'f'q's'w'g'rc'r' t'k'pek'r'c'n'io' g'l'q'tc's'w'g'
j'cp'm'g'x'c'f'q'c'ecd'q."c't'c'f'f'g'uw't'g're'k'p'eqp'VCUC."j'c'uk'f'q'f'g' *procesos*. Ecd'g'f'g'ux'ce'ct's'w'g'
f'gp'v'q'f'g'rcu'v'k'q'm'j'i'c'u'f'g' *upgrading* f'g'ucttqm'cf'cu'r'qt'I'g't'gh'k'{"q'v'q'u"*4227+."rc'f'g'r' t'q'egu'qu'
gu'rc"o' a'u'f'f'ek'i'f'g'c're'c'p'ct'0Gp'm'u'ec'ucu'gu'w'f'k'f'q'u'gu'q'j'c'u'w'ti'k'f'q'gp'o'c{qt'o'g'f'k'c'eq'o'q'
eq'p'uge'w'g'pek'f'g'rc'c'f'q'r'ek'p'f'gn'o' v'q'f'q'VRU."gn'ew'c'n'ng'u'j'c'r'g't'o'k'k'f'q'c'wo'gp'v'ct'm'u'p'k'x'g'gu'f'g'
r'q'f'we'k'k'f'c'f'g'uwu'r'rc'p'vcu'0V'co' d'l'p."c'w'p's'w'g'gp'o'gp'q't'o'g'f'k'c'."g'u'c'v'o' g'l'q'tc'ug'j'c'r' t'q'f'we'k'q'
r'qt'rc'k'p'eq't'r'qt'ce'k'p'f'g'o'c's'w'p'ct'k'p'w'g'x'c'gp'rcu'f'p'g'cu'f'g'r' t'q'f'we'k'p'0"

Rqt'grieqvtctkq.'gnitguvq'f'g'rcu'htkto cu'pq'ug'j cp'kpxqmetcf q'gp'guvqu'r tqeguqu'f'g'o glqtc" c"vtcx2'u'f'gn'VRU'Gp"gr'ecua'f'g'rcu'o wmkpcekqpcngu'ler qpgucu"*F gpuq."Vq{ qvc"Dquj qmw" { "[c| cnk±.r' qts wg" { c'm'vpp'cp'kpeqtr qtcf q. ".gp'gnitguvq'f'g'rcu'eqo r c° q'cu. r' qts wg'vkgpgp'pkxgrgu" f'g'ghelkpek"cnqu."tcdclcp"eqp"qvtqu'enkgpvgu" { "uw'xkpewrelep"eqp"VCUC"gu'o gpqu'gumgej c" swg"rc'f'g'rcu'rqecrgu"*F cpc."O gvcnc."O ki qt" { "Rqiko gvcnθ'Gp"guvcu'Ànko cu'wco dlē p'ug'j cp" mgxcf q'c'ecdq'upgrading de procesos, r'gtq'pq'r qt'rc'kpenwukp'f'gn'VRU.'ukpq'r qt'rc'eqo r tc'f'g" o cs wkpctk'o ° u'o qf gtpc."rc'kpenwukp'f'g'tqdqu" { "rc'cwqo cvk cekp'f'g'r tqeguqu."mq'ewcn'rgu" r gto kkl»'cwo gpvt'uw'r tqf wevckf cf 0'

" C'uw'xgl. r'ctc'eri wpcu'cwqr ct wku'rqecrgu.'gnix'pewmq'eqp"VCUC'rgu'r gto kkl»'xgpf gtrgu" c'qvtcu'vgo kpcrgu'0'Cu'hwg'gr'ecua'f'g'Xgpvcnw. 'kpf wutku'I wfk'k' { 'Gugdc'p'Eqt'f'gtq'0'cf go ° u." guc"Ànko c'wco dlē p'r wf q'ceegf gt'c'rc'gzt wcl»p'c"Vq{ qvc"Dtcukn"cwps wg"u»mq'r qt'eri wpu" c° qu0'

Wpq'f'g'mu'grgo gpvqu'egpvtcrgu's wg'j c'r gto kkl' q'tgerk' ct'o glqtcu'c'rcu'cwqr ct wku'gp" uw'tgrlek»p'eqp"VCUC"gu'rc'r tgxkukdkf cf "f'g'rcu'eqo r tcu'f'g'uw'enkgpv."f'gtkxc'f'c'f'g'mu" kpetgo gpvqu'r rpkhlec'f'qu" { "i tcf wrgu'f'g'rc" r tqf week»p'f'g'rc" vgo kpcn" gp" r'f'pgc" eqp" mu" r t'pek'ku'f'g'production smoothing'f'gn'VRU." { "f'g'uw'x'pewmq'c'rc'ti q'r m| q'0'c'nt'gur gevq.'rc'i tcp" o c { qt'c'f'g'rcu'go r tgucu'f'guvcep"guv'hcvtq."gr'ewcn'gu'c'Àp'o ° u'xcmq'cf q'gp'wp'o gtecf q'vcp" xqñ wleqo q'gr'cti gp'k'p'0'Gp'gr'ecua'f'g'o ° u'gz'vgo q.'Gugdc'p'Eqt'f'gtq'f'g'ekf k»'tcdclct'w»mq'eqp" enkgpvgu'ler qpgugu'f'gdk' q'c'guv'vgo c'0'Gp'r ct wewrt.'rcu'cwqr ct wku'ug° c'nc'p's wg.'r qt'wp'rc'f'q." rc" guvdk'f'cf" { "r t'gxkukdkf cf "f'g'mu'eqpvtcvqu"rgu"r gto kvg"r rpkhlect." { ".r qt"qvtq"rc'f'q." gr' kpetgo gpvq'i tcf wcn'mu'hcxqtgeg"cn'r qf gt"uwdk"uw'ecr cek'f'cf "f'g'r tqf week»p."r gtq'f'g'hqto c" guc'm'p'cf c." { c's wg.'uk'gr'cwo gpvq'f'g'rcu'eqo r tcu'ug'f'k'ct'c'ra' k'co gpvq.'rc'o c { qt'r ct'v'f'g'rcu' cwqr ct wku'p'q'r qf t'c'f'gerk' ct'rcu'kpxgtukqpgu'p'geguet'ku" { "mq' tct'rc'ecr cek'f'cf "f'g'r tqf week»p" f'g'rcu'pwgxcu»tf'gp'gu'0'cf go ° u.'gnixqno gp" { "r t'gxkukdkf cf "f'g'eqo r tcu'f'g'Vq{ qvc'rg'r gto kkl»" wco dlē p'c"F cpc'gur gekr'k' ctug'gp'gr'o gtecf q'f'g'rcu'r ken'wr u."f'glc'p'f'f'g'rc'f'q'qvtq'vkr'q'f'g' enkgpvgu'eqp'mu'ewcn'rgu'guvdc'g'peqvt'cp'f'q'f'kxgtucu'f'k'lewnc'f'gu0'

Nc" Àplec" gze'g'ek»p" uqdtg" guv" grgo gpvq' hcxqtc'drg' mq' r t'gug'pvc" [c| cnk'0' Rctc" guv" cwqr ct wku."f'lej q'kpetgo gpvq'i tcf wcn'f'g'r tqf week»p'f'k'lewnc"uw'hwpekqpc'k'gpvq'r qt'rcu" ectce'vgt'p'rcu'f'g'o cpq'f'g'qdtc'k'p'v'pukxc'f'g'rc"r tqf week»p'f'g'ecdrgu'0'Gu'v'q'drki c'go r t'gpf'gt" r tqeguqu'f'g'eqpvt'cek»p'f'g'r gtuqpcn's wg'uq" equvququ'r ctc'rc'htkto c'0' Cf go ° u."f'guf'g'rc" r tqxggf'qtc't'gucnc'p's wg'rc'dclc'i cpcpek'f'g'rc'r r'pvc'rqecr' { "rc'hcnc'f'g'kpxgtukp"gp'rc'htkto c" go r gqtc'p'f'lej c'ukwcek»p'0'

Ukp" go d'cti q." gp" rc" i tcp" o c { qt'c'f'g'rcu' r tqxggf'qt'cu' gr'cwo gpvq'i tcf wcn'f'g'rc" r tqf week»p'f'g'VCUC"j c'r gto kkl' q's wg'rcu'cwqr ct wku't'gerk'gp'rcu'kpxgtukqpgu'r ctc'o glqtc't"

re'r tqf wevklf cf " lq'kpetgo gpvct're'r tqf week»p0Gri'ecuq'o a u'tgr tgugpvcvklxq'f g"guvg'r tqeguq'mq" r tgugpvc"Kpf wutku'I wkl k's wg'tgcrk »"wpc"i tcp"kp'xgtul»p'r ctc"eqpwtvkt'uw'ugi wpf c'r ncpvc"gp" \ ^ tcvg.'r t»zlo c'c'rc'lf dtkec'f g"VCUC."{ 'cwo gp»'rc'ecp'vkl cf 'f g'r ctvqu'f 'r kg| cu'gp'iqu'xgj ¶ewqu" Vq{ qvc0' Gp" gn' ecuq" f g" Kpf wutku'I wkl k' {" F gpuq." cf go a u." guvcu" kp'xgtukppgu" ug" xkgtqp" r quklk'vkl cf cu'eqp'rc'qdv'gpe»p'f g'et² f kvqu"HQP F GCT"gp"4236"4237."cnli wcn's wg"Vq{ qvc0'

Rqt "Anko q."gp"cn' wpqu'ecuqu'ug"tgi kvctctqp"qvtqu'r tqeguqu'f g"upgrading."cwps wg" f g" hqto c'o a u'ckurcf c'{"r wpcu'0'Rqt"glgo r mq."r ctc"Xgpvcnw "gn'x'¶ewm"eqp"Vq{ qvc"mg"r gto kkl»" tgcrl ct'wp'upgrade de producto"{'c's wg'r cu»'f g'r tqf wekl'»mq'xgpvcpcu'c'r qf gt'hdctlect'guktdu" {"r qtvcgs wkr clgu0'Gp'r ct'vkwrt."guq'j cdkk»"s wg'ug'gur gekrkeg"gp'guvg"Anko q'r tqf wevq"{'r wgf c' r qulekq'pctug"eqo q"mff gt'f gn'o gtecf q"mecn0'Rqt"qvtq"mf q."ETCHO UC"tgcrl »"wp'upgrading funcional' cn'f gucttqmt'gn'uqr qtvg'f gn'v'gp'f g'ncpvtq'r ctc"VCUC"eqp'gn'rcp| co kpvq'f gn'KO X." cwps wg"rcu'eqo r rkecekp'p'f g"rc'hto c"gp"mq'u"co qu'r quvgt'kqt'gu'f hkwvctqp"uw'ecr celf cf "f g" f kug° q"g'kppqxcel»p0'cf go a u."Vq{ qvc"Dquj qmw'r wf q"mgxct"cedq'wp'mgx'g'upgrade funcional, cn'eqo gp| ct'eqp'cn' wpcu'ce'vklf cf gu'f g'f kug° q0'Cu'¶'f guf g'gn'4239"cdt»"wp'f gr ctvco gpvq'f g" O cpci go gp'v'f g"Rtq{ gevqu."gp'gn'ewcn'ug'tgcrk cp"ce'vklf cf gu'f g"kppqxcel»p'r ctc"cf cr vct'gn' r tqf wevq" c" uw' eqpvz'vq" mecn0' Rqt" glgo r mq." f gucttqm»" wp" ukvgo c" r ct'vkwrt" f g" ckt'gu' ceqpf k'k'p'cf qu'r ctc"culgp'qu."f cf cu'rcu'gur gek'k'cf cf gu'f g'mq'u'o gtecf qu'rc'v'p'qco g'k'ecp'qu0"

Gri'ecuq'f g'O ki qt "gu'gn'Ap'leq"gp'gn's wg'ug'j c'mgxc'f q"cedq'wp'upgrade intersectorial." {"c's wg'eqp"Vq{ qvc'eqo gp| »'c'hdctlect'ukvgo cu'f g'gpvt'g'v'p'ko kpvq'c'dqtf q.'c'r ct'vkl'f gn'cewgt'f q" f g'v'cp'v'gt'g'p'ek'v'gep'q»i kec'eqp'rc'hto c'lcr q'p'guc'Rk'q'p'g'g'0'Nwgi q."O ki qt "eqp'v'p'w»'f kug° cp'f q" {"r tqf wek'p'f q"gu'qu'ukvgo cu'r qt'uw'ew'p'vc."go r t'g'p'f k'p'f q"wp'upgrade funcional0'Guv'g'ecuq" eqo dlpc'mq'u'r tqeguqu'f g'upgrade o a u'cxcp| cf qu'gp'vt'g'rcu'cwqr ct'v'ku'cu'f g"VCUC"{'t'guc'nc'c'Ap" o a u'f cf q's wg'gu'rc'Ap'lec'r tq'x'g'g'f qtc'f g'ecr k'c'rgu'm'ec'rgu's wg'hdctlect'ukvgo cu'eqo r rglqu'gp'gn' r c'¶u0"

Uqdt'g' guvg" Anko q" r wpvq" mq'u" r tq'x'g'g'f qt'gu' uqu'k'p'p'p" s wg" rc' cwug'p'ek' f g' hw'p'ek'p'p'gu" cxcp| cf cu'f g'K F'f g"Vq{ qvc"gp'Cti gp'v'p'c'{"f g'wp'egp'vt'q'f g'K F'gur gek'crk' cf q'v'cp'v'q'gp'gn'r c'¶u" eqo q"c'p'k'gn't'gi k'p'cn'u'qp'rk' k'ce'k'p'p'gu'ko r qt'v'p'v'gu'c"rc"j qtc'f g'mgxct"cedq'ce'vklf cf gu'f g" k'p'p'q'xc'el»p0'Eqo q"eqp'vt'ce'ct'c'f g'guvg"cur gevq"ug"r wgf g"xt"e»o q"rcu'ukvgo kvcu'lcr q'p'guc'u" r ct'v'k'cr cp'eqp"Vq{ qvc'f gn'f kug° q"{'f gucttqmq'f g'rc'J k'wz"{'rc"UY 6"{'uwu'r ct'v'gu'gp"Vck'p'f k'c." {"nwgi q"gu'qu'r tqf wevqu"u'qp"tgr'nc'cf qu'gp"Cti gp'v'p'c."f gl'cp'f q"wp"o cti gp'g'uecuq"r ctc"guvcu" ce'vklf cf gu'gp"gn'r c'¶u0'Rqt"wp"mf q."guvq'f c"ew'p'vc'f gn't'qn'egp'vt'cn's wg'v'k'p'p'p' guvg'vkr q'f g" r tq'x'g'g'f qt'gu'i mq'd'c'rgu'lcr q'p'g'g'gu'gp'rc'et'g'ec'el»p"{'f gucttqmq'f g'iqu'x'gj ¶ewqu"Vq{ qvc."{'rcu'd'clcu" ecr celf cf gu's wg's wgf cp'r ctc'rcu'h'k'c'rgu'm'ec'rgu'f g'guvqu'ukvgo kvcu0'Rgtq."cf go a u."guvq'o ctec" wp'm'p' kg'r ctc'rcu'cwqr ct'v'ku'cu'm'ec'rgu"{'uwu'qr qt'w'p'k'f cf gu'f g'g'uec'rc'o k'p'v'q'gp'guvc'ecf g'p'c'f g"

xcmt. " { c " s w g " r u " r c t v g u " o " a u " e q o r n g l c u " { " e q u q u c u " f g " m u " x g j " f e w m u " u q p " f g v g t o k p c f c u " g p " c e w g t f q u " i m d c r g u " g p v t g " o w n k p c e k q p c r g u . " n g l q u " f g " e g p v t q u " u g o k k p f w u t k r g u " e q o q " C t i g p v k p c 0 G u v " g x k f g p e k " u g " e q p f l e g " e q p " q v t q u " t c d c l q u " s w g " f g u c e c p " s w g " r u " c e v k x k f c f g u " f g " K F " v k g p g p " w p " d c l q " i t c f q " f g " k p v g t p c e k q p c r k k c e k p . " { " u g " e q p e g p v t c p " r t k p e k r c m o g p v g " g p " m u " r c " f u g u " f g " q t k i g p " f g " r u " c w q o q v t l e g u " i m d c r g u " q " g p " q v t q u " r c " f u g u " f g u c t t q m f q u " * E c t t k p e c l g e w z " g v " c r f " 4 2 2 3 = O k m g t . " 3 ; ; 6 + " { " s w g " r u " c e v k x k f c f g u " k p v g t p c e k q p c r k k c f c u " o " a u " c n f " f g " g u q u " f g u k p q u " u w g r g p " u g t " c s w g n c u " x k p e w r f c u " c n f g u c t t q m f " f g " r t q f w e x q u " { " r c " f c r v e k e p " c " r u " e q p f l e k q p g u " t g i k a p c r g u " { " p c e k q p c r g u " * R c x i f f p g m " 4 2 3 4 + 0 ' }

P q " q d u x p v g . " c n i w p q u " r t q x g g f q t g u " u g o c r c p " r c " r q u k d k k f c f " f g " f g u c t t q m f " f g " r t q f w e x q u " r c t c " r c " J k w z " I c l q q " T c e k p i . " s w g . " c w p s w g " u w " x q n w o g p " g u " d c l q . " u w " f k u g o q " g u v " w d k e c f q " g p " C t i g p v k p c 0 R g t q . " j c u v c " g n " r g t " q f q " f g " g u w f k q " f g " g u v c " v g u k u . " g u q " p q " j c " k o r w u c f q " p w g x q u " r t q e g u q u " f g " u p g r a d i n g " f g " r t q x g g f q t g u " m e c r g u . " u c r k q " c n i w p c u " c e v k x k f c f g u " f g " r c " h k r c n f g " V q { q v c " D q u j q m w 0 " }

G p " t g u w o g p . " r c " o c { q t " r c t v g " f g " r u " c w q r c t v k u c u " f g " e c r k c r g u " m e c r g u " u g " j c p " x k u v " d g p g h e k f c u " r q t " r t q e g u q u " f g " u p g r a d i n g d e p r o c e s o s , r t k p e k r c m o g p v g " c " r c t v k " f g " r c " k p v t q f w e e k p " f g n " V R U " { " g p " o g p q t " o g f k f c " r q t " r c " f q r e k e p " f g " p w g x c " o c s w k p c t k c 0 C f g o " a u . " c n i w p q u " f g " g m q u " r w f k g t q p " c e e g f g t " c " q v t q u " e n k p v g u " m e c r g u " c " r c t v k " f g " u w " x " f e w m u " e q p " V C U C 0 R g t q " g n " g r g o g p v q " s w g " r c " i t e p " o c { q t " f c " f g " m u " r t q x g g f q t g u " f g u c e c " e q o q " r t k p e k r c n " d g p g h e k q " g u " r c " r t g x k u d k k f c f " s w g " d t k p f c p " m u " c w o g p v q u " i t c f w c r g u " { " u q u v g p k f q u " g p " r c " r t q f w e e k p " f g " x g j " f e w m u " f g " V q { q v c 0 G u q " r u " r g t o k g " r r c p g c t " r c " q t i c p k k c e k e p " f g " r c " r t q f w e e k p . " r u " l p x g t u k q p p g u " { " c p k o c t u g " c " c o r r k c t " u w u " e c r c e k f c f g u " r t q f w e v x c u " c p v g " r c " k p e g t v k f w o d t g " s w g " r c " o c e t q e q p q o " f c " c t i g p v k p c " r g u " r t g u g p v c " e q p v k p w c o g p v g 0 U k p " g o d c t i q . " g p " t g r e k e p " e q p " q v t q u " r t q e g u q u " f g " u p g r a d i n g f g " m u " r t q x g g f q t g u . " r u " o g l q t c u " u q p " r w p w c r g u " { " g u e c u c u 0 G p " r c t v k e w r c t . " r c " w d k e c e k e p " f g n l e g p v t q " f g " K F " f g " r c " V q { q v c " J k w z " g p " V e k r p f k c " { " m u " e q p v t c v u " i m d c r g u " e q p " m u " u k u n g o k u c u " l c r q p g u g u . " s w g " v c o d k e p " t c f l e c p " u w u " e g p v t q u " g p " g u g " r c " f u . " o c t e c p " i f f o k g u " t " f k f q u " r c t c " r u " c w q r c t v k u c u " m e c r g u " { " u w u " q r q t w p k f c f g u " f g " g u e c r c o k e p v q " g p " g u v c " e c f g p c " f g " x c m t 0 ' }

Conclusiones parciales

" G p " m u " e c r " f e w m u " r t g e g f g p v g u " u g " j c " f g u c t t q m f q " e w " n " h w g " g n " t g e q t t k f q " f g " V q { q v c " g p " C t i g p v k p c " g p " r u " A n k o c u " f 2 e c f c u " { " r u " e c w u c u " f g " 2 u v g 0 C u " f " u g " j c " o c t e c f q " r c " g z e g r e k q p c r k f c f " f g " g u v c " h k t o c " g p " w p c " u g t k g " f g " f k o g p u k q p p g u " { " u g " j c " g z r i k e c f q " u w " e s t r a t e g i a e m p r e s a r i a l " c " r c t v k " f g " u w " i n c r u s t a c i o n i n t e r n a c i o n a l " { " n a c i o n a l . C u " f " c " r c t v k " f g " m " g z r w g u v " j c u v c " g u v c " u g e e k e p " f g " r c " v g u k u . " s w g f c d c p " r q t " t g u r q p f g t " c n i w p c u " r t g i w p c u " r c t c " r q f g t " c p c r k k c t " g z j c w u k x c o g p v g " s w 2 " }

hqtoc"vqo »'r'tgrcek»p'f g"VCUC"eqp"rcu"gor t gucu'wlecf cu"öci wcu'cttkdcö"gp'uw'ecf gpc'f g' xcmqt0"

F g"guvg"o qf q."gp"gn'r t gupvg"ecr ¶wru"ug"j c'r qf kf q'f kwekf ct's wg"c'r ct vkt'f gn'4234"gn' eqghlekpgv'f g'r ct vgu"ko r qtvcf cu"uqdtg"xgj ¶ewru'r tqf wekf qu'j c'kf q"dclcpf q"uquvpgkf co gpvg." f cpf q"ewgpw'f g'wp'r tqeguq'f g'o c{qt"eqpvpgkf q"mqecnf'gp"uwu"xgj ¶ewru'0Guc"vgpf gpek"vpgg" eqttgrvq"eqp"gn'o c{qt"etgelo kpgvq"gp"rc"r tqf week»p"{"rcu"gzr qt vcekpgu'f g'rc"htoc"gp"rc" ugi wpf c'f²ecf c'f gn'uki mq0Ukp"go dcti q.'wpc'i tcp'r ctvg'f g'rcu'cwqr ct vgu"ko r qtvcf cu"uqp'f g'cnc" eqo r nglkcf.'r tqxlpkpgf q'f g'Vekrpf kc"hub"o wpf knrf g'rc"J kwz+.f g'Dtcuki"O gtequw+{.'ecf c" xgl "o gpqu."f g'Lcr »p"ecuc"o ctk +0'Nc"ko r qt vcek»p'f g"guvqu"ukvgo cu"*r tkpek cmo gpvg"mq" o qvtgu"{"eclcu'f g'eco dkq+ug'f guvcec'r qts wg'uqp'f g'cnc"eqo r nglkcf "v'epkcc"{'r qt"mq'vcpvq." r quggp"o c{qt'xcmqt'ci tgi cf q's wg'qvtcu'}

Cf go ^a u."ug"j c"xkruq"s wg"VCUC"co r nk»"hwgtvgo gpvg"uw'dcug"f g'r tqxggf qtgu'mqecrgu' f guf g'uw'kwvrccek»p"gp"gn'r c¶u0Gp"guvg"ugpvkf q."vco dkp"ug"eqttqdt»"s wg"rc"o c{qt¶c'f g"mq" r tqxggf qtgu'f g'Vq{qv"tcf lecf qu"gp"Cti gpvpc"uqp'f g'ecr krcgu'pcekqpcrgu0Ukp"go dcti q."c" r guct'f g'gmq."vco dkp"ug"qdugtx»"s wg"rc"i tcp"o c{qt¶c'f g"guvqu"ug'f gf lecp"cevxkf cf gu'o ^a u" uko r ngu."vrgu"eqo q'rc'hdtlecek»p"{'r tqxkuk»p'f g'r ct vgu"o gv'rcu"{'r n'vkecu0Cf go ^a u."o wej cu' f g'guvqu'cwqr ct vgu'r quggp"xgpvlecu'ht gpvg"rcu"ko r qtvcf cu'r qt'ugt'r kgl cu'bulky."rcu'ewvrgu'uqp" f k¶ekrgu"{"equvqucu'f g'tcpur qt vct0Nc"gzegr ek»p"gp"guvg"eqplwpvq"mq"r t gupvc"O ki qt."{c"s wg" hcdtlec'r ct vgu'f g'o c{qt"eqo r nglkcf "v'epkcc0Rqt"Amko q."mq'qvtqu'v'gu'r tqxggf qtgu'f g'ukvgo cu' f g'o c{qt'xcmqt'uqp"cwqr ct vku'cu'i mqdcrgu'lcr qpgucu.'f qu'f g'gmcu'f gn'I twr q"Vq{qv0"}"

C"uw"xgl ."c"mq"rci q'f g"guvg"ecr ¶wru"ug"j c"xkruq"s wg"rc"gobernanza"f g"VCUC"ug"j c" ectcevgtk cf q'r qt'uw'r ct vlekrccek»p'cevxcc'gp"gnf gucttqm'f g'r tqxggf qtgu'mqecrgu.'uw'kwvgteco dkq" hmkf q'f g'kphqto cek»p'eqp'gmqu.'uwu'x¶ewru'f g'rci q'r n| q.'r gtq'eqp'hwgtv'gzki gpek"{"eqpvqn' f g'mq"o kuo qu0Cf go ^a u."mq'vr qu'f g"gobernanza"s wg"j c"guvcdngelq'eqp"mq'f kwpvqu'i twr qu' f g'cwqr ct vku'cu'ug'f kxkf kgtq"gp"relacional"eqp"ukvgo krcu'i mqdcrgu'lcr qpgugu."modular eqp" cwqr ct vku'cu'i tcpf gu'pq"lcr qpgucu"{"cautiva"eqp"rc"o c{qt¶c'f g"mq"r tqxggf qtgu'f g'ecr krcgu' pcekqpcrgu'}

Ukp"go dcti q.'wpc'f g'rcu'r tgi wpcu'hwpc co gpvrgu'f g'guv'v'guku'ug'egpvc'gp'ucdgt'f g's w² " hqtoc"gn'cwo gpvq'f g'rc"r tqf week»p."rcu"gzr qt vcekpgu"{"gn'eqpvpgkf q"mqecnf'g'mq"xgj ¶ewru'f g" VCUC"tgf wpf »"gp"o glqtgu'ecr cekf cf gu'v'epkccu'f g'rcu'cwqr ct vku'cu'xkpwrcf cu'eqp"gm0Cn' t gur gevq."rc"rkgtcwtc"o ctec"s wg"mq"x¶ewru'f g'f gucttqm' gpv'g"vgo kpcrgu"{"r tqxggf qtgu' mqecrgu'ug'dcucp"gp"rc"eqndqtcek»p"rc"rci q'r n| q"gpv'g'rcu'hkrcrgu'gz v'cplgtcu"{"rcu"go r t gucu' pcekqpcrgu" s wg" hcxqtgpgp"rc" v'cputgt gpek" f g" v'epqmqi ¶c" {"eqpqeko kpgvqu' f g"rcu' hkrcrgu' gz v'cplgtcu."hqo gpvcpf q'rc"o glqtc'f g'rcu"go r t gucu'pcekqpcrgu0C"rc"lpxgtuc."rc"tgf week»p'f g"

equuqu'c"eqtvq'r n| q" {"'rcu'tgncckqpgu'dcucf cu"gp"mqu'r tgekqu"gpvtg'rcu'hkdcngu'gz vtcplgtcu" {"'rcu'
go r t gucu'pcekqpcrgu'et gcp'x'pewqu'f gr gpf kpvgu.'r gtr gwcpf q'rc'f gr gpf gpek'f g'rcu'go r t gucu'
{'rcu'tgi kppgu'j cek'rcu'ci gpvqu'gz vtpqu'*Rcxifpigm"423: =f gwpi '('Eqg."4237+0"

Cu'f"gp"guv'ecua'ug"j c'r qf kf q'xgt's wg'rc'o c {qt'r ctvg'f g'rcu'cwqr ct vku'f g'ecr kcrngu'
mccrgu'ug"j cp"xkuv'dgpghekef cu'r qt'r tqeguqu'f g"*upgrading de procesos*, r tkpek cm gpyg"c"
r ctvt" f g'rc"lptqf weekp" f gn'VRU" {"gp"ugi wpf q"ni ct"r qt"rc"lpeqr qtcekp" f g"o cs vlpctk"
o qf gtpc0Cf go^a u."cri wpu'f g'gmqu'r wf kgtq"ceegf gt"cqvtqu'enkpvgu'mccrgu'c"r ctvt" f g"uw"
x'pewu"eqp"VCUC0Rgtq"gn'grgo gpvq's wg'rc"i tcp"o c {qt'f' f g'mqu'r tqxggf qtgu'f guvcec"eqo q"
r tkpek cridgpghekeq'gu'rc'r tgxkukdkkf cf' f g'mqu'cwo gpvqu'i tcf wcrngu' {"uquvpkf qu'gp'rc'r tqf weekp"
f g"xgj 'pewu' f g' Vq {qvc0' Guq" rgu" r gto kg" r rpgct" rc" qti cpk cekp" f g"rc" r tqf weekp."rcu'
kpxgtukppgu" {"cpko ctug" c"co r rct"uwu"ecr cekf cf gu'r tqf wekcu"cpvg"rc"lpegt wf wo dtg" f g"rc"
o cetqgeppqo 'f'cti gpvpc0Ukp"go dci q."gp'tgncckp"eqp"qvtqu'r tqeguqu'f g"*upgrading* f g'mqu'
r tqxggf qtgu.'rcu'o glqtcu'up'r wpcrgu' {"gucucu0Gp'r ct vkwrt.'rc'wdecekp' f gn'egpvtq' f g'KF "
f g'rc"Vq {qvc"J kwz"gp"Vckrpf k" {"mqu'eqpvcqu'i mdcrgu'eqp"mqu'ukugo krcu"lcr qpgugu."s wg"
wco dkp'tcf lecp'uwu'egpvtqu'gp"guv'rc'f'u."o ctecp'f'p kgu't'f' kf qu'r ctc"cwqr ct vku'f g'ecr kcrngu' {"uwu'
qr qt wpkf cf gu'f g'gucrc'o kpvq'gp"guv'ecf gpc'f g'xcmt0F g'guv'o qf q."ug'r wgf g'eqpenkt's wg."
c"r guct" f gn'cwo gpvq's wg"VCUC" gzt gtko gpv" gp"uw'r tqf weekp."gzt qtcekppgu."go r rgg" {"
eqvvpkf q'mecn'gn'ghgev"spillover"uqdtg'rcu'ecr cekf cf gu'v² epkecu'f g'rcu'go r t gucu'f qo² wkecu'
j c'ukf q'o^a u'dkcp'gucuaq0"

CONCLUSIONES

Guc"vguku"r ctvk" f g"n"o qvxcclp" f g"o gfk" { "gpvpgf gt" gr' uqdtgucrkpvg" f gugo r g° q" r tqf wevq" { "eqo gteknf g"Vq{ qvc" Cti gpvpc" gp"wp"ugevt" eqp"i tcpf gu"r tqdrgo cu'gutwewtcrgu." gpvtg"mqu'ewcrgu"tgucncp"uw" f h'ek'eqo gtekn"n" f gr gpf gpek"eqo gtekn"eqp" Dtcukn"n" guecuc" eqo r ngo gpvtkgf cf "r tqf wevxc"gp"gn'O gtequw. "gn'dclq"eqpvpgf q"mecn" f g"mqu"xgj "pwmqu"q"n" hqto c" f g" xlpewrcclp" gpvtg" vgo kpcrgu" { "r tqxggf qtgu"mecn" f g" Cu" c" t" c" "guc" ukwccclp. "n" kpxguki celcp" ug" j" c" egpvtcf q" gp" gn'cp" ruku" f g" ru" ectcevt "mecu" { "mqu" hcevqt gu" s w" g" zr rkecp" n" qti cpk celcp" { "n" i gukcp" f g" n" ecf gpc" f g" xcmq" f g" n" h'kcn" cti gpvpc" f g" Vq{ qvc" O qvt" Eqtr qtcvqp" { "uw"o glqt" f gugo r g° q" gp" eqo r ctcecp" eqp" gn' g" uq" f g" ru" vgo kpcrgu" cwqo qvtkgu" tcf kecf cu" gp" gn' c" u" gpvtg" 4224" { "423; 0"

" F g" guc" hqto c. "gp" gn'f gucttqm" f g" guc" kpxguki celcp" ug" j" cp" cdqtf cf q" o Ankr ngu' vgo cu. " ukp" go dci q. "ru" r tkpkr crgu" eqpenmukppgu" h'kpcrgu" cr qt vcp" tghngz kppgu" gp" vgu" f kgeekppgu" <I+ uqdtg" n" gutcvgi k" go r tguetknf g" Vq{ qvc" Cti gpvpc" { "ru" eqpvtkdwekppgu" gp" n" f k' ewukp" vgo" tlec" uqdtg" n" ceekp" geqp" o k" c" f g" h'krcrgu" f g" GO u=2+ "uqdtg" gn'f gugo r g° q" geqp" o k" c" f g" n" go r tgu" { "uwu" ghgevu" gp" gpvtco cf q" r tqf wevq" mecn" { "3+ "r tqr wgu" r ctc" gn' tguv" f g" n" kpf wukc" cwqo qvtk" cti gpvpc" c" r ctvk" f gn' guwf kq" f g" ecuq" O Cu" c" eqpvkpcclp. "ug" f gur rgi cp" gucu" eqpenmukppgu" gp" mqu" f k' k' vqu" p' k' grgu. "c° cf k' p' q" p' w' xcu" r tgi w' vcu" f g" k' p' x' k' i celcp" s w" ug" r r' p' v' c' p" c" r ctvk" f g" m" f gucttqm" f q" gp" guc" v' guku" O

1 - La estrategia empresarial de Toyota Argentina y sus aportes en la discusión teórica sobre la acción económica de filiales de EMs

Gp" n" r t' g' u' p' v' g' u' k' u' l' u' g' j' c' f' g' u' c' t' t' q' m' f' q' e" o q' u' g' j' c' e' q' p' h' q' t' o' c' f' q' n' e' g' u' t' c' v' g' i' k' e' g' o' r' t' g' u' e' t' k' n' f' g' V' q' { q' v' c' C' t' i' g' p' v' p' c' s' w' g' n' g' f' k' q' u' w' u' v' g' p' v' q' c' u' w' g' z' k' q' u' q' f' g' u' g' o' r' g' o' q' O' R' c' t' v' g' f' g' g' u' v' u' h' c' e' v' t' g' u' f' g' x' k' p' p' g' f' g' u' w' i' n' c' r' u' s' t' a' c' i' o' n' i' n' t' e' r' n' a' c' i' o' n' a' l' g' p' n' e' g' u' t' w' e' w' t' c' o' w' n' k' p' c' e' k' q' p' c' n' f' g' V' q' { q' v' c' O' q' v' t' Eqtr qtcvqp" O' R' t' k' p' e' k' c' m' o' g' p' v' g. "n" f' g' e' k' u' k' p' f' g' n' e' c' u' c' o' c' v' t' k' f' g' c' u' k' i' p' c' t' r' g' c' C' t' i' g' p' v' p' c' g' n' t' q' n' f' g' r' t' q' f' w' e' v' q' t' c' f' g' n' e' n' i' w' r' J' k' w' z' n' g' r' g' t' o' k' k' e' k' p' u' g' t' v' c' t' u' g' g' p' w' p' l' e' j' q' f' g' o' g' t' e' c' f' q' g' p' g' z' r' c' p' u' k' p' g' p' v' q' f' c' n' t' g' i' k' e' p' { "o' g' p' q' u' u' g' p' u' k' d' r' g' c' n' q' u' x' c' k' x' g' p' p' u' g' e' q' p' o' k' e' q' u' f' g' g' u' v' u' r' c' u' g' u' O' C' u' k' o' k' u' o' q. "n" gur geknk celcp" r tqf wevxc" f g" Vq{ qvc" gp" Cti gpvpc" { "Dtcukn" h'w'g' w' p' c' p' q' x' g' f' c' f' g' p' g' n' b' q' o' g' p' v' q' f' g' u' w' k' o' r' n' g' o' g' p' v' c' e' k' p' { "f' g' h' k' p' e' w' p' h' c' e' v' t' r' t' k' p' e' k' c' n' g' p' g' n' f' g' u' c' t' t' q' m' r' q' u' v' t' k' q' t' O' C' f' g' o' a' u. "ru" ectcevt "mecu" f g" n' x' g' t' u' k' p' f' g' n' J' k' w' z' f' g' n' r' t' q' { g' e' v' q' K' O' X' h' w' g' t' q' p' f' g' v' g' t' o' k' p' c' p' v' u' r' c' t' c' f' g' u' r' n' c' t' c' n' q' u' x' g' j' "pwmqu" eqo gtekn" r' d' x' k' p' q' u' f' g' n' e' q' o' r' g' v' g' p' e' k' . " { "n" k' p' e' q' t' r' q' t' c' e' k' p' f' g' n' U' W' X' U' Y' 6' eqo r ctvkp" f q" n' o' k' u' o' c' r' n' c' h' q' t' o' c' r' t' q' f' w' e' v' x' c' n' g' r' g' t' o' k' k' e' c' r' e' c' p' | c' t' r' A' d' r' e' q' u' f' k' u' k' p' v' u' h' q' i' t' c' p' f' q' g' e' q' p' q' o' "p" u' f' g' g' u' e' c' n' o'

C'uw'xgl . 'r' tcf kecelep'f g'Vq{ qvc' Cti gpvpc' { 'gn'r tq{ gevq' KO X'ug'f gur ngi ctqp'gp'wpc' hucg' gp' r' ewcn' r' hto c' o wnpcekqpcn' ug' gpeqvtcdc' gp' r ngpc' gzc'puk'p' gp' o gtecf qu' go gti gpvgu'tcu'gn'guvpeco kgpvq'f g'mu'r c'f'ugu'o a u'f gucttqmf qu.'m'ewcn'ug'r tqhwf k > 'hwgi q' f g'rc'etkuku'f g'422: /422; 0Cf go a u.'Vq{ qvc'gucdc'f gucttqmpf q'wp'r tqeguq'f g'i mdcrl' cel'p'c' r ctvt' f gn'ewcn' kpvvcdc' dqtct' r'cu' f hgtgpekcu' pcekqpcrgu' f g' uuu' r tqeguqu' { " r tqf wevqu." dgpghlekpf q'rcu'kpxgtukqpgu'gp'rcu'r rpvcu'hwgtc'f g'Lcr >p0"

Cu'f' r'cu' hkr'rgu'uwf co gtecp'cu."uk'dk'p'pq'gtcp'egpvt'rgu'gp'v'to k'pqu'r tqf wev'xqu' { " eqo gtekr'gu'r ctc'r' o wnpcekqpcn' eqo q' m'hwgtq' qvt'qu'r c'f'ugu'cu'k' v'lequ. u'f'hwgtq'p' o gtecf qu' f k'p' a lequ' { "gp'et'gelo kgpvq'f wcp'v'rcu'r tko gtcu'f'2 ecf cu'f gn'uki m. 'm'ewcn'vco dk'p'k'pek' k' gp' r' k'pxgtuk'p' f g'rc' hto c' gp'rc' tgi k'p'OCuko kuo q. 'gp'guvqu'Anko qu'f gegpkqu'VO E'c'recp| >. 'lwpvq' c'Xqmuy ci gp. 'gn'rkf gtc| i q'cwqo qvt'k' "gp'v'f q' gn'o w'f q. "f gp'q'cp'f q'wp'et'gelo kgpvq'f g'rc' eqo r c' ° 'c'p'k'gn'i mdcrl'0"

Cf go a u.'gn'r tq{ gevq'k'pek'nf g'Vq{ qvc' Cti gpvpc' eqo r tgp'f k' f guf g'gn'eqo k'gp| q'wp' r r'p'c'rc'ti q'r m| q. 'r ctvg'ectcevt'f'w'ec'f g'rc'gutcvgi k'eqtr qtc'v'xc'i mdcrl'f g'Vq{ qvc'0Gp'gn'lecuq' cti gpv'p'q. 'guvq'uki p'k'le>> r t'pek' c'mo gp'v'g'r r'p'v'gct'rc'uwv'gp'v'cd'k'k'f cf "eqo gtekr'nf g'rc' r' r'p'v'c'gp' dcug'c'rc'g'zr qt'v'ek'p' { "rc'k'pek'r qt'v'ek'p'f g'eq'v'p'k'f q'm'ec'n'gp'mu'x'gj 'f'w'qu'r tqf we'f qu'gp'gn' r c'f'U'Gm'ig'r gto k'k'c' VCUC'eq'v'ct'eq'p'mu'f >>rc't'gu'p'ge'guct'ku'r ctc'r'ko r qt'v'ek'p'f g'r ct'v'gu' { 'r k'g| cu. 'f cf qu'mu'j k'v'v't'lequ'r tq'd'igo cu'f g'f'2 h'ek'/'eqo gtekr'nf gn'ugev'qt'0Gu'qu'cur gev'qu't'gh'g'lp' r ct'v'g'f gn'r cr gn's w'g'rc'uwdu'k'k'ct'k'c'ti gpv'pc'ewo r r'k' >gp'rc'gut'wewtc'o wnpcekqpcn' { "e>> o q'rc' gutcvgi k'f g'VO E'ug'r r'cuo >>gp'rc'go r t'guc'm'ecrl'0"

U'p'go deti q. 'vco dk'p'ecd'g'o g'pek'q'p'ct's w'g.'c'r' guct'f g'g'v'g'eq'p'v'z'v'q'k'p'v'g't'p'cek'q'pcn'q'v't'q' f g'mu'r c'f'ugu'r tqf wev'qt'gu'f g'r k'eni'w' u'J k'w'z'f gn'r tq{ gevq' KO X.'Uw'f' h'k'ec. 'gn'ewcn'w'x'q'wp'r cr gn' ecuk'k'f'2 p'v'ek'c'n'cti gpv'p'q'gp'gn'r r'p'f g'rc'ecuc'o c'v'k'k' . 'p'q't'gu'w'v'v'v'c'p'g'z'k'x'qu'eqo q' u'f' m'hw'gp' Cti gpv'pc'0Gu'f gek'. 'rc' r' r'p'v'c'uwf ch'k'ec'p'c'ug'g'v'cd'ng'ek' >eqo q'w'pc'f g'r tqf wev'q't'c'f g'r k'eni'w' u' J k'w'z' { "UY '6'uki v'k'g'p'f q'mu'r'k'p'gco k'gp'v'qu'o ctecf qu'r qt'gn'hub'f g'r tqf we'ek'p'gp'V'ck'p'f k'c' { " eqp' w'p' r' r'p' dcuc'f q' gp' r' g'zr qt'v'ek'p' c' w'pc' t'gi k'p' eqp' w'pc' gut'wewtc' ge'q'p>>o k'ec' o c' { qt'k'ct'k'co gp'v'g'r t'ko c't'k'0P q'q'du'v'p'v'g. 'g'v'c' hto c'p'q'c'recp| >>'mu'uq'dt'guc'r'k'p'v'gu't'gu'w'ncf qu' r tqf wev'xqu.'eqo gtekr'gu'p'k'f g'eq'v'p'k'f q'm'ec'n's w'g'u'f' m'q' t>>VCUC'0"

F g'g'v'g'o q'f q.'gp'v'p'f k'gp'f q'c'rc'GO'eqo q'w'p'espacio social trasnacional eqp'f k'v'k'p'v'qu' i tw' qu'f kur w'cp'f q'rcu'l'gt'cts w'f'cu' { "gutcvgi k'cu'gp'uw'k'p'v'g't'k'q't. 'rcu'f k't'g'v'x'cu'f g'rc'ecuc'o c'v'k'k' 'p'q' r w'f'gp'x'gt'ug'f k't'g'v'co gp'v'g'ko r r'go gp'v'f cu'gp'rcu'uwdu'k'k'ct'k'cu. { "c's w'g'mu'g'l'g'ew'x'qu'm'ec'rgu' r qu'gg'p'w'pc'k'p'lt'g'p'ek't'g'n'x'cp'v'g'gp'rc'ce'ek'p'f g'rc'h'k'c'n'0Cu'f' r w'f q'x'gt'ug'e>>o q'rc'r tqf we'ek'p' f g' VCUC' ug' gu'v'pe>> gp'v'g' 4228' { "4232' c' r guct'f g'rcu' r g'tur g'v'x'cu' uq'dt'g' w'pc' o c' { qt' r q'v'p'ek'c'n'f cf " f g' et'gelo k'gp'v'q'0 Cf go a u.'rcu' g'zr qt'v'ek'q'p'gu' f g'rc' hto c' ug' eq'peg'v't'ct'q'p' "

hwgtvgo gpvg" gp" Dtcukn" cr tqxgej cpf q" gn' dgpghlekq" f gn' kpvgteco dlq" nkdg" f g" ctcpcegru." { "rc"
go r tgu" r gtf k" f gukqu" f g" gZR qt vcekp" f g" nqu" r tko gtqu" c° qu" f gn' 4222" s wg" eqo gp| ctqp" c" ugt"
cdcugekf qu" r qt" Vckrpf kc0"

Gn' eco dlq" gp" rc" f kgeekp" f g" rc" go r tgu" gp" 4232" i gpgt»" rcu" eqpf lekqpgu" r ctc" rc"
eqpwtweekp" f g" pwxcu" ecr celf cf gu" i gtgpekrgu" mecrnu" s wg" ng" ko r tko kgtqp" wp" pwxq" ko r wnuq"
gp" uw" t{ gevqtk" cuegp" gpv0UKdlgp" guv" eqo r qp" gpv" mecn' guwxq" cr q{ cf q" gp" rc" *incrustación
internacional*" { "rcu" eqpf lekqpgu" geqp»o lecu" o gpekqpcf cu" r tgxkco gpvg. "vco dk² p" ecdg" f guwect"
s wg" gucu" kpek vxcu" hwgtqp" hqto wrcf cu" f guf g" rc" hkn' mecn' Gu" f gek. "rc" ecuc" o ctk k' pq" ng" j cd" f"
cuki pcf q" pwxcu" kpxgtukqpgu" f g" tngxcpekc" c" rc" uwdukf kctk. "pq" r rcpgec" wp" cwo gpvq" gp" rc"
r tqf weekp" iki phek vxc" { "ng" j cd" f" r gto kfk q" c" Vckrpf kc" cdcugegt" c" i tcp" r ctvg" f g" nqu" o gtecf qu"
rc" kqco gtecpqu" c" nqu" s wg" Cti gpvkc" ng" j cd" f" gZR qt vcf q" r tgxkco gpv0" F g" guv" o qf q. "rc"
t{ gevqtk" r quvgtkq" pq" r wfg" g" ugt" Àpleco gpvg" gZR rdecf c" eqo q" r ctvg" f g" rc" *incrustación
internacional*" f g" rc" hkn' cti gpvkc. "f glcpf q" xgt" e»o q" grgo gpvqu" f g" rc" *incrustación nacional*"
lwi ctqp" wp" tqn' ko r qt vcpv" gp" rc" eqphqto cekp" f g" rc" gutcvgi kc" { "rc" qdvpekp" f g" nqu" t guwncf qu"
r quvgtkq" gu0" Guv" eqo r qp" gpv" mecn' hwg" wp" j cnc" i q" f g" rc" r tguv" v" vuku" { "pq" hqto cdc" r ctvg" f g"
rcu" j kr »vuku" f g" tcdclq" eqp" rcu" ewcrgu" ug" kpekctqp" guv" kpxgu" ki cekp. "s wg" ug" egpvtcdcp" gp" gn' tqn'
f g" rc" uwdukf kctk" gp" rc" qti cpk cekp" o wnkpekp" pcn" rc" gutwewt" { "rc" gxqwekp" f g" rc" geqpqo "f"
rc" kqco gtecp" { "nqu" vkr qu" f g" xgi "f wnu" r tqf wekf qu" r qt" VCUC0"

Cu" f" gucu" ecr celf cf gu" i gtgpekrgu" mecrnu" kpenw{ gtqp" <gn' pwxq" rnk gtc| i q" go r tgu" tken"
f g" F cpkn' J gttgtq. "rc" eqqr gtcekp" { "cr q{ q" eqp" gn' UO CVC. "rcu" r qn' kcu" r Àdrkecu" f g" r tqo qekp"
ugevqtkn" rc" tglpxgtukp" f g" rcu" i cpcpeku" { "rc" f kr nqo cek" eqo gtekn" r ctc" eqps wkrct" pwxqu"
o gtecf qu" f g" gZR qt vcekp0" F g" guv" hqto c. "rc" pwx" c" cf o kpkwtcekp" nqi t» t² eqtf u" s wg" uw" gtctqp"
tgi kwtqu" j kw»tkequ" f g" rc" kpf wwtk" cwqo qvtk k' cti gpvkc0"

Gp" r ct vewrct. "gn' eqo r tqo ku" { "eqqr gtcekp" eqp" gn' UO CVC" ug" hqt l»" eqp" rc" eqpf weekp"
f g" Tlectf q" Rki pcpgnk" nwi q" f g" hwgtv" gph' gpvco kpvqu" uqp" gn' ukp' kecq" gpv" g" 4225" { "42290"
Guqu" cewgtf qu" kpenw{ gtqp" rc" ko r qulekp" f gn' VRU" gpv" g" nqu" tcdclcf qt gu. "rc" o qf khekcekp" f g" nqu"
eqpxgpkqu" eqrgv" xqu" f g" tcdclq" { "rc" r ct vkr cekp" f gn' ukp' kecq" gp" rcu" pgi qekcekqpgu" eqp" rc" ecuc"
o ctk k' r ctc" rc" qdvpekp" f g" rcu" kpxgtukqpgu" f g" 4235/42370"

C" uw" xgl. "gp" guv" Ànko q" tgeqtkf q" ug" f guwectqp" rcu" f kwp" cu" hwgpv" u" f g" hpcpeko kpvq"
r ctc" rc" b" c { qt kpxgtukp" cwqo qvtk k' f g" rc" j kwqtk. "gpv" g" rcu" ewcrgu" guvcdcp" rcu" o kuo cu" i cpcpeku"
f g" rc" go r tgu. "dcpequ" mecrnu" g" kpvgt pcekqpcrgu" { "et² f kqu" guv" vrgu" c" vcucu" uwdukf kcf cu0" Gpvt" g"
guvqu" Ànko qu" ug" f guwecp" nqu" et² f kqu" HQP F GCT" s wg" hwgtqp" et wckrgu. "pq" uqm" r ctc" VCUC. "
ukp" vco dk² p" r ctc" f qu" f g" uwu" r tpek" crgu" cwqr ct vku. "F gpu" q" kpf wwtku" I wk k0"

Guqu" et² f kqu" r Àdrkecu" ug" uwo cp" c" vpc" ugtkg" f g" r qn' kcu" { "f kur qulekqpgu" kpwkwekqpcrgu"

s wg"Vq{ qvc" Cti gpvpc'wkk »"gp'gucuf² ecf cu0Guvqu'j cme| i qu'uqdtg'gn'cr q{ q'gucvnc'ic' hko c"
lcr qpguc"uqp"tgrxcpvqu'r ctc"guc"lpxguki cek»p" { c"s wg"o ckk cp"cri wpqu'f g"nu'gpwpekf qu'f g"
re"j kr »vguku'kpeken'f g"guc'vguku. "gp"re"ewen'ug"uquvpg" c"s wg"gn'f gucttqm'f g"VCUC"ug"f kq"f g"
hqtoc" kpf gr gpf kpvw"f g"rcu'r qn'kecu'r Àdreco0F g"guw"o qf q. "uk'dkpg"gn'Gucf q"cti gpvpp"pq"
f kki k»"gug'r tqeguq'f g'f gucttqm" { "gur geknk cek»p"gp"re'r tqf wek»p"f g'r keniw u'/pk'eqp"Vq{ qvc"
pk'eqp"gn't guq'f g"rcu'cwqo qv'legu'cti gpvpcu'/'u'f' dtkpf »"pwo gtququ'o gecpkuo qu'f g'cr q{ q"s wg"
r gto kkgtp"gn'f gur rkgi wg'f guetkr vq0Guvq"eqpvcuc'eqp"gn'ecuq'vc'kcpf² u'f qpf g"gn'Gucf q'f g"guq"
r c'u'rcp| »"wpc'r qn'kec'f g'or tqf weq"eco r g»p"pcekpcr'eqp"wpc'ugt'g'f g'kpegpvxqu'hkuecrgu" { "
eqo gtekrnu'r ctc"s wg"rcu'go r tgucu'cwqo qv'legu'ug"gur gekrkegp"gp"re'rcdt'kecek»p"f g'r keniw u0'
Rqt"gn'eqpvc'kq. "gp" Cti gpvpc. "gug'r tqeguq'guwxq"b c{ qto gpv'eqpf wek'q' r qt'gn'bo gtecf q. "eqp"
gn'r tqvc' qpkuo q'r kqpgt'f g"Vq{ qvc" Cti gpvpc. " { "gn'Gucf q"ceqo r c° »"gn'et geko kpvq'f g"guc"
go r t guc" { "f gn'ugevt'gp"uw'eqplwpv'eqp"rcu'f kkvpcu'bo gf kf cu'bo gpekqpcf cu0"

Rqt"Ànko q. 'ug'f gucec'gn'tcdclq'f g'f kr mqo cek'e'eqo gtekn'gp'hqu'r c'u'gu'rc'vqco gtecpqu"
nwgi q'f g"re"qdvpek»p"f g"re"lpxgtuk»p. "s wg"eqp»"eqp"gn'cev'kq'cf kekpcr'f gn'kf kqo c" { "gn'j wuq"
j qtctk'eqo r ct'kf q. "m"s wg"rg'r gto kkk" c"re" hko c"i cpctng'f lej qu'bo gtecf qu'c"Vq{ qvc"Vckrpf k"
{ "eqpetgvt'mu'cwo gpvqu'gp'hqu'plxgru'r tqf wekxqu" { "eqo gtekrnu0'

C"uw'xgl. "gp" guc"pwgxc" gvr c" f g" g'zr cpuk»p"vco dk² p"ug"f gpq»"s wg"gn'eqgh'ekgpv"f g"
r ct'vuko r qt'vc'cu'uqdtg'xgj 'f'wqu'r tqf wek'qu'j c'kf q'dclcpf q'uquv'pk'co gpv. "f c'pf q'ewgpw"f g"
wp'r tqeguq'f g"o c{ qt'eqv'gpk'q'mecr'gp"uwu'xgj 'f'wqu'0'Guc"v'pf gpek'v'kpg"eqttgrv'q"eqp"gn"
o c{ qt'et geko kpvq"gp"re'r tqf wek»p" { "rcu'g'zr qt'cekqpgu'f g"re" hko c"gp"re"ugi w'pf c'f² ecf c'f gn'
uki mq0Cu'f' "guc"lpeqtr qtcek»p"q"cwogpv'f g'r tqf wek»p"f g"re"o c{ qt'r ct'v'f g'hqu'r tqxggf qt'gu"
gpvt'gxkvc'f qu'f gur re| ctqp"r ct'vuko r qt'vc'cu' *Xgpcvno. "F cpc. "I w'kf k" Dquj qmw. "Rqiko gvcn" { "
O kti qt-0Nc"o c{ qt'r ct'v'f g'gucul'peqtr qtcekqpgu'ug'f kq'gpvt'g"4236" { "4237. " { "ug'r tqf wgtq"gp"
f'p'gc"eqp"gn'ugi w'pf q'ekn'c'uegpf gpv'f g"VCUC0'

Gp"v² to kpvqu'o ^a u'i gp'gtcrgu" { "v»t'kequ. "m" f gucttqm'f q"gp"re"vguku'r gto kg"t'ghz'kq'pct"
cegtec'f g"re"cek»p"geqp»o kec'f g'u'dukf kctku'f g"GO u'gp'r c'u'gu'r g'k'f' t'kequ0'Rqt"wp"rc'f q. "re"
gxkf gpek't'grx'cf c'r gto kg'xgt"rcu'f k'gt'gpeku's wg"gz'kuv'gpvt'g'rcu'f kkvpcu'hko cu. "kpenwq"gp"
wp"o kuo q'ugevt'geqp»o leq0F g"guw"o qf q. "m"xkuv'gp"guc"lpxguki cek»p"t'gchko c"re"kf gc'f g"
s wg" pq" r w'f g" r gpuctug" c" gucu" eqo r c° 'cu" eqo q" ci gpv'gu" j qo qi² pgqu. " w'pkctkqu. "
o czko k'cf qt'gu. "eqp"lphqto cek»p"eqo r r'vc" { "t'cekqpcr'cf 'r gthgevc0'

Gu'f gek. "s wg'guc'v'eqt'gu'up"gp't'gcr'f cf "qti c'pk'cekqpgu'eqo r r'glcu's wg."uk'dkpg'r w'f gp"
v'p'gt'q'dlg'v'xqu'f g"o czko k'cek»p"geqp»o kec. "² u'qu'pq'ug'f cp'f g'kf² p'v'ec'hqto c. " { "s wg."uk'dkpg"
r w'f gp"v'p'gt'ek'gt'v't'cekqpcr'cf "gp"re"d'Àus w'f c'f g'f lej qu'h'p'gu. "re"o kuo c"gu^a 'f grko kcf c'r qt"
uw'eqpv'gz'vq0Gp"r ct'v'ewrct. "re" g'ut'cvgi k'f g'rcu'uw'duk'kctku'f g"GO u'ug'r w'f g'gpv'gp'f gt'c'r ct'v'k"

f g"uw" *doble incrustación*, tghmgzkpcpf q"uqdtg"e»o q"guvcu"ht o cu"ug"kpugtvcp"gp"rcu"tgf gu"kpvt pcekqpcrgu" { "pcekqpcrgu"s wg"rcu"o qrf gcp0

Nc"eqtr qtckep"o wmkpcekqpcn'gu'pgeguctkco gpvg"wp"gur cekq"lgt^a ts wleq"f qo kpcf q"r qt"kpvt gugu"hpckepktqu"gp"rc"ugf g"egpvcn"r gtq"gn'gur cekq"kpvt pq"gp"u"gu"o w { "f kxgtuq" { "gu^a "uwlqv" c" f kucwukqpgu. "eqphkcvu" { "mej cu0'Nqu"npo kgu" f gn'gur cekq"kpvt pq"uqp"r gto gcdrgu="rcu" eqpgzkppgu" *q"rc"hcnc" f g"grcu+"gpvt g"nqu"cevqt gu"kpvt pq" { "nqu"cevqt gu" g"kpukwckppgu"gzvtpqu" gu"etwcknr ctc'eqo r tgpf gt'e»o q"guvg"gur cekq"tccupcekqpcn'igt^a ts wleq"gu'uwdxgtvkf q. f guchkf q" { "tgeqput vkf q0"

Gp"r ct kcwrt. "f wcpvg"guv"vguku"ug"j c"xkuv" s wg. "r qt"nq"o gpqu"r ctc"gn'ecuq" f g"Vq { qvc" O qvt "Eqtr qtckqp. "gzkuv"wp"hwgtv"eqo r gvpeke"gpvt g"rcu"hkckrgu" f g"rc"go r tguc. "eqo q"r wf q" xgtug"emtco gpvg"gpvt g"Cti gpvkpc" { "Vckrpf k"gp" guvg"ecuq0'Rgtq. "cf go^a u. "gzkuvp" wco dk² p" elgtqu"o^a ti gpgu" f g"ceek»p" f g"rcu"go r tgucu"uwlukf kctku"r ctc"r tqr qpvt" guvcgi kcu"cnvtpvxcu" s wg. "emtco gpvg. f gdgp"ugt"pgi qekf cu'eq"rc"ecuc"o ctk' r ctc"uwko r ngo gpvckep0'Guq"r gto kg" eqo r nglk ct'rc"ko ci gp"o qpq"nec" f g"rc"Go r tguc"O wmkpcekqpcn'eqo q"wp"cevqt"j qo qi² pgq"ewf q" Àpleq"egpvt q" f g" f geku»p"ug"wdlec"gp"rcu"qhckpcu"egpvt crgu0'F g"guvg"o qf q. "ugt"lc"kpvt gucpvg" eqpvkpwct" guvg"vr q" f g"cp^a rkuku"gp"r tqhwf kf cf "f g"GO u"gp"rc"lpf wutk"cwqo qvtk { "gp"qvtqu" ugevqtgu" geqp»o lequ" r ctc"j emt"rc" r ct kcwrtkf cf "q"pq" f gn'ecuq" Vq { qvc" gp" guvg"vr q" f g" qti cpk cekqpgu0

2 - El desempeño económico de la empresa y sus efectos en el entramado productivo local

Eqo q"ug"j c"o gpekqpcf q. "guv"vguku"ug"cnl" f g"nqu"ghqs wgu"vg»tlequ"s wg"r ncvp"u»nq" nqu"ghgevu"r qukkxqu"q"pgi cvkxqu" f g"rcu"GO u"gp"r c"jgu"r gth?tlequ" { "cf qr v"gn'uwv wguv" f g"s wg" gnko r cev"geqp»o leq" { "uqeknif g"guvcu"go r tgucu" f gr gpf f g"rc"nqto c"gp"s wg'²ucv"ug"tcf ks wgp" { "e»o q"ug"ct kcwgp"eqp"nqu"cevqt gu"necrgu. "gpvt g"nqu"ewcrgu"ug" f guvcc"gn'r cr gn'f gn'Guvcf q0⁴⁷⁵" F g"guvg"o qf q. "wp"r c"j" *integrado periféricamente* gp"rc"EI X" f g"rc"lpf wutk"cwqo qvtk "r wgf g" guecrt"uw'r qukek»p"gp"rc"ecf gpc"gp"rc"o gf kf c"s wg"mgxg" c"ecdq"cevkkf cf gu"o^a u'eqo r nglcu"gp"gn' r tqeguq" r tqf wvkvq" { " s wg" r wgf c" f gucttqmt" hto cu" r tqr kcu" s wg" ugcp" eqo r gvkkxcu" kpvt pcekqpcm gpvg. "cn'eqo q"nq"o wguvcp"nqu"ecuq" f g"Guvc" c. "Ecpf^a . "kpf k" { "Ej kpc0

Gp"gn'Ecrc"jwq"4" f g"guv"kpvguki cek»p"ug"cpck ctqp"eqo r ctcvxc"o gpvg"nqu" f gugo r g^o qu" f g"rcu" f kwpvcu"vgo kpcrgu"cwqo qvtlegu" f gpvcpf q"wp"eqo r qt wco kpvq" f hgt gpekcf q"gpvt g"grcu. " gp"gn'ewcn'ug" f guvcc"rc"vt { gevtk" f g" Vq { qvc" Cti gpvkpc0'Nqu"t guwvcf qu" f g" guvg"cp^a rkuku"

⁴⁷⁵"Cwps wg"gp"guvg"ecuq"guvg"hcvt"pq"j c { c"ukf q"vp" f gvto kpcpv. "eqo q"u"nq"hw"gp"Vckrpf k0

cttqlctqp'wp'rkf gtc| i q'f g'rc'hkto c'lcr qpguc'gp'mqu'pkxgrgu'r tqf wekxqu."rcu'xgpvcu."rc'r qulek»p" gp"rc"eAr wrc"geaq»o lec"cti gpvpc"{"uqdtg"vqf q."mqu"tguwncf qu"eqo gtekrngu"c"r ctvt"fg"uwu" gZR qtvekpqgu."cniq"eqpvqpkf q"mecn'f g'uwu'xgj 'fawqu"{"uwu'uwg gtcxkctkqu'ucrf qu"eqo gtekrngu' Guxqu" nji tqu" ug" f guwecp" f gdkf q" c" mqu" r tqdngo cu" gwtwewtcrngu" f gn' eqo r nglq" cwqo qvqt" xlpewrcf qu'c'uw'f² hkek'eqo gtekrn'{"cni'cniq'uwu'f g'cwqr ctvgu'ko r qtvcf cu."eqo q'vco dk²p."r qt'gn' eqpvz vq'f g'tgtceek»p'f g'rc'kpf wutkc'gpvtg'423: {"'423; 0F g'guyg'b qf q."ug'r wf q'eqo r tqdct's wg" gp"v²to kpqu'f g'r tqf wek»p" kpf wutkc'n" go r nqg." eqo gteq"gzvgtkqt" {"eqpvqpkf q"mecn'f g'mqu" xgj 'fawqu'gn'ucrf q'f g'rc'tcf kecek»p'f g'Vq{ qvc'gp'Cti gpvpc'hwg'r qukxq0Gp'r ctvewrc."gp'guxqu" Anko qu'cur gevqu'gn'ecuq'f g'Vq{ qvc'hwg'vpc'gzegr ek»p'gp'gn'ugevqt0F g'vqf qu"o qf qu."vco dk²p" ug'r qf t'f'c'r gpuct's wg'ulp'rc'gz'kugpek'f gn'eqo r nglq'f g'rcu'vgo kpcrgu'hqu't guwncf qu'eqo gtekrngu" j wdkgtcp'ukf q'f ghpkkxco gpvg'r gqtgu0

" Cu'f'gn'ecuq'f g'Vq{ qvc'hwg'emctco gpvg'uwg tkqt"cn'tguvq'f g'rcu'hkto cu."ukp"go deti q." cpcrk'ct"e" guw"eqo r c°'f'c'pq"uqm'uki p'khec"gzco kpct"õrc"gzegr ek»p"c"rc"tgi rcö."{c's wg"rc" gwtcvgi k'f g'Vq{ qvc'gp'Cti gpvpc"o qrf g»'gn'eco kpq"ugi wkf q"nwg' q'r qt'Hqtf."Xqmy ci gp." Pkuucp"{"T gpcwn'gp'rc'gur gekrk'cek»p'mecn'gp'r len'wr u'o gf kpcu'ew{ q'f gukq'r tkpek'cn'gu'rc" gZR qtvek»p'cn'tguvq'f g'Co² tlec'Ncvpc0F g'guyg'o qf q."r qf t'f'c'r gpuctug's wg'vco r qeq'gp'guyg' f gdcvgr qf t'f'c'p'eqpukf gtctug'mqu'ghgevqu'f g'rcu'vgo kpcrgu'cwqo qvtegu'gp'r c'f'gu'tgegr vqtgu'f g' hqto c" j qo qi²pgc." r quklrkcpf q" ghgevqu" f kxgtuqu" f gr gpf kqpf q" f g" rc'lu" gwtcvgi k'lu" ko r ngo gpvcf c'r qt'rc'lu'eqo r c°'f'c'lu0

Gp'ewcpvq'c'uw'xlpewrc»p'eqp'mqu'r tqxggf qtgu."ug'j c'r qf kf q'f kwekf ct's wg'c'r ctvt"fg'gn' 4234" gn' eqghkekpgv" f g" r ctvgu" ko r qtvcf cu" uqdtg" xgj 'fawqu" r tqf wek'qu" j c" kf q" dclcpf q" uquvqpkf co gpvg."f cpf q'ewgpvc'f g'wp'r tqeguq'f g'o c{qt'eqpvqpkf q'mecn'gp'uwu'xgj 'fawqu0Ukp" go deti q."vpc'i tcp'r ctvg'f g'rcu'cwqr ctvgu'ko r qtvcf cu'uqpf g'cnc'eqo r nglk cf ."r tqxkpkqpf q'f g' Vckrpf k'hub"o wpf knif g'rc'J knvz+"f g'Dtcukl*O gtequw+"{."ecf c'xgl"o gpqu."f g'Lcr »p"ecuc" o c'vk' +0Nc'ko r qtvek»p'f g'guxqu'ukvgo cu"*r tkpek'cm gpvg'mqu'o qvqtgu"{"rcu'eclcu'f g'eco dkq+" ug'f guwec'r qts wg'uqpf g'cnc'eqo r nglk cf 'v²eplec"{"r qt'm'vcpvq.'r quggp'o c{qt'xcnqt'ci tgi cf q" s wg'qvtcu0

Cf go^a u."ug'j c"xkuvq's wg"VCUC"co r nk»hwtvgo gpvg'uw'dcug'f g'r tqxggf qtgu'mecrgu" f guf g'uw'kpuwrc»p'gp'gn'r c'f'0Gp"guvg'ugpvkf q."vco dk²p"ug'eqttqdt»"s wg'rc"o c{qt'f'f g'mqu" r tqxggf qtgu'tcf kecf qu'gp'gn'r c'f'f g'Vq{ qvc'uqpf g'ecr kcrngu'pcekqpcrgu0Ukp"go deti q."c'r guct" f g'gmj."vco dk²p"ug'qdugtx»"s wg'rc'i tcp'b c{qt'f'f g'guxqu'ug'f gf kcep'c'cevskf cf gu'o^a u'uko r ngu." wrgu'eqo q'rc'hcdtkecek»p"{"r tqxkuk»p'f g'r ctvgu'o gv² nrecu"{"r n'wkecu0Cf go^a u."o wej cu'f g'gucv" cwqr ctvgu'r quggp'xgpvclcu'ht gpvg'c'rcu'ko r qtvcf cu'r qt'ugt'r kgl cu'bulky."rcu'ewrgu'uqpf k'f'f'krgu" {"equvqucu'f g'vcpur qtvt0Nc"gzegr ek»p'gp'guvg'eqplwpvq'm'r tguvgv"O ki qt."{c's wg'hcdtlec"

r ctvgu'eqo r nglcu."eqo q "mqu'ukugo cu" f g" gptvgvplk kpvq" c" dqt f q0' Cf go ^a u." guv "hko c" hvg" r"
 Àplec's wg" mxx»" c" ecdq" w" upgrading intersectorial y funcional." eqo gp| cpf q' eqp" r" r tqf week»p"
 f g" wpc" r ctvg' eqo r nglc" c" r ctvk" f g" w" cewgtf q' f g" tcpuhtgpekc" vgepqn» i kec' eqp" wpc" b" wmpcekpnci'
 rff" gt" eqo q" Rkqpggt." { "nvgi q" mxxcpf q" c" ecdq" r tqeguqu" f g" f kug^o q" { "f gucttqm" r tqr kq" f g" guvqu"
 r tqf wevqu0Uki wkpqf q" c" r" rktcwtc." guv" guecno kpvq" gu" wpc" f g" mqu" o ^a u" f kfkkgu" f g" mji tct." r qt"
 m" xpvq." guv" r ctvewrt" ecuq" tgxkug" gur gekn' kpvgt² u" { " r wgf g" ugt" o qvxxq" f g" hwwtcu"
 kpxguki cekppgu0' Rqt" Ànko q." mqu" qvtqu" vgu" r tqxggf qtgu" f g" ukugo cu" f g" o c { qt" xcmq" uqp"
 cwqr ctvkcu" i mdcrgu" lcr qpgucu." f qu" f g" gmcu" f gnI twr q" Vq { qv" *F gpuq" { "Vq { qv" Dquj qmw0"

C" uw' xgl . " ug" j c" xkuvq" s wg" r" gobernanza" f g" VCUC" ug" j c" ectcevtk cf q" r qt" uw'
 r ctvkr cel»p" cevkx" gp" gn' f gucttqm" f g" r tqxggf qtgu" mdecrgu." uw' kpvteco dkq" hmkf q" f g"
 kphqto cel»p" eqp" gmqu." uwa" x" pewqu" f g" rcti q" r rcl q." r gtq" eqp" hwtvg" gzi gpekc" { "eqpvtqnf g" mqu"
 o kuo qu0' Cf go ^a u." mqu" vkr qu" f g" gobernanza" s wg" j c" guvcdmgek f q" eqp" mqu" f kmpvqu" i twr qu" f g"
 cwqr ctvkcu" ug" f kxf kgtq" gp<"relacional" eqp" ukugo kvcu" i mdcrgu" lcr qpgugu." modular eqp"
 cwqr ctvkcu" i tepf gu" pq" lcr qpgugu" { "cautiva" eqp" r" o c { qt" c" f g" mqu" r tqxggf qtgu" f g" ecr kvcrgu"
 pcekpcrgu0'

Cu" f" wpc" f g" rcu" r tgi wpcu" hmpf co gpvcrgu" f g" guv" vgu" ug' egpvtcdc" gp" ucdgt" f g" s w² hqto c"
 gn' cwo gpvq" f g" r" r tqf week»p." rcu" gzi r tqvcekppgu" { "gn' eqpvkq q' mdecnf g" mqu" xgj p" ewqu" f g" VCUC"
 tgf wpf »" gp" o glqtgu" ecr cekf cf gu" v² epkecu" f g" rcu" cwqr ctvkcu" xkpwrcf cu" eqp" gmc0' Cn' t gur gevq."
 r" rktcwtc" o ctec" s wg" mqu" x" pewqu" f g" f gucttqm" gpvtg" vgt o kpcrgu" { " r tqxggf qtgu" mdecrgu" ug"
 dcucp" gp" r" eqrdqtcel»p" c" rcti q" r rcl q" gpvtg" rcu" hkkrgu" gztcpigtcu" { "rcu" go r tgucu" pcekpcrgu"
 s wg" hcxqtgegp" r" vcpuhtgpekc" f g" vgepqn i c" { " eqpqeko kpvqu" f g" rcu" hkkrgu" gztcpigtcu."
 hqo gpwpcf q" r" o glqtc" f g" rcu" go r tgucu" pcekpcrgu0' C" r" kpxgtuc." r" tgf week»p" f g" equvqu" c" eqtvq"
 r rcl q" { "rcu" tgmekppgu" dcucf cu" gp" mqu" r tgeku" gpvtg" rcu" hkkrgu" gztcpigtcu" { "rcu" go r tgucu"
 pcekpcrgu" etgcp" x" pewqu" f gr gpf kpvgu." r gtr gwpcf q" r" f gr gpf gpekc" f g" rcu" go r tgucu" { "rcu"
 tgi kppgu" j cek' mqu" ci gpygu" gztgtpqu" *Rcxn' pgm" 423: =I gwpi "('Eqg." 4237+0"

Cu" f" gp" guv" ecuq" ug" j c" r qf kf q" xgt" s wg" r" o c { qt" r ctvg" f g" rcu" cwqr ctvkcu" f g" ecr kvcrgu"
 mdecrgu" ug" j cp" xkuvq" dgpghkek f cu" r qt" r tqeguqu" f g" upgrading de procesos, r tkpek rno gpvg" c"
 r ctvk" f g" r" kpvtf week»p" f gn' VRU" { "gp" ugi wpf q" nvi ct" r qt" r" kpeqr qtcel»p" f g" o cs wpcctk"
 o qf gtpc0' Cf go ^a u." cni wpcu" f g" gmqu" r wf kgtq" ceegf gt" c" qvtqu" enepvqu" mdecrgu" c" r ctvk" f g" uw'
 x" pewqu" eqp" VCUC0' Rgtq" gn' gngp gpvq" s wg" r" i tcp" o c { qt" c" f g" mqu" r tqxggf qtgu" f guvcc" eqo q"
 r tkpek rni dgpghkek q' gu" r" r tgxkukdkkf cf" f g" mqu" cwo gpvqu" i tcf wvcrgu" { "uvvvpkf qu" gp" r" r tqf week»p"
 f g" xgj p" ewqu" f g" Vq { qv0' Guq" rgu" r gto kvg" r rpgct" r" qti cpk cel»p" f g" r" r tqf week»p." rcu"
 kpxgtukppgu" { "cpko ctug" c" co r rct" uwa" ecr cekf cf gu" r tqf wevkcu" cpvg" r" kpegt kf wo dtg" f g" r"

o cetqgeppqo ¶c"cti gpvpc0Ukp"go dcti q."gp'tgrcek»p"eqp"qvtqu'r tqeguqu'f g"upgrading f g"mqu" r tqxggf qtgu."rcu'o glqtcu'uaq'r wpcwrgu{"gucucu0"

Rqt"Ànko q."ecdg'f gucect"s wg"gp"v² to kpqu'vgepqn»i lequ'mqu"ko r cevu'f g"Vq{ qvc"gp"rc" geqpqo ¶c"cti gpvpc"uqp"dclqu."{ c"ugc"gp"rc"o kuo c"vto kpcn'eqo q"uwu'f gttco gu'j cekc"mqu" r tqxggf qtgu'Gu'f gek."uk'dlqp"rc"r rcpvc'f g"\` a tcvg"ug"gpewgpc"gp"¶pbc"eqp"rcu'r rcpvcu'f g" r tqf week»p'f g"Vq{ qvc"gp"vq q"gn'o wpf q."gn'f gucttqm"cw»evppq'f g" f kug° q."kpxguki cek»p"gp" kppqxcckppgu"gu'o w{ "cevcf q0Gri'egpvtq'f g" f kug° q" g"K F "f g"rc"Vq{ qvc"J kwz"ug"gpewgpc"gp" Vckrpf kc."f qpf g"gu³"rc"o c{ qt"r rcpvc"o cpwxcwtg"tc'f g"guv" xgi ¶ewu'f gn'o wpf q{"gn'Àpleq" egpvtq'f g"K F "s wg"Vq{ qvc"r qugg"gp"r c¶jgu"gp" f gucttqm" *gzeqr wcpf q"c"Ej kpc-0Gp"423; ." Vq{ qvc"Vckrpf kc"hdtk»"tgu"xgegu"o a u"wpkf cf gu'f g"J kwz"s wg"Cti gpvpc."m"ewcn'r gto kg" r gpuct"e»o q"gn'f kug° q{"rc"K F "gp"rc" kpf wutk"cwqo qvtk" r wgf g"guvct"tgrcekqpc'f c"rcu" geqpqo ¶cu'f g"guern'f g"mqu'o qf gmqu'f g'hu'xgi ¶ewu'f⁷⁶"

Guv' r gto kg'tghzqkpc"uqdtg'mqu'¶p kgu's wg"gm'ig"eqphk wtc"c"rc"r rcpvc'f g"\` a tcvg'f g" r qf gt'eqpegpvtct'guv'kr q'f g'cevckf cf gu'f "hwpekppgu."c'r guct'f g'ugt'gn'ugi wpf q'egpvtq'o wpf kn' f g'hdtklecek»p'f g"guv"o qf gm0C"uw'xgl ."rc"wdlecek»p'f gn'egpvtq'f g"K F "f g"rc"Vq{ qvc"J kwz"gp" Vckrpf kc" {"mqu'eqpvtcvu"i mdcrgu'eqp"rcu"ukngo kuvu"lcr qpgucu."s wg"wo dl²p"tcf kecp"uwu" egpvtqu'f g'kpxguki cek»p"gp"guv'r c¶j."o ctecp'¶p kgu't¶j kf qu'r ctc'rcu'cwqr ct'kuvu'mqecrgu'{"uwu" qr qtwpkf cf gu'f g"guern'o kppq"gp"guv"ecf gpc'f g'xcmq0F g"guv"o qf q."ug'r wgf g'eqpenwt"s wg." c"r guct'f gn'cwo gpvq"s wg"VCUC" gzt gtko gp»"gp"uw'r tqf week»p."gzt qtcekppgu."go r rgg{" " eqpvppk q'mqcn'gn'ghgev"spillover"uqdtg'rcu'ecr cekf cf gu'v² epkecu'f g'rcu'go r tgucu'f qo ² wkecu" j c"ukf q"o a u"dlqp"guccu0'Gu'f gek."rc"gzr gtlgpele"o a u"gzkquc"gp"rc" kpf wutk"cwqo qvtk" cti gpvpc'f g'rcu'Ànko cu'f² ecf cu'j c'f gttco cf q'dlcu'ecr cekf cf gu'vgepqn»i lecu'gp'gn'gpvtco cf q" mqcn'hu'ewcn'r gto kg'r gpuct's w²"s wgf c'r ctc'qvtcu'vto kpcrgu'eqp'r gqtgu'guwncf qu'r tqf wekxqu" {" eqo gtekrqu0' Guv" wo dl²p" f glc" xgt" mqu" r tqdrgo cu' f g" wp" r c¶j" cn' guvct" *integrado perifericamente*"c"rc"EI X"cwqo qvtk" {"rcu'f hkewncf gu'r ctc"r cuct" c"wpc"r qulek»p'f g" *semi-periferia*."

Cn'kpcn'f gn'r gt¶qf q"dclq"guwf kq"VCUC"eqo gp| »"c" f gur ngi ct"cevckf cf gu'f g" f kug° q" xkpcwrc'cu'c"rc"J kwz" I c| qq" Tcekpi {"cn'f gucttqm'f g'ugt'xkekqu'cuqekf qu'eqp'rc'r rcvchqto c'f g" o qxkrf cf "Mkpq0'Guvu'paxgf cf gu'eqphkt gp'r tqeguqu'f g"o c{ qt"ci tgi cek»p'f g'xcmq."cwps wg" c'Ap'uaq'kpekr kppgu'f "uw'f gucttqm" {"ghgev'f gdgtª p'ugt'tgvqo cf qu'gp'pwgxcu'kpxguki cekppgu0'

⁴⁷⁶"Ukp"go dcti q."rcu'pwgxcu'Hqtf "Tcpi gt"{"Xqmyy ci gp"Co ctqni'ncp' cf cu'gp"4245"»s wg"eqo r ctvg'r rcvchqto c" r tqf wekx"hwgtqp'f kug° cf cu'f "f gucttqm'f cu'r qt"gn'egpvtq'f g'kpi gpkg¶c'f g"Hqtf "Cwutckc."f qpf g"rc"htc'c"pq" r tqf weg" xgi ¶ewu'f guf g"4238."ewcpf q"gn'r c¶j vto kp»"eqp"rc"o cpwxcwtc"cwqo qvtk 0'F g"guv" hqto c."gung" eqpvtcug"gpvtg'gn'f kug° q'f g"rc"J kwz"gp"gn'ni ct'f g"o c{ qt'hdtklecek»p" {"f g"rc" Tcpi gt/Co ctqni'gp"wp"ukkl'ukp" o cpwxcwtc'f g' xgi ¶ewu'gu'wp'r tqdrgo c'f g'kpxguki cek»p'kpvgtgucpv'r ctc'hwu'qu'vtedclqu0"

3 - Propuestas para el resto de la industria automotriz argentina a partir del estudio de caso

Cwps wg" gzeqf g" mqu" rñb kgu" f g" guv" kpxguki cekp. "ug" eqpukf gtc" s wg" cni wpqu" f g" mqu" j cmc| i qu" f g" guv" vgu" r wgf gp" eqpvtkdwt" eqo q" kpuwo qu" gp" r" r rpkhcecep" { "r" gndqtccep" f g" r qnñkecu" r Àdrkecu" ugevtkcrngu0Gp" r tko gt" hwi ct. "gu" pgeguetkq" tgeqtf ct" s wg" Cti gpvkpc" gu" wp" r cñu" *integrado periféricamente* " c" r" EI X" cwqo qvtk " { "guq" eqpmgxc" wpc" ugtkg" f g" r tqdrgo cu" { " rko kcekppgu" ko r qtvcpygu. "eqo q" ug" j c" r qf kf q" xgt" c" m" rcti q" f g" r" vgu" 0Gpvtg" guvqu" pwf qu" ug" gpewgpvtcp<" r" gztcpplgtk cekp" f g" r" tco c" vgo kpcn" { " f g" r" r tqf weekp" f g" mqu" r tkpekr crgu" ukvgo cu" f gn'xgj ñewñ" of qo kpcf c" r qt" wp" r w" cf q" f g" go r tgucu" o wnkpekpccrgu" c" plxgn'ò wpf kn' . "r" gur gekrñk cekp" gp" r" u" cevkkf cf gu" eqp" o gpqt" xcmt" ci tgi cf q" f g" r" ecf gpc. "r" f gr gpf gpek" f g" vgepqmñ ñc" gztcpplgtc" { " r" u" f hlewncf gu" f g" r" u" go r tgucu" cwqr ct" vku" cu" mñecrgu" r ctc" eqo r gvt" kpgtpekpccm gpv0Guv" tqn" gp" gn'guegpctkq" kpgtpekpccn' pq" ng" r gto kg" cn' r cñu" eqpegpvtct" r" u" hwpekpccm" s wg" o " u" xcmt" ci tgi cp" gp" r" ecf gpc. " { . "uk' dkgp" gu" r qukdrg" r cuct" f g" wpc" ukwcekp" *periférica* " c" qvtc" *semi-periférica* eqo q" m" f go wguvc" r" gxlk gpek" j ku»tlec" kpgtpekpccn" vco dk' p" gu" ko r qtvcpy" ug" cmt" s wg" guqu" ecuqu" uqp" o kptkctkqu. " { " mqu" o " ti gpgu" f g" ceekp" r ctc" i gpgtct" gug" f gucttqmñ" uqp" gvtgej qu" gp" wp" o wpf q" eqp" hwgtvgu" cuko gvtñu" f g" r qf gt" { " cncu" dtgej cu" vgepqñi kecu" gpvtg" mqu" r cñu" f gn' Uwt" { " gn' P qtvg" I mñcñ' Guv" o cteq" j ku»tleq" { " eqpegp wcn'pq" r wgf g" f guv" gpf gtug" c" r" j" qtc" f g" r gpuct" r tqr wguv" r ctc" gn'ugevt0

Rctc" gn'ecuq" f g" Cti gpvkpc. "gp" guv" vgu" u" g" tgeqpvtw { »" r" vtc { gevtkc" j ku»tlec" f g" uw" kpf wutk" cwqo qvtk . " j cekppf q" 2 phcuki" gp" uwa" ectcevtñu" i gpgtcrnu" { " uwa" r tqdrgo cu" gutwewtcrnu" r ctc" f guv" cct" r" gzeqf ekpccñk cf " f g" Vq { qvc" Cti gpvkpc0Cuñ" u" f gucttqmñtqp" r" u" f kpkvcu" gvr cu" f g" r" kpf wutk" f guf g" uwa" kpekqu" gp" 3; 42" j cuv" r" etkuku" f g" r" eqpxgtvdkñk cf " ug" cñp" q" s wg" r" u" r tqdrgo " vkecu" f gn' cñep" f g" uwa" gzt vcekppgu" { " uwa" ucrf qu" eqo gtekrnu" { " c" ug" gpeqpvtcdcp" r t gupvgu" gp" guv" tgeqtkf q0Gp" r ctvewrct. "gp" r" f 2 ecf c" f g" 3; ; 2" ug" mñx»" c" ecdq" wpc" r tqhwf c" tgeqpxgtukp" f gn' eqo r nglq" s wg" r gto kx»" wpc" o glqtc" r tqf wvkkc" { " vgepqñi kec" { " i gpgt»" wpc" ucrf c" gzt vcf qtc" r ctc" r" tco c" vgo kpcn" c" r ctvt" f g" r" etgcekp" f gn' o gtecf q" tgi kpcñ' Ukp" go dñti q. " f wtvcpy" guv" gvr c" vco dk' p" ug" ci wf k »" gn' f 2 hlek' eqo gtekrñ" f g" r" kpf wutk. " xkpewrñf q" gp" i tcp" o gf kf c" cn' cwo gpvq" f g" r" u" ko r qtvclep" gu" f g" cwqr ctvgu" r ctc" r" r tqf weekp" f g" xgj ñewñ. " { " r" u" gzt vcekppgu" ug" eqpegpvtctqp" hwgtvgo gpv" gp" Dtcukñ" }

Nvgi q" f g" r" etkuku" f gn' hkp" f g" r" eqpxgtvdkñk cf " r" kpf wutk" cwqo qvtk " gzt gto gp»" wpc" hcu" f g" gzt cpukp" cwps wg" mqu" r tqdrgo cu" f gtxcf qu" f g" uw" dcñp| c" eqo gtekrñ" { " f gn' cñq" wuq" f g" kpuwo qu" ko r qtvcf qu" ug" o cpwxkgtqp0C" r ctvt" f g" r" cuwpek" f gn' i qdkgtpq" f g" Eco dkgo qu" c" hkpgu" f g" 4237. " gn' eqo r nglq" cwqo qvtq" uwtñk»" wp" hwgtv" t gvtqegu" f cf q" r qt" r" t gvtceekp" f g" uw"

r tqf weekp. 're'eqpwpkf cf 'f g'mqu'cnqu'pkxgrgu'f g'ko r qtcekppgu'f g'cwqr ctvgu'{'re'cr ctkekp' f g'grxcf qu'f² hleku'gp'rcu'r ctvk cu'f g'xgj 'fwmqu'vgo kpcf qu. 'm'ewnci tcx>'mqu'p'gi c'v'xqu'ucrf qu' eqo gtekrqu'f g're'kpf wutkc0'Uk'dk'gp'gn'f² hlek'eqo gtekn'f g'guv'tco c'guv³ r t'gugpv'gp'qvtqu' r c'f'gu. 'rcu'r ctvewctkf cf gu'f gn'eqo r rglq'cwqo qvt'cti gpv'kp'gp'guv'cur gev'tgucncp'r qt'uw' wco c^o q't'grv'xq'{'gn'r tqdrgo c'j kw>t'leq'f g're' 'restricci3n externa'cti gpv'kpc0'

" F g'guv'o qf q. 'gp'dcug'cn'ecuq'f g'Vq{qvc'gzr wguv'gp'guv'v'guku. "{'gp're'd'Àus wgf c'f g' r tqr lekt'wp'eqo r qt'wco k'gpv'f g'o c{qt'r tqf weekp. 'gzr qtcekppgu'{'o gpqt'f gr gpf gpek'f gn' o gtecf q'f g'Dtcukn'gp'gn'tguv'f g'rcu'cwqo qvt'lequ'eqp'ecr cekf cf 'kpuv'ncf c'gp're'Cti gpv'kpc. 're' r q'f'lec'r Àdrec'r wgf g'k'pegv'xct'mqu'hcevqtgu'gzr r'lec'v'xqu'f gn'f gugo r g^o q'f g'Vq{qvc'eqp'o c{qt' r tqdcdk'kf cf 'f g'ugt'gzv'cr q'rcdrgo0'

" Cu'f' wpq'f g'mqu'hcevqtgu'r tkpek'crgu'f g're' vtc{gevtk'f g'Vq{qvc's w'g'r wgf gp'ugt' tgr r'ec'drgu'gp'qvtqu'ecuqu'ug'gph'ec'gp're'gz'kuv'pek'f g'r r'v'chqto cu't'gi k'qpcrgu'gz'ewuk'cu. 'm' ewnc'r gto kg'rko kct're'eqo r g'v'pek'{'r tqo q'xgt're'eqo r rgo gpv'ctk'gf cf 'eqp'Dtcukn0'Eqo q'ug'j c' xkuv'gp're'k'px'guki cel>p. 're'g'ut'cv'gi k'f g'f w'r'ec'ek>p'f g'b qf grqu'gp'co dqu'r c'f'gu'f gn'O gtequw' j c'uk'q'r gtlw'lekn'r ctc'Cti gpv'kpc0'Gp'gug'ugv'kf q. 'ug'x'c'rt'c'r quk'x'co gpv's w'g're'ng{'f gn' T²i ko gp' f g' F gucttqm' {" Hqt'v'rgelo k'gpv'f gn' Cwqr ctv'kuo q' Cti gpv'kp'q' *Ng{' 490485+' ucpek'qpcf c'gp'4238'guv'cd'rg'eg're'p'ge'guk'f cf 'f g'eqp'vct'eqp'o qf grqu'gz'ewuk'xqu'gp'gn'O gtequw' r ctc'r qf gt'cf j g'ktug'cn't²i ko gp0' Cf go^a u. 're'ng{'f g'Rtqo qek>p'f g're'k'pf wutk' Cwqo qvt'k' / Cwqr ctv'kuc'{'uw'Ecf gpc'f g'Xc'rt' *Ng{' 4908: 8+'ucpek'qpcf c'gp'ugr v'go dt'g'f g'4244'uki w'g'guv' f k'geek>p'{'c's w'g're'cr tqd'cel>p'f g'mqu'r tq{gevu'f g'k'px'gtuk>p'r t'gug'v'cf qu'gp'gn'o cteq'f g'f lej c' ng{' t'gs w'gt'g're'cf j guk>p'r t'g'xlc'cn't²i ko gp'k'puk'w'kf q'r qt're'4904850"

" Uqdt'g'guv'dcug'ug'eqpuk' gtc's w'g.'cpv'g're'k'pecr cekf cf 'f gn'r c'f'u'f g'm'q' tct'cncu'geq'p'qo 'f'cu' f g'g'uec're'c'pk'x'gn'ugevt'kcn'eqo q'u'f'r wgf gp'j cegt'p'cek'ppgu'i t'cpf gu'eqo q'Ej k'pc. 'k'pf k'{'Dtcukn' re'gur g'ek'n'k' cel>p'gp'r leni'w'u'o g'f k'pcu's w'g'ug'j c'k'f q'r tqf w'ek'p'f q'gp'mqu'Ànko qu'c^o qu. 'k'gp'g' ko r qt'v'p'v'gu' gh'gev'u'r quk'x'qu'gp're' g'ut'vew'tc' k'pf wutk'cn' f qo² u'lec0' Gpvt'g'mqu'o ku'o qu'ug' gpew'gp'v'c<' gn' c'r'ec'peg' f g'o c{qt'gu' g'uec'ru' c' r ctv'k' f g' wp' r tqf w'ev'q' gur g'ek'n' o c{qt' eqo r rgo gpv'ctk'gf cf 'eqp'Dtcukn' *r leni'w'u'ej k'ecu'{'eqp'O² z'leq' *r leni'w'u'i t'cpf gu'+ 'm'ewnc'r gto kg' ceeg'f gt' c' o gtecf qu' f gn' O gtequw' {" r'v'kp'qco g'le'c'p'qu. " {" i gp'g'c' w'pc' o c{qt' gur g'ek'n'k' cel>p'f gn'gp'v'co cf q'cwqr ctv'kuc'f qo² u'lec0'Rqt'm'ewnc'ug'r r'cp'v'c're'r quk'd'k'kf cf 'f g' uwo ct'k'peg'v'xqu'gur g'e'f'lequ'c'rcu'k'px'gtuk'ppgu'gp'guv'v'k' q'f g'xgj 'fwmqu'r ctc'r tqh'w'p'f k' ct'guv'g' r g't'h'k'f g're'k'pf wutk'cwqo qvt'k' cti gpv'kpc'gp'gn'o w'p'f q0"

" C'uw'x'g|. 'c'guv'g'rgo gpv'ug'r wgf g'uwo ct're'r tqo qek>p'f g're'w'k'k' cel>p'f g'r r'v'chqto cu' eqo w'p'gu'f g'r leni'w'u'eqp'UWXu.'r gto k'k'gp'f q'c'r'ec'p| ct'o c{qt'gu'geq'p'qo 'f'cu'f g'g'uec're.'eqo q' j k'q'Vq{qvc0'Rctc're'go w'r'ek>p'f g'guv'qu'o qf grqu'r qf t'f'ep'f guctt'q'm'tug'f k'v'k'p'v'u'r tqi tco cu'f g'

kpegpvkxqu'hkuecrgu."lo r qukxqu"q"eqo gtekrngu."eqp"gn'hkp"fg"fkki k"o "a u"hqecrk cf co gpvg"rcu" pwxcu'kpxgtukppguO'

Qvc"ectcevgt¶ukec's wg"j c"vppk q"gn'o qf gm"fg"Vq{ qvc" { "j q{ "r ctgeg"i gpgtcrk ctug"cn" tguvq"fg"gn'ugevqt."gu"gn'hwtg'r gthkn'gZR qtvcf qt "fg"rc"kp wutlcOGuv"cwqt"eqpukf gtc"s wg."f cf qu" nqu"j ku>tlequ'r tqdrgo cu'fg'hcnc'fg'fk kucuc'gp"gn'r c¶u."s wg"ug"ci wf k ctqp"gp"nqu"Ànko qu'c° qu."{ " gnlect° evgt'f ghlekctkq'f gn'ugevqt."gn'r gthkn'gZR qtvcf qt "fg"rc"kp wutlc'cwqo qvk' f gdg'eqpugt xctug" { "r tqhwpf k ctugONcu'o gpqtgu'gZR qtvcckppgu'fg'xgi ¶ewqu" s wg"ug"tgcrk ctqp"gpvg"4234" { "4239" pp"uqp"eqo gtekrm gpvg"uwvpgvcdrgu'r ctc"rc"xcdkkf cf "fg"neqo r rglqOGp"guv"ugpvk q"vco dkp" ug"fkki g"rc"pwxcr"rg{ "fg"rtqo qekp"cwqo qvk' fg"4244" { "c"s wg"eqpvg r rc"dgpghekqu'hkuecrgu" eqo q"rc"gzgpekp"fg"gn'f gtgej q" c"rc"gzr qtvcckp"j cuvc"gn"4253"r ctc"r tqo qxgt"rcu" xgpvcu"gp"gn' gzvgtkqtO'

C"uw'xgl . "guv"r gthkn'gZR qtvcf qt "r wgf g'xgtug"r qvpekcf q"r qt "rc"tgxkukp"q"rc"pwxcr'hko c" fg"cewgtf qu"eqo gtekrngu"cdtkppf q"o gtecf qu"gzvtpquORqt"glgo r nq."gn'cewgtf q"eqp"Eqmgo dkc." f qpf g"j c { "wpc"ewvc"r tghgtpekn'eqpepvtcf c"gp"gn'ugi o gpvq"fg"cwqo »xkrgu."pq"ug"eqpf keg" eqp"gn'cewcn'r gthkn'r tqf wekxq" { "gzr qtvcf qt "fg"rc"kp wutlc'cwqo qvk' "gp"rc"Cti gpvpc."r qt"nq" ewcn"r qf t¶c"clwvctug"guv"tvcf q"gp"dcug" c"rc"gur gekrk cekp"r tqf wekxq"fg"gn'r c¶u"gp"r kem'w u" o gf kpcuOC"uw'xgl . "gn'tgclwv"fg"rc"tgi wrcckp"fg"neqo gteq"dkr vgtcn'eqp"Dtcukn'ug"r wgf g" tgecrkdtct"r ctc"r tqr lekct"guvcvgi kcu'fg"o c { qt"gur gekrk cekp"kpvtctgi kpcrORqt"qvtq"rcf q."ug" r wgf gp"r gpuct"pwxqu"cewgtf qu"eqo gtekrngu" c"o gtecf qu"gp"nqu"ewcrgu"ug"r wgf c"eqo r gvk"eqp" Uw^a hlec" { "Vckrpf kc"eqp"gn'cdcuveko kppvq"fg"rc"kem'w u"o gf kpcu."vrgu"eqo q"r c¶u"fg"fg" hlec" g"kpenuq"Guvcf qu"Wpkf quOGp"guv"Ànko q"gn'o gtecf q"fg"rcu"r kem'w u"gu"fgo kpcf q"r qt"nqu" o qf gmqu"fg"o c { qt"vco c° q"full size"r gtq"gzkuv"wp"r Àdrkq"rcvkp" s wg"r tghgtg"rcu"fg"vco c° q" o gf kcpq" { "r qf t¶cp" ugt" cdcuvekf cu" f guf g" Cti gpvpc." f gur rc| cpf q" c" nqu" r qequ" o qf gmqu" o gzlecpqu" { "c"Vckrpf kcO'

" Cf go ^a u." guv"r gthkn'r tqf wekxq"j c"vppk q"tguwncf qu"hxqtcdrngu" gp"i gpgtcrn'r ctc" gn' gptco cf q" cwqr ctvuc" xkpewrcf q" eqp" Vq{ qvc." gn' ewcn' ug" j c" dgpghekcf q" vco dkp" fg" rc" gur gekrk cekp" fg" uwu" r tqf wevqu" r ctc" guvqu" xgi ¶ewqu." nqu" xqnÀo gpgu" fg" eqo r tcu" { " rc" guvcdkkf cf OGuvq."c"uw'xgl . "j c'r gto kkf q's wg"guvcu'r tqxggf qtcu'eqpuki cp"b c { qt"guecnc" { "r wgf cp" cu"¶dclct"uwu'equvqu."nq"ewcn'j c"tgf wpf cf q"gp"ghgevu'r qukxqu'r ctc"vqf q"gn'eqo r rglqOGp"guv" ugpvk q." r qn¶kecu" s wg"r tqo wxcp" guv" gur gekrk cekp" cwqr ctvuc" { " tgi wrgp" guv" tgmcekp" vgo kpcn'r tqxggf qt." r tkkn'gi kcpf q" gn'uquvplko kppvq" fg" eqpvtcvqu" guvcdrngu" gp" gn' vgo r q" uqp" ngeekppgu" s wg"r wgf gp"wkkr ctug"gp"gn'tguvq"fg"gn'ugevqtOGp"r ctvewrc."gn'kpukwvq"fg"O qxkkr cf " s wg"ug"etgct¶c"gp"Cti gpvpc" c"r ctvk" fg"rc"rg { "fg"rtqo qekp"eqphqto ct¶c"wp"eqpuglq"fg"ktgevkxq" eqp'tgr tguvpcpvqu'fg"nqu'f kvkpvqu"cevtgu'kpvtxkppvqu'fg"rc"ecf gpcOUk'dkpp"j cuvc"o gf kcf qu"

f g"4245"ru"ectcevt f"lecu" f gn'lpukwwq"pq"hwgtqp"guvcdngkf cu."ugt" f g"ugcdng"s wg" c" r ctvt" f gn' o kuo q"ug"eqpvtqngp"qu"x"pewqu"gpvtg"ru"vgo kpcrgu" { "ru"cwqr ctvku" { "gn'o qf gmq" f g"Vq { qvc" { "luu'r tqxggf qtgu'r wgf g'ugt"wp"glgo r mq'xktwquq'ht gpvg" c"qvtqu'ecuqu'hcnkf qu'gp"guvct'gmeqkpgu" gp"gnr c"u0F g'hqto c'uko krt."rc'tgnekp" f g"eqqr gtcekp"gpvtg"gnlupf kecq" { "rc"go r tguv"hwg"qvtq" r wpvq"egpvtcni'r ctc"gnf gugo r g° q" f g"Vq { qvc."r qt"mq"vcpvq."go wrct"guv" hqto c" f g"xpewnekp"gp" gnltguvq" f g"ru"eqo r c° f"cu"vco dlē p"ugt" f" wpc" f ktgeekp" f g"ugcdng0

C"lw'xgl . "cwps wg"pq"hwg"wpc"vgo a vlec"egpvtcni'f g"rc"v'guku."rc"lpf wutkc"cwqo qvtk" b" wpf kcn' guv" "ukpfp q" qdlgvq" f g" wpc" vcpuhqto cekp" f g" i tcp" o ci pkwf " c" r ctvt" f g" rc" eqpgevkkf cf . " cwqpqo f" . "eqo r ctvek" { "grgevtkhecekp" f g"mq"xgj f"ewqu"gp"wp"eqpvz vq" f g"t" r kf qu"cxcpogu" vgepqn>i kequ" { " ci wf c" etkuku" erko a vlec0 UK' dlgp" guvqu" eco dkqu" guv" p" r tqf wekē pf qug" cegrtcf co gpvg" gp"ru"tgi kqpgu" f gn'egpvtq" f g"rc" EI X"cwqo qvtk . "rc" f guectdqpē cekp" f gn' vcpur qtvg"ug"gz vgpf gt" b" a u"vgo r tcpq"s wg"vctf g'gp"qu'r c"qu"gtkē tlequ" f gdlf q" c" hqu'r tqdngo cu" f gtxcf qu" f gn'eco dkq"erko a vlec0"

"Gp" guv" eqpvz vq . " gn' ugevqt" cwqo qvt" cti gpvqp" / { " r tkpek cmo gpvg" gn' gpvtco cf q" cwqr ctvku" hqecn" ug" xgt" " gpltpvcf q" c" b" Ankr ngu" f guh"qu0Guv"vgo c" gu" gpectcf q" gp"rc" O kēk" p" 6" f gn'Rrcp" Cti gpvpc" Rtqf wevxc"4252" f gn'gz" o kplvgtkq" f g" F gucttqm" Rtqf wevxc" f g"rc" pcekp . " qtkpvcf q" c" ko r wuct"rc" o qxkē cf " f gn'hwwtq" eqp" r tqf wevqu" { " vgepqn>i f"cu" pcekp cngu0Gp" f lej q" o cteq . "gp"4243" ug" r tguv" "gn'r tq { gevq" f g"rg { " f g" Rtqo qekp" f g"rc" O qxkē cf "Uwv'pvcdrng"s wg" r tqr qpg"wp"t² i ko gp"s wg" r tqo qxgt" "gn'f kug° q . "rc" kpxguki cekp . "rc" kppqxcelp . "gn'f gucttqm . "rc" r tqf wekē p . "rc" eqo gteckē cekp . "rc" tgeqpxgtukē p" { lq"rc" wkkē cekp" f g" xgj f"ewqu" r tqr wucf qu" r qt" hwgpvqu" f g" gpgti f"cu" uwv'pvcdrng" { " s wg" vco dlē p" r tqo qxgt" " r ctvqu . " eqplwpvqu" { " gs wkr qu" cwv'kktgu" gp" gn'vgttkqtq" f gn'r c"qu . "cwps wg" gn'o kuo q" guv" gp" r tqeguq" f g" t'gxlukē p0

" Gp" guv" f ktgeekp . "ugt" f g"ugcdng"s wg"qu" kpegpvxqu" hqecrgu" c"rc" o qxkē cf "uwv'pvcdrng" ug" f ktēcp" vco dlē p" c" eqpukwkt" wp" r qm" f g" r tqf wekē p" gur gekē cf q" gp"ru" r tko gtcu" r kēn'w u" j f"itkē cu" { " gn'v'lecu" f gn'o wpf q . "wp" o gtecf q" vqf cx" f" o w' " kpek kēpv" gp" gn'ugi o gpvq" f g" qu" xgj f"ewqu" gn'v'lequ"s wg" r qf t" f" r qukekqct" cni'r c"qu" eqo q" wp" egpvtq" o cpw'xewt gq" r kqpgtq" gp" guv" vkr q" f g" r tqf wevqu0"

Cf go a u . "guv" Anko q" r tq { gevq" f g"rg { " r tqr qpg"rc" etgcekp" f g"rc" Ci gpek" P cekqpcni'f g" O qxkē cf "Uwv'pvcdrng" eqp" wpc" kpuvwekē p" f g" K F " eqp" r tqi tco cu" r tqo qekqpcrgu" gur ge" hēqu0 Gp" guv" ugpvkf q . " c" hq" rcti q" f g" guv" v'guku" ug" j cp" xlvuq" qu" r f" b" kgu" t" f" kf qu" s wg" ko r qpg" c"rc" h'kēn' cti gpvpc" f g" Vq { qvc" s wg" gn'egpvtq" f g" K F " f g"rc" J kwz" ug" j c { c" guvcdngkf q" gp" Vckrcpf kc0Rqt" hq" vcpvq . "rc" r qukdē cf " f g" s wg" guv" pwxq" kpuvwwq" vcdclg" gp" eqplwpvq" eqp" ru" go r tguv" o w' kpekqpcrgu" r ctc" tgcikē ct" cev'kkf cf gu" f g" K F " s wg" n'gi q" r wgf cp" tgf wpf ct" gp" o c { qtgu"

ecr cekf cf gu'r ctc'rcu'go r tgucu'qecrgu. 'ekgp'f'lequ'{''tcdclcf qt gu'cti gp'v'pqu. 'ugt'c'wpc'f'k'geek'p'
ht wev'f'gtc'f'g'guc'r qn'f'lec0"

F g" guv"o qf q. "rcu"r tqr wguvcu"r tgugp'cf cu"r tgv'p'f gp" eqp'v'k'd'w'k' "cn'f' guctt'q'm'q' f'g' rcu"
hwgt| cu"r tqf we'k'x'cu" qecrgu. "gp'v'p'f' k'g'p'f' q' guv" q'd'lg'v'k'x'q" eqo q' wpc" o gvc" k'p'f' k'ur' g'p'uc'd'rg" r ctc"
o glqtct'gn'd'k'g'p'gu'ct'f'g'rc' r' q'd'rc'ek'p'cti gp'v'p'c'0'Nc'hcug'cew'cn'f' gn'ecr' k'cr'kuo q'o w'p'f' k'cn'ko r'q'p'g"
hwgt'v'u" t'g'u't'k'ek'q'p'gu" c" n'q'u" r' c'f'g'u" r' g't'k'f' t'lequ" { "c" uwu" r' t'q' { g'ev'q'u" f'g' f' guctt'q'm'q' "geq'p'»o' k'eq."'
t'g'f' we'k'p'f' q'ec'f' c'x'g'l' "o" a' u'rcu'ug'p'f' g't'q'u'q't'k'g'p'cf' q'u'c'eco' d'k'ct'rc' r' q'ule'k'p'f' g'g'uc'u'p'ce'k'q'p'gu'gp'gn'
g'ue'g'p'ct'k'q' k'p'v'g't'p'ce'k'q'p'c'f'0'G'p'rc'q' s' w'g' t'g'ur' g'ev'c'rc' k'p'f' w'ut'k'c'cw'q'o' q'v'k'k' . 'v'q'f' q'k'p'f' k'ec' s' w'g'gn'le'q'p'v'q'n'
f'g'rc'ec'f' g'p'c"ugi' w'k'a" gp"o' cp'q'u" f'g'w'p'r' g's' w'g'o' q'i' t'w'r' q'f'g'go' r' t'gucu'gz'v'c'p'l'g'tcu. "r' q't' m'v'c'p'v'q."
g'p'eq'p'v'ct'rc' b' gl'q't' h'q'to' c'f'g'c't'w'w'rc'ek'p'r' ct'g'eg'ugt' w'p'c'v'ct'g'c'k'p'g'x'k'c'd'rg'r' ctc' C'ti' gp'v'p'c'0'F'g'g'uc"
h'q'to' c. "gp'v'p'f' g't' gn'eqo' r' q't'v'co' k'g'p'v'q. "rc" v'c' { g'ev'q't'k' " { "m'u" k'o' r' c'ev'q'u" f'g' rcu" f' k'v'k'p'v'cu" h'k'to' cu"
r' t'g'v'p'f' g'cr' q't'v'ct'rc'rc' eq'p'ut'w'ec'k'p'f'g'w'p'c'k'p'f' w'ut'k'c'cw'q'o' q'v'k'k' "o" a' u'r' t'»ur' g'tc' { "uw'v'g'p'w'c'd'rg'0'

Rqt" A'nc'o' q. "c'w'p's' w'g" u'w'r' g't'g' gn'c'rc'ep'eg'f'g' g'uc" v'g'u'k'u" { "rcu" c'ew'w'rg'u" eq'p'f' k'ek'q'p'gu" f'g"
r' q'k'd'k'k'f' c'f. "g'v'g'cw'q't' eq'p'k'f' g'tc' s' w'g'p'q' f'g'd'g'c'd'c'p'f' q'p'c't'ug'gn'u'w'g'o' q'f'g'rc' "t'g'et'g'ce'k'p'f'g'w'p'c"
cw'q'o' q'v'k'k' "p'ce'k'q'p'c'f'0'Eqo' q' u'q'u'w'x'q" w'p'q' f'g' n'q'u" o' a' z'k'o' q'u" t'g'h'g't'g'p'v'g'u" f'g'rc" g'eq'p'q'o' f'c' f'gn'
f'g'uctt'q'm'q. "J' c/L'q'p'p' "E'j' c'p'i. "gp'rc" W'K' "gn'; "f'g'o' c' { q'f'g'4245" "un gran error de Brasil y
Argentina fue no desarrollar automotrices nacionales". "G'p'g'v'g'v'c'd'cl'q'ug'j' c'f'g'o' q'v'ct'f' q' s' w'g"
gn'q't'k'i' g'p'f'g'rc' r' t'q'r' k'g'f' c'f' f'g'rcu' h'k'to' cu' n'f'f' g't'g'u'f' g'g'uc"ec'f' g'p'c"gu'u'w'o' c'o' g'p'v'g'k'o' r' q't'v'c'p'v'g'r' ctc'gn'
f'g'uctt'q'm'q'geq'p'»o' k'eq' f'g'f' l'ej' q'u'r' c'f'g'u'0'E'rc't'c'o' g'p'v'g. "eq'p'rcu'eq'p'f' k'ek'q'p'gu'geq'p'»o' k'ecu. 'r' q'n'f'k'ecu"
{ 'u'q'ek'rc'u'f'g' C'ti' gp'v'p'c'c' o' g'f' k'c'f' q'u'f' g'4245'w'p'r' m'p'f'g' h'q'to' c'ek'p'f'g'w'p'c'go' r' t'g'uc'p'ce'k'q'p'c'n's' w'g"
eqo' r' k'c'eq'p'l'w'i' c'f' q't'g'u'g'v'c'f' q'w'p'k'f' g'p'ug'u. "ej' k'p'q'u. "l'c'r' q'p'g'ug'u. "g'w't'q'r' g'q'u. "eq't'g'c'p'q'u'g'k'p'f' k'q'u'r' ct'g'eg"
f'g'ue'c'd'g'm'c'f' q'0'P' q" q'd'u'x'c'p'v'g. "rcu" e'c'r' c'ek'f' c'f' g'u'et'g'c'f' cu' gp" v'q't'p'q" c"rc" h'c'd't'k'ec'ek'p'f'g' r' k'cn'l' w'r' u"
o' g'f' k'c'p'cu. "rc" k'p'o' c'f' w't'g'l' "f'g'rc" g'g'ev'v'k'k'ec'ek'p'f'g'g'v'g'o' g't'ec'f' q. "rc" f' k'ur' q'p'k'd'k'k'f' c'f' "f'g"i' t'c'p'f' g'u"
t'g'ug't'x'c'u'f'g' h'k'k'q'c'n'p'q't'q'g'v'g'f' g'n'r' c'f'u. "n'q'u'k'p'ek'r' k'g'p'v'g'u'k'p'v'g'p'v'q'u'f'g' h'c'd't'k'ec'ek'p'f'g' d'c'v'g't'f'c'u'f'g'k'q'p'g'u"
f'g'h'k'k'q. "n'q'u't'g'ew't'u'q'u'j' w'o' cp'q'u'gp'gn'le'q'o' r' n'g'l'q'cw'q'o' q'v'k'k' { "gn'l'uk'v'g'o' c'ek'g'p'v'f'le'q'u'r' w'g'f' g'p'r' g't'o' k'k't"
c'rc' u'q'ek'g'f' c'f' c'ti' gp'v'p'c'r' g'p'uct'gp'gn'lw'g'o' q'f'g'rc'et'g'ce'k'p'f'g'w'p'c'cw'q'o' q'v'k'k' "r' t'q'f' w'ev'q't'c'f'g'r' k'cn'l'
w'r' u'g'n'f'ext'k'ecu'r' ctc' "g'z'r' q't'v'ct" c"Co' 2' t'lec'N'c'v'p'c' { "gn'o' w'p'f' q'0'Cu'f' "o' a' u'c'n'l' f'g'rcu" f' h'k'w'nc'f' g'u"
q'ec'rgu" c'ew'w'rg'u" { "f'g'n'q'gz'v't'g'o' c'f' c'o' g'p'v'g'eqo' r' n'g'l'q' s' w'g'r' w'g'f'g'ugt'go' r' t'g'p'f'g't'w'p'r' t'q' { g'ev'q' f'g"
g'v'g'v'k'r' q. "p'q" r' w'g'f'g'f' g'ue'c't'v'ct'ug' g'uc" k'f' g'c' { "c' s' w'g'g'uc" q'r' q't' w'p'k'f' c'f' "n'g" r' g't'o' k'k't'f'c" C'ti' gp'v'p'c"
k'p'ug't'v'ct'ug'gp'w'p'c'ec'f' g'p'c'i' m'd'cn'f'g'x'c'm'q't'go' g'ti' g'p'v'g'eq'p'w'p'c'o' c' { q't' r' c't'w'ek'r' c'ek'p'gp'gn'o' c'r' c"
r' t'q'f' w'ev'k'x'q'i' n'q'd'c'r'0"

ANEXO METODOLÓGICO

1 - Índice de Herfindahl e Hirschman

Gn'pf keg'f g'J gthkpf cj n'q' pf keg'f g'J gthkpf cj n'g'J ktuej o cp' "3; 86+0' Gn'pf keg'ug' ecnwrc'gnxcpf q'cn'ewcf tcf q'rc'ewq'f g'o gtecf q's wg'ecf c'r c'f'u'r qugg'*gp'guy'ecuq+'{ 'uwo cpf q' gucu'ecp'kf cf gu'Gn't guwncf q'o a zko q'gu'32022.'ewcpf q'wp'uq'rq'r c'f'u'qr gtc'gp'gr'o gtecf q'eqp' wpc'eqpegp'tcek»p'vq'cn'f gr'o gtecf q'="r qt'q'vt'q'rc'f q.'gn'xcm't'f gn'pf keg'ug'tgf weg'eqphqto g'rcu' ewq'cu' f g" o gtecf q" ug" f kwt'kdw'f gp" gp" hqto c" o a u" gs wkc'vxc" { " ewcpf q" j c { " o a u" r c'f'ugu" r ct'vkr cp'vgu'G'u'f gek't.'gn'pf keg'J "gu'rc'uw'o c'f g'rc'u'ewcf tcf qu'f gn'r qtegp'vlg'f g'o gtecf q'f g' ecf c'wpc'f g'hqu'P' r c'f'ugu's wg'hq'eqo r qpgp'OGn'e'a rewq'ug'r wgf g'g'zr t'guct'f g'rc'uki wkgp'v'o cp'gtc<"

$$H = \sum_{i=1}^N s_i^2$$

2 - Valor de vehículos producidos por terminal automotrices

Gn'xcm't'f g'xg'pvc'f g'xg'j 'f'w'rq'r tqf welf q'rq'ecm' gp'v'r qt'ecf c'v'gto kpcn'cwqo q'v'k' "ug' ecnwrc'c'r ct'vt'f gn'xcm't'gp'r guqu'f g'ecf c'b' qf gr'q'r tqf welf q'r qt'ecf c'v'gto kpcn'gp'lw'kq'f g'ecf c' c'o q'ugi 'Ap'rc'i w'f'c'q'h'ekcn'f g'r r'g'ekqu'f g'CECTC" *eqpuwncf c" c'r ct'vt'f g'y gd'ctej kxg'Q'ti + clw'wcf q'r qt'gn'r tqo gf kq'cp'wcn'f gn'vkr q'f g'eco dk'f gn'f »rc't'g'wcf q'w'pkf gpug'f gn'DETC'OC'guy'g' t'guwncf q'ug'uw'o cp'rcu'g'zr qt'v'ek'q'p'gu'f g'cwqr ct'v'gu'f g'v'qf cu'rcu'v'gto kpcrgu'cwqo q'v'k'egu'f c's wg' f qu'f g'gr'cu.'H'cv'f' 'X'qmuy ci gp.'r tqf weg'p'ec'lcu'f g'eco dk'v'co dk'p'gp'uw'r r'p'v'cu's wg'f gu'k'p'cp' c'o gtecf qu'f g'g'zr qt'v'ek'»p'0"

3 - Contenido importado de los vehículos nacionales

Nc'g'u'ko cek»p'f g'eq'v'g'p'kf q'ko r qt'v'cf q'ug't'g'cr'k' c'c'r ct'vt'f g'rcu'ko r qt'v'ek'q'p'gu'f g'r ct'v'gu' { 'r k'g' cu'gp'f »rc't'gu'f g'ecf c'v'gto kpcn'ugi 'Ap'rc'encu'k'lecek»p'f g'r qu'ek'q'p'gu'ct'c'p'eg'rc't'kcu't'g'cr'k' cf c' r qt'I a tt'k' "{ 'R'cp'ki q'4236+0C"eq'p'w'p'cek»p.'ug'f g'v'c'm'p'rcu'r qu'ek'q'p'gu'ct'c'p'eg'rc't'kcu'w'k'k' cf cu' uki wkgp'f q'c'h'qu'cw'qt'gu<"

Conjunto	Subconjunto	Producto	SH 2012
Cuerpo y partes	Cuerpo	Cuerpo	870790
		Cuerpo	870710
	Piezas interiores	Asientos	940120
	Partes del cuerpo	Cerraduras	830120
		Guardabarros; parrillas; puertas; paneles de instrumentos; otras partes del cuerpo	870829
		Guarniciones, accesorios y piezas	830230
		Parachoques y piezas	870810
	Sistema de seguridad	Airbags y piezas	870895
		Cinturones de seguridad	870821
	Vidrio	Espejos retrovisores	700910
		Vidrio de madera contrachapada	700721
		Vidrio templado	700711
	Chasis, sistema de transmisión y sus partes	Sistema de dirección	Dispositivos especiales para discapacitados y otros accesorios para piezas y cuerpos
Volante, columnas, cajas de dirección y piezas			870894
Sistema de escape		Silenciadores, tubos de escape y piezas	870892
Sistema de frenos		Revestimientos de amianto	681320
		Forros de freno; Frenos, frenos de potencia y piezas;	870830
		Pastillas y forros de freno	681381
Sistema de transmisión		Cajas de engranajes y piezas	870840
		Ejes (con diferencial o portadores) y piezas	870850
		Embragues y piezas	870893
		Embragues y sus fiestas; otras guarniciones	681389
		Piñones y otros cuerpos elementales de transmisión	848390
Suspensión y amortiguación	Ruedas, piezas y accesorios	870870	
	Resorte foliar	732010	

		Muelles helicoidales	732020
		Sistemas de suspensión, amortiguadores	870880
Motores y piezas	Motores	Gasolina motores <1000 cm3	840733
		Gasolina Motores > 1000 cm3	840734
		Motores diésel o semidiésel	840820
		Otras partes del motor	Cigüeñales, árboles de levas; árboles flexibles; mangos; Otros ejes de transmisión
			848410
	Focas		848420
			848490
		Poleas y volantes	848350
	Piezas de motores diésel	Bloques y envolturas; válvulas de admisión o escape; válvulas de entrada o escape de tubos múltiples; Guías; Émbolos (pistones); varillas; colillas; Boquillas; anillo de pistón (pistón); camisas de cilindros	840999
	Piezas de motor de gasolina (gasolina)	Bielas; Bloques, culatas y carcasas; carburadores; válvulas de admisión o escape; entrada o escape de tubos múltiples; anillo de pistón (pistón); guías de válvulas; carburadores; Émbolos (pistones); camisas de cilindros; inyección electrónica	840991
	Piezas del motor - combustión	Bomba de gasolina (gasolina); inyección de combustible; bomba de aceite; otras bombas	841330
		Bujías	851110
		Filtro de aire	842131
Filtro/aceite de nafta		842123	
Otras partes	Otras partes	Sellos, juntas, anillos y otros	401693
	Rumbos	Radiadores y piezas	870891
		Piezas del rodamiento	848299
		Rodamientos de agujas	848240

		Rodamientos de bolas	848210
		Rodamientos de rodillos cónicos	848220
	Válvulas	Válvulas neumáticas u oleohidráulicas	848120
Remolques, semirremolques y piezas	-	Chasis de remolques y semirremolques	871690
		Tanques	871631
		Otros remolques y semirremolques	871640
		Otros remolques y semirremolques para el transporte de mercancías	871639
		Remolques	871610
Ruedas, neumáticos y piezas	Neumáticos	Neumáticos Neumáticos coches	401110
		Neumáticos para camiones	401120
	Piezas de neumáticos	Cámaras de goma	401310
		Guardias y bandas	401290
Sistemas eléctricos y electrónicos y piezas	Baterías y piezas	Baterías	850710
		Dinamos, alternadores y otros generadores	851150
	Calefacción/Refrigeración/ventilación	Climatización	841520
	Otros componentes eléctricos	Limpiaparabrisas y eliminadores de escarcha	851240
	Iluminación y señalización	Cuernos y sirenas	851230
		Faros; luces fijas; maniobra de luces; cajas combinadas; otra señalización visual e iluminación	851220
		Piezas ópticas	701400
		Otras piezas eléctricas de señalización	851290
	Instrumentación del panel	Partes de instrumentos de medición o control de nivel	902690
		Relojes de panel	910400
	Sistema de audio	Estéreos	852721
			852729
	Sistema de encendido	Distribuidores y bobinas de encendido	851130

		Cables de bujías	854430
		Imanes y el otro	851120
		Motores de arranque	851140
		Partes de aparatos y aparatos de encendido	851190
		Disyuntores reglamentarios; encendido de dispositivos electrónicos; otros aparatos y dispositivos	851180

F lej qu'xcmqtgu'ug'gukto ctqp'uqdtg'gn'xcmqt'gp'r guqu'f g'ecf c'b qf grq'r tqf wekf q'r qt'ecf c' vgtto kpcn'gp'lwkl'f g'ecf c'c° q'ugi Àp'rc'i w'c'q'hlckn'f g'r tgekqu'f g'CECTC" *equuwn'cf c'c'r ct'vt' f g'y gd0'tej kxg0'ti +clwuxf q'r qt'gn'r tqo gf kq'cpwcn'f gn'vr q'f g'eco dlq'f gn'f »rc't'guxf qwpkf gpug' f gn'DETC' uwo cf q'c'rcu'g'zr qt'vckqpgu'f g'cwqr ct'vgu'f g'ecf c'vgtto kpcn'cwqo qvtk' "cti gp'vpc0"

Ecdg'f guxect's wg'gug'o 2 vqf q'gu'f kuxpvq'cn't'gcnk' cf q'r qt'ecf c'vgtto kpcn'cwqo qvtk' "{ " gn'O kpxvgtk'f g'Rtqf week»p'k'f wuxk'r ctc't'gcnk' ct'mqu't'gk'p'v'gi tqu'f g'rcu'ng' { gu'cwqr ct'vkuu. " ugi Àp'gn'ewcn'Vq' { qw'eqvcdc"gp"4243"eqp"wp"62' "f g'r ct'vgu' { "r kgl cu'mqecrgu" *Nwku"N»r gl. " gpvt'gxkuc'r gtuqpcn"38B44244-0"

4 - Red social egocéntrica de los nueve principales accionistas de Toyota Motor Corporation

Gp'rc'rkxgtcwtc'o g'vqf qn»i kec'f g'cp'a ruku'f g'tgf gu'uqekrgu.'rcu'tgf gu'gi qe² pvtkecu'uqp' rcu's wg'gu' p" gphqecf cu'gp'gn'gzco gp'f g'wp'pqf q'egpvtcn' { "rc't'g'rc'ek»p'f g'gug'eqp'gn't'gux'f g' rqu'pqf qu'f g'r tko gt. "ugi w'pf q'q'o a u'pkxgrgu" *O ctuf gp."4224+. "Gn'f kci tco c'gu'grxdqtcf q'c' vtcx² u'f gn'uqhy ctg'WEK GV0Rctc'gug'ecuq'ug'w'wk'k' c'eqo q'pqf q'egpvtcn'c'rc'eqo r c° ¶c'VO E" { 'ug'f g'vgtto kpc'uwu'r t'kpek' crgu', 'ceekqpkuc'u' c' { qtkctkqu'c'r ct'vt' f g'rc'k'phqto cek»p'f g'uw'r a i kpc' q'hlckn'cn'42420'Gn'pqf q'egpvtcn'f g'VO E'r qugg'wpc'gucrc'f g'wco c° q'o c' { qt'r ctc'k'pf kect'uw' egpvtcn'f cf 0Nqu'pqf qu's w'g'hqto cp'r ct'v'f g'Vq' { qw'eqo q'ceekqpkuc'u'f k'g'evqu't' quggp'wpc'gucrc'f g'wco c° qu'f gr g'pf k'pf q'uw'r ct'v'ek' cel»p' gp'rc'eqo r c° ¶c'0'C"uw'xgl. "r quggp'wpc'gucrc'f g' wco c° q'o c' { qt'c'mqu'pqf qu'f gn'ugi w'pf q'pkxgn'f g'ceekqpkuc'u" *gu'f gek. "qu'ceekqpkuc'u'f g'qu' ceekqpkuc'u+0Nc'k'phqto cel»p'f g'w'rc'f c'f g'ecf c'w'p'q'f g'guxqu'ceekqpkuc'u'ug'gpewgpvtc'gp'rc'Vcdrc' 2/8'f gn'CPgzq'Guxf ¶v'keq0"

Rqt'qvtq'rcf q.'rcu'f k'geekqpgu'f g'rcu'hrgej cu'k'pf kecp's w² 'go r t'guc'r qugg'c'rc'q'v'c'f g'b qf q' vcn's wg'rc'ecdgl c'f g'rc'hrgej c'ug'r quc'uqdtg'rc'eqo r c° ¶c'r qug'¶c'r qt'uw'ceekqpkuc'0Rqt'Ànko q." gn'eqm't'f g'rcu'pqf qu'k'pf kec'rc'p'ceekqpcrk'f cf 'f g'ecf c'ht'o c'f gr g'pf k'pf q'f g'f »pf g'gu'² w'dlecf c' uw'ecuc'o c'vtk' 0Rqt'rq'v'cpvq. 'ug'w'wk'k' c'gn'leqmt'c| wlr ctc'GGWW' { "gn't'qlq'r ctc'Lcr »p. "uk'g'pf q'rcu' Àplequ'f qu'r c'¶gu'k'pxq'w'et'cf qu'gp'rc't'gf 'uqekn'f g'rcu'p'w'g'x'r tqr k'v'ct'kqu'f g'r tko gtq' { "ugi w'pf q' pkxgn'f g'VO E0"

5 – Análisis de correlación entre variaciones PIB Argentina y ventas en el mercado interno de vehículos

" Nc"gxqmek»p" f gn'RKD" f g'Co 2 tlec'Ncvkpc"ug"ecrewr"eqo q"r"xctkcek»p"cpwcnf gn'RKD" f g" vqf qu"mqu"r c"lgu" f g"r"tgi k»p"gzegr vq"O 2 zleq" c"r tgekqu"eqpuvcpvgu" Nc" gxqmek»p" f gn'RKD" f g" Cti gpvkpc"ug"ecrewr"eqo q"r"xctkcek»p"cpwcnf gn'RKD" c"r tgekqu"eqpuvcpvgu"

Gp"gn'I tª hleq"KX/3"ug"tgr tgugpvc"rcu"eqttgnekqpgu"gpvtg"r"xctkcek»p"r qtegpwcnf gn' RKD" c"xcmtgu"eqttkpgv" f g"Cti gpvkpc" { "r"xctkcek»p"r qtegpwcn'gp"r"r tqf week»p" f g'xgj ¶ewqu" f g"vqf cu"rcu"go r tgucu" f g"Cti gpvkpc"o gpqu"Vq{ qvc"ªI tª hleq"C+" { "r"xctkcek»p"r qtegpwcnf gn' RKD" c"xcmtgu"eqttkpgv" f g"Cti gpvkpc" { "r"xctkcek»p"r qtegpwcn'gp"r"r tqf week»p" f g'xgj ¶ewqu" f g"Vq{ qvc"Cti gpvkpc"ªI tª hleq"D+" ugi Àp" mqu"uki wkgpvu"tguwncf qu"ecrewr" f qu" c"vtx² u" f gn' r tqi tco c"Uvc0"

"

	PIB_Arg	Pr_TOY	Pr_Ter~g	
PIB_Arg	1.0000			
Pr_TOY	0.4936	1.0000		
Pr_TermArg	0.8364	0.3668	1.0000	"

"

Gp"gn'I tª hleq"KX/4"ug"tgr tgugpvc"rcu"eqttgnekqpgu"gpvtg"r"xctkcek»p"r qtegpwcnf gn' RKD" c"xcmtgu"eqttkpgv" f g'Co 2 tlec'Ncvkpc"gzew{ gpf q" c"O 2 zleq" { "r"xctkcek»p"r qtegpwcn'gp" r"r tqf week»p" f g'xgj ¶ewqu" f g"vqf cu"rcu"go r tgucu" f g"Cti gpvkpc"o gpqu"Vq{ qvc"ªI tª hleq"E+" { "r" xctkcek»p"r qtegpwcnf gn'RKD" c"xcmtgu"eqttkpgv" f g'Co 2 tlec'Ncvkpc"gzew{ gpf q" c"O 2 zleq" { "r" xctkcek»p"r qtegpwcn'gp"r"r tqf week»p" f g'xgj ¶ewqu" f g"Vq{ qvc"Cti gpvkpc"ªI tª hleq"F+" ugi Àp" mqu" uki wkgpvu"tguwncf qu"ecrewr" f qu" c"vtx² u" f gn' r tqi tco c"Uvc0"

"

	PIB_La~m	Pr_TOY	Pr_Ter~g	
PIB_Latam	1.0000			
Pr_TOY	0.5014	1.0000		
Pr_TermArg	0.8462	0.3668	1.0000	"

"

Gp"gn'I tª hleq"2/35"ug"tgr tgugpvc"rcu"eqttgnekqpgu"gpvtg"r"xctkcek»p"r qtegpwcnf gn' RKD" c"xcmtgu"eqttkpgv" f g"Cti gpvkpc" { "r"xctkcek»p"r qtegpwcn'gp"rcu"xgpvcu" f g"cwqo »xkrgu" gp" gn' o gtecf q" kpvtpq" f g"vqf cu"rcu" go r tgucu" o gpqu"Vq{ qvc"ªI tª hleq"C+" { "r" xctkcek»p" r qtegpwcnf gn'RKD" c"xcmtgu"eqttkpgv" f g"Cti gpvkpc" { "r"xctkcek»p"r qtegpwcn'gp"rcu"xgpvcu" f g" cwqo »xkrgu" gp" gn' o gtecf q" kpvtpq" f g"Vq{ qvc"ªI tª hleq"D+" ugi Àp" mqu"uki wkgpvu"tguwncf qu" ecrewr" f qu" c"vtx² u" f gn' r tqi tco c"Uvc0"

"

	PIB_Arg	VI_AUT	VI_T~AUT
PIB_Arg	1.0000		
VI_AUT	0.7819	1.0000	
VI_TOY_AUT	0.4248	0.4159	1.0000

"

Gp"gn'I tª hleq"2/36"ug"tgr tguvpvcp"rcu"eqttgncqkpgu"gpvtg"rc"xctkcel»p"r qtegpwcn'f gn'RID"cxmrtgu'eqttkpgvuf'g"Cti gpvkpc"{"rc"xctkcel»p"r qtegpwcn'gp"rcu"xpvcu'f'g'wkckctkqu"gp"gn'o gtecf q'kpvtpq'f'g'vq'cu'rcu'go r'rgucu'o gpqu"Vq{qvc"ªI tª hleq'E+"{"rc"xctkcel»p"r qtegpwcn'f gn'RID"cxmrtgu'eqttkpgvuf'g"Cti gpvkpc"{"rc"xctkcel»p"r qtegpwcn'gp"rcu"xpvcu'f'g'wkckctkqu"gp"gn'o gtecf q'kpvtpq'f'g"Vq{qvc"ªI tª hleq"F+"ugi Àp"rcu'uki vkpvgu'tguwncf'qu'ecrewncf'qu"cx²'uf'gnr tqi tco c'Ucxc0'

	PIB_Arg	VI_UT	VI_T~_UT
PIB_Arg	1.0000		
VI_UT	0.7938	1.0000	
VI_TOY_UT	0.6147	0.7745	1.0000

"

6 - Relevamiento principales proveedores de Toyota Argentina radicados en el país

Rctc"gn'cpª rku"f'g"rcu"r tkpkr crgu"go r'rgucu"r tqxggf'qtcu'f'g"Vq{qvc"ug"tgngxctqp"rcu"r tkpkr crgu"73"cwqr ctvkuc"u's wg"ng"xpfp'gp'f'ktgwo'gpv"c"rc"vgtò kpcn'gp"4242"cx'r'ctvk"f'g"rcu"hlej'cu"ugevqtkrgu"f'g"CHCE."f'cvqu"f'g"CFKO TC."dncrpegu"f'g"VCUC"{"gpvtgxkuc"0'Ecdg"fguacct's'wg'rcu'rkuc"u'f'g'r tqxggf'qtgu'f'g'rcu"vgtò kpcrgu"cwqo'qv'legu'vqp"eqphkf'gpekrgu0F'guf'g"Vq{qvc"Cti gpvkpc"ug"j'c'eqphkto'cf'q's'wg"gp"4242"rc"go r'rgucu"vgtò kpc"84"r tqxggf'qtgu'tcf'kecf'qu"gp"gnr'c"µ"ªNwku"Nr'gl'."gpvtgxkuc"r'gtuqpcn"38344244+0C"uw'xgl'."f'guf'g"CFKO TC"uqukpgp"u'wg'f'gn'vqcn'f'g"84"cwqr'ctvkuc"gnr'qtegpvclg"f'g'ecr'kcrgu"nqecrgu"gu'f'gn'82'."cÀp"o'c{qt's'wg"m"cpck'cf'q'gp"rc"o'wgutc'f'g'guc"vku"ªLwkq'Eqtfgtq."gpvtgxkuc"r'gtuqpcn"3344244+0'

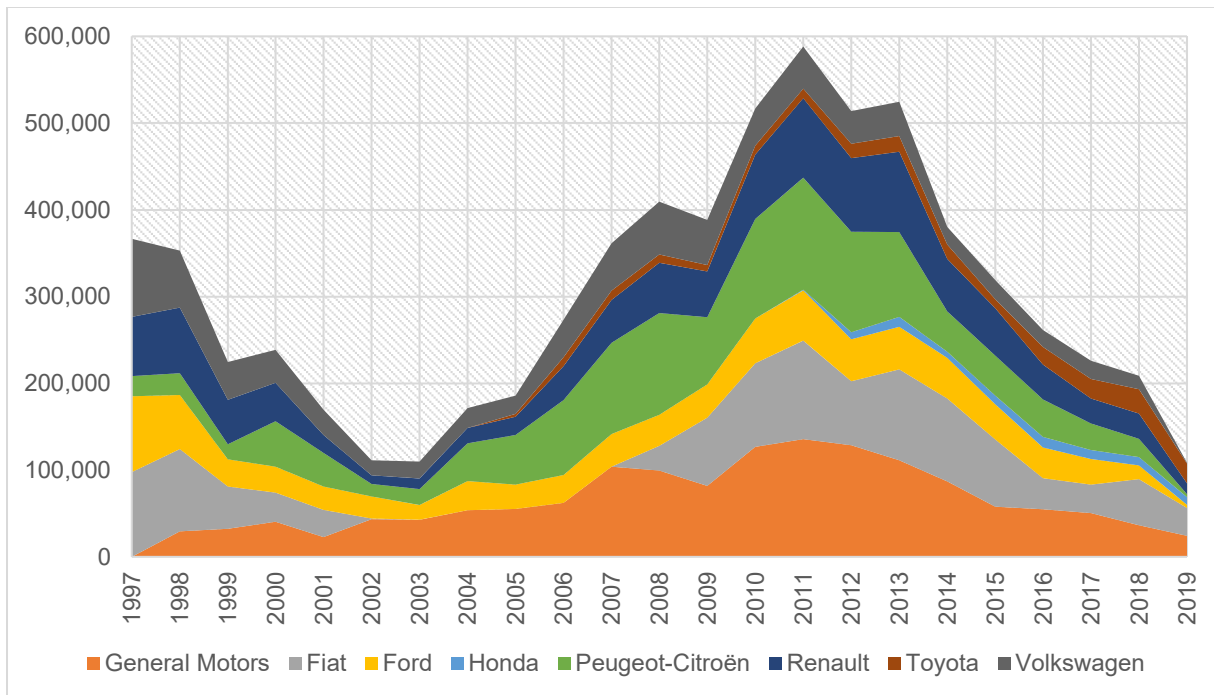
ANEXO ESTADÍSTICO

Tabla 0-1 – Clasificación de componentes según área de vehículo

Área del vehículo	Componentes principales
Chasis	Eje, piezas de freno, suspensión, neumáticos y ruedas
Conexión del vehículo	Telemática, acústica, altavoces, navegación
Ingeniería electrónica y semiconductores	Batería, alternadores, actuadores, cables, cableado, conectores, ECU, motores eléctricos, sensores, interruptores
Confort interior y seguridad pasiva	Cabina, piezas de puertas, asientos, molduras interiores, textiles
Iluminación	Iluminación interior y exterior
Materiales y peso ligero	Cuerpo, parachoques, marcos de puertas, sujetadores, juntas, sellos, adhesivos, piezas metálicas, chapa, piezas de vidrio, piezas prensadas/estampadas
Tren motriz (powertrain)	Piezas del motor, piezas de transmisión, eje de transmisión, diferencial, embrague, piezas de escape, filtros, tanque de combustible
Gestión térmica	HVAC, intercambiador de calor, refrigeración del motor, mangueras/tuberías
Interfaz de usuario y experiencia	Pantallas, cuadro de instrumentos, espejos exteriores
Movilidad autónoma	Control de crucero, cámaras, sistema de asistencia al estacionamiento, sensores
Movilidad eléctrica (e-mobility)	Sistema de batería, electrónica de potencia, motor electrónico

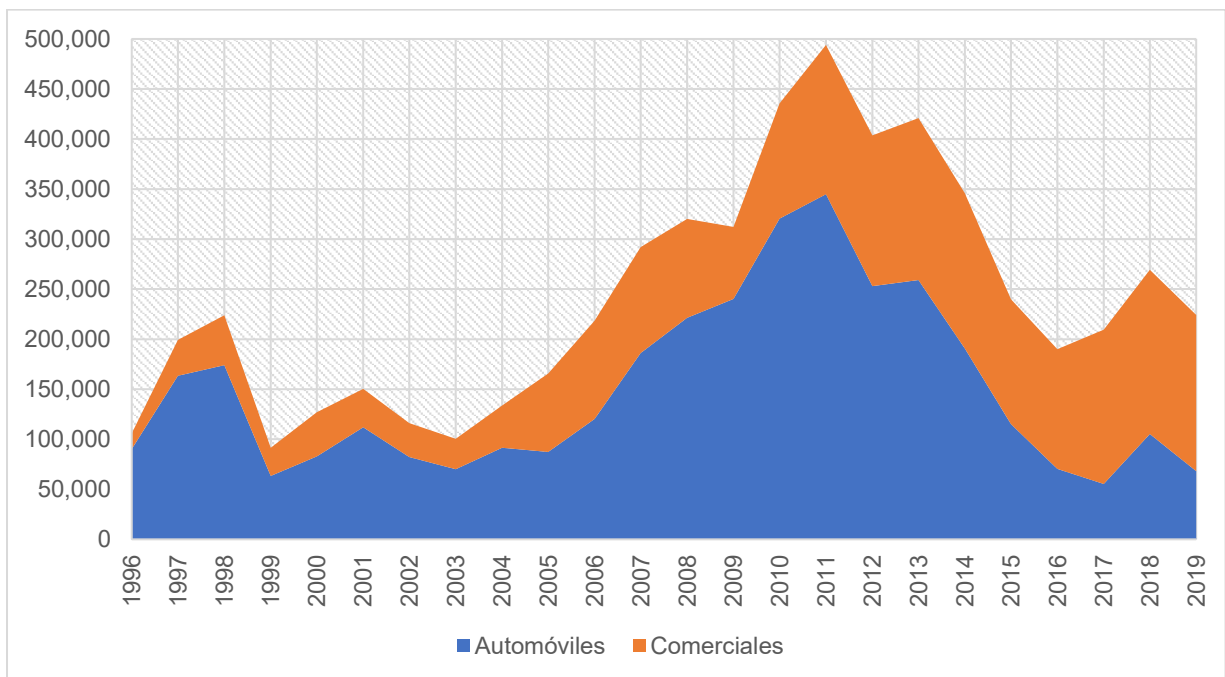
Hwpg<C wqVgej kuki j v'

Gráfico 0-1 - Producción de automóviles por empresas en Argentina (unidades) (1997-2019)



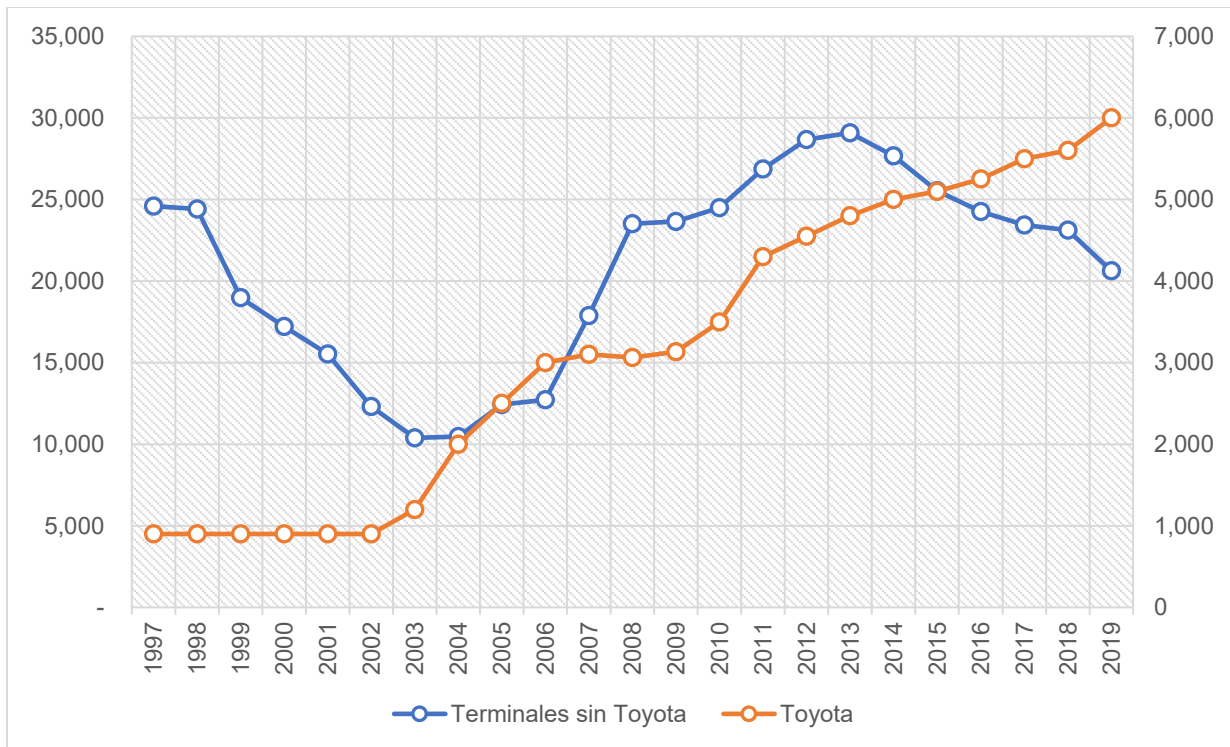
Hwpgv<gndqtck»p'r tqr kc"gp'dcug"c"CF GHC0'

Gráfico 0-2 – Exportaciones de vehículos de pasajeros y comerciales de Argentina (unidades) (1996-2019)



Hwpgv<gndqtck»p'r tqr kc"gp'dcug"c"CF GHC0'

Gráfico 0-3 - Empleo en el sector terminal de la industria automotriz de Argentina (1997-2019)



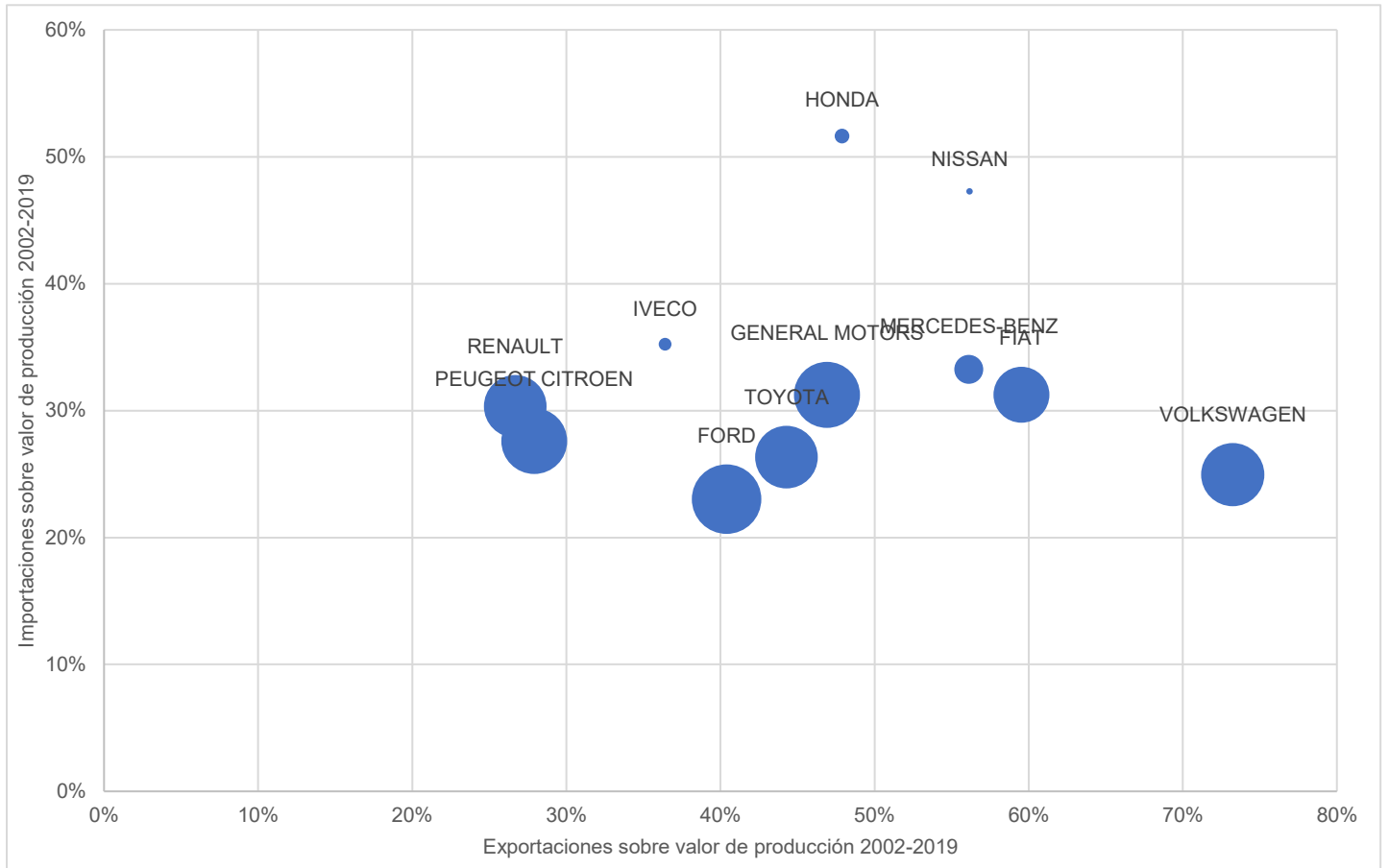
El gráfico muestra el empleo en el sector terminal de la industria automotriz de Argentina entre 1997 y 2019. Se observan dos líneas: una azul para 'Terminales sin Toyota' y una naranja para 'Toyota'. El eje Y izquierdo mide el empleo total (0 a 35,000) y el eje Y derecho mide el empleo de Toyota (0 a 7,000). El empleo total muestra una tendencia general a la baja hasta 2003, seguida de un crecimiento hasta 2013, y luego una disminución. El empleo de Toyota muestra un crecimiento constante desde 2003 hasta 2019.

Tabla 0-2 - Posición de Toyota en el ranking de las 200 empresas más grandes de Argentina

Año	Posición en el ranking
1997	104
1998	72
1999	92
2000	81
2001	81
2002	76
2003	57
2004	61
2005	16
2006	14
2007	19
2008	21
2009	17
2010	17
2011	20
2012	6
2013	7
2014	10
2015	17
2016	27
2017	11
2018	4
2019	3

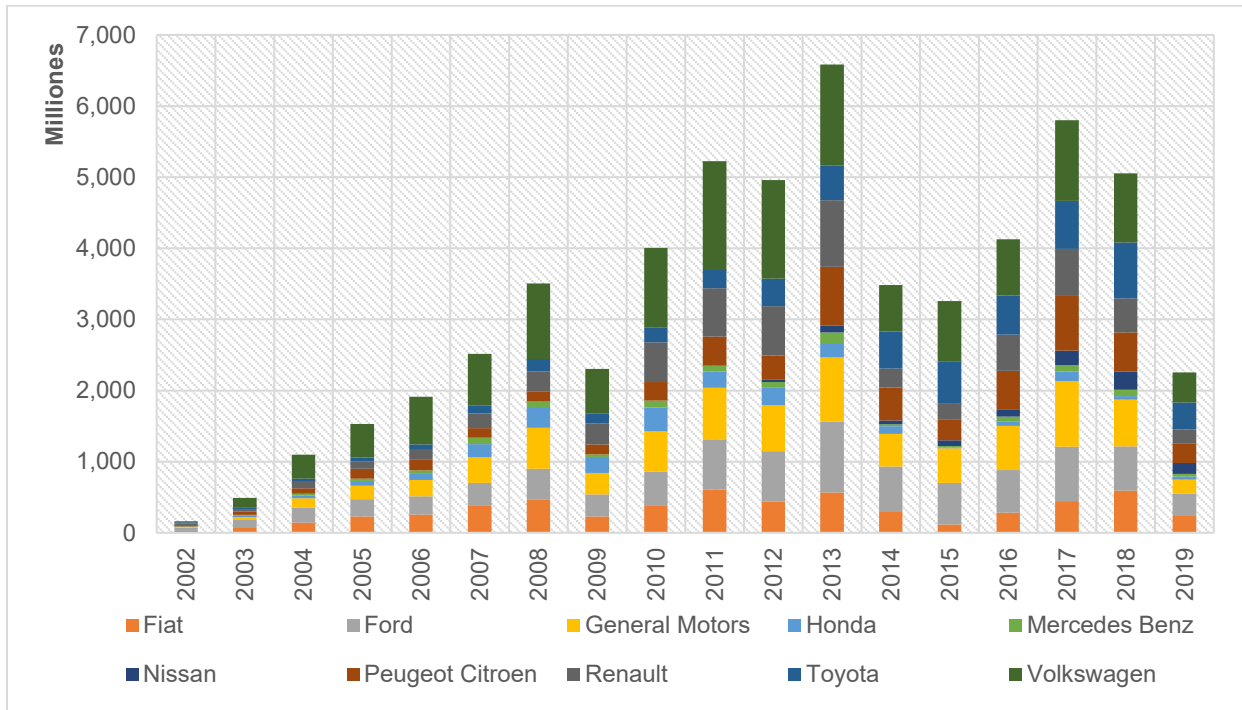
Hwpg<Tgxkuc"O gtecf q0'

Gráfico 0-4 - Promedios de las importaciones de autopartes sobre valor de producción entre 2002 y 2019 (eje Y), promedios de las exportaciones totales sobre el valor de la producción entre 2002 y 2019 (eje X) y cantidad de unidades producidas entre 2002 y 2019 (tamaño de la burbuja)



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Gráfico 0-5 - Importaciones de vehículos de pasajeros por terminal automotriz (millones de dólares CIF) (2002-2019)



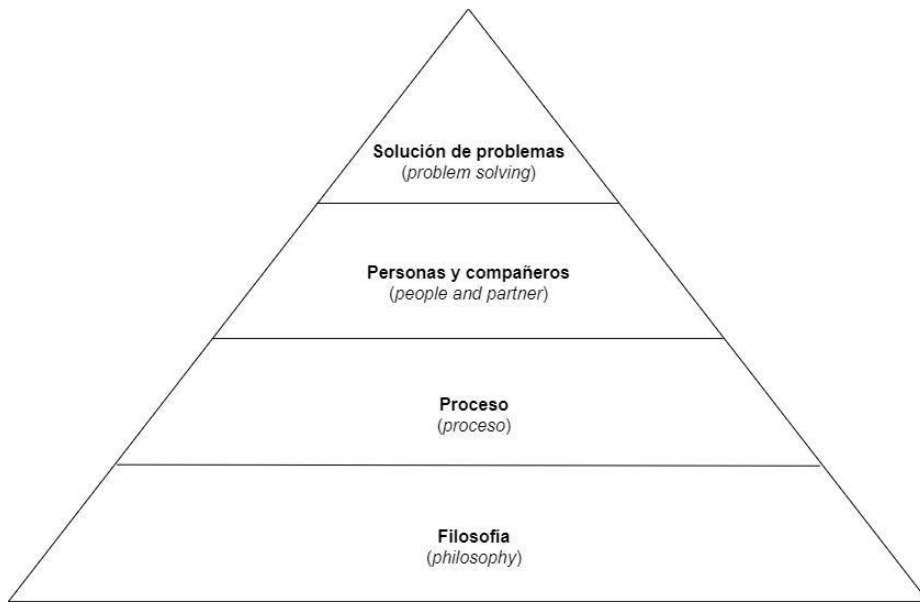
Importaciones de vehículos de pasajeros por terminal automotriz (millones de dólares CIF) (2002-2019)

Tabla 0-3 - Presidentes, vicepresidentes y presidentes del directorio de Toyota Motor Corporation

Nombre	Presidente del directorio	Vicepresidente	Presidente
Risaburo Toyoda	1° Presidente del directorio		1° Presidente
Kiichiro Toyoda			2° Presidente
Taizo Ishida	2° Presidente del directorio		3° Presidente
Fukio Nakagawa			4° Presidente
Eiji Toyoda	5° Presidente del directorio		5° Presidente
	Presidente del directorio honorario		
Shoichi Saito	3° Presidente del directorio		
Masaya Hanai	4° Presidente del directorio		
Shoichiro Toyoda	6° Presidente del directorio		6° Presidente
Shigenobu Yamamoto		ex Vicepresidente	
Gentaro Tsuji		ex Vicepresidente	
Tsutomu Oshima		ex Vicepresidente	
Tatsuro Toyoda		ex Vicepresidente	7° Presidente
Masami Iwasaki		ex Vicepresidente	
Hiroshi Okuda	7° Presidente del directorio		8° Presidente
Iwao Isomura		ex Vicepresidente	
Fujio Cho	8° Presidente del directorio	ex Vicepresidente	9° Presidente
Kosuke Ikebuchi		ex Vicepresidente	
Katsuaki Watanabe		ex Vicepresidente	10° Presidente
Katsuhiro Nakagawa		ex Vicepresidente	
Kazuo Okamoto		ex Vicepresidente	
Akio Toyoda			11° Presidente
Takeshi Uchiyamada		ex Vicepresidente	

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Figura 0-1 - Modelo de Toyota 4P de Liker (2003)



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Tabla 0-4 - Ventas de Toyota Corolla en el mundo (en unidades)

Año	Japón	EEUU	Can	México	Aus	Europa	Tailan	Filip	Pakistán	India	China Corolla EX	China Corolla	China Levin	Argentina	Colombia
1973		116,905													
1974		103,394													
1975		151,177													
1976		187,321													
1977		259,344													
1978		212,757													
1979		257,096													
1980		257,315													
...															
1983		178,572													
1984															
1985		168,378													
1986		159,458													
1987		164,3													
1988		216,677			23,586										
1989		199,975			22,13										
1990	300,008	228,211			29,981										
1991	275,019	199,083			26,227										
1992	260,777	196,118			23,825										
1993	237,537	193,749			23,777										
1994	228,66	210,926			21,915										
1995	235,626	213,64			23,372										
1996	223,244	209,048			23,212										
1997	238,098	218,461			22,319										
1998	196,498	250,501			25,079										

1999	160,677	249,128				28,387				8,268										
2000	162,87	230,156				30,576				8,778										
2001	236,507	245,023				30,813				8,116										
2002	226,222	254,36				34,948				6,151										
2003	198,904	325,477				36,128				12,867	8,175									
2004	173,301	333,161				39,053				20,321	10,195	45,476								
2005	149,81	341,29				46,415				23,002	8,974	67,392								
2006	143,176	387,388				46,256				30,527	7,168	78,973								
2007	147,069	371,39		10,284		47,792	85,407			35,762	6,463	63,999	65,844							
2008	144,051	351,007	57,736	9,37		47,901	119,12			33,64	8,102	52,247	165,271							
2009	90,178	296,874	53,933	7,58		39,013				26,76	8,604	57,109	157,457							
2010	111,265	266,082	38,68	9,085		41,632	51,189			43,51	10,041	82,743	172,053							
2011	70,758	240,259	36,663	10,306		36,087	69,889			41,111	9,283	120,962	170,467							
2012	80,459	290,947	40,906	12,767		38,799	63,481			46,207	6,912	124,531	151,887							
2013	101,664	302,18	44,449	10,956		43,498	67,987			32,608	4,106	147,921	146,48							
2014	114,331	339,498	48,881	13,553		43,735	36,595			29,087	6,748	85,835	171,487	49,112						
2015	109,027	363,332	47,199	13,215		42,073	69,194	20,966		51,398	7,574	46,34	254,301	125,699	15,829					
2016	84,77	378,21	45,626	13,228		40,33	67,876	18,052		57,452	4,86	17,091	307,36	159,071	15,786					
2017	77,466	329,196	50,332	10,135		37,353	60,936	19,179		52,676	4,242	2,829	336,763	172,626	17,23					
2018	89,91	303,732	48,796	6,351		35,23	55,686	21,914	1,801	51,412	3,286	374,4	192,697	15,582						
2019	104,406	304,85	47,596	11,594		30,468	133,597		1,261	56,72	1,422	357,798	213,905	9,045	1,592					
2020	118,276	237,178	37,156	8,127		25,882	137,209		1,121	22,14		350,31	222,361	4,336	2,455					

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Tabla 0-5 - Centros de I+D de Toyota en el mundo (2020)

País	Empresa	Centro de I+D	Ubicación	Actividades
Japón	Toyota Motor Corporation	Toyota Technical Center Headquarters	Aichi	Investigación básica de planificación de productos, ingeniería y evaluación de vehículos
		Toyota Technical Center Shimoyama	Aichi	Ingeniería de rendimiento de vehículos
		Toyota Technical Center Higashi-Fuji	Shizuoka	Ingeniería avanzada
		Tokyo Design Research & Laboratory	Tokyo	Diseño avanzado
		Toyota Technical Center Shibetsu	Hokkaido	Ingeniería de rendimiento de vehículos
		Otemachi Office	Tokyo	Investigación y desarrollo de inteligencia artificial
	Toyota Central Research & Development Laboratories, Inc.	Toyota Central Research & Development Laboratories	Aichi	Investigación básica
Toyota Research Institute - Advanced Development, Inc.	Toyota Research Institute - Advanced Development	Tokyo	Desarrollo de tecnología y software de conducción automatizada	
EEUU	Toyota Motor North America, Inc.	Toyota Technical Center Michigan	Michigan	Planificación de productos, ingeniería y evaluación de vehículos
		Toyota Technical Center TAPG	Arizona	Ingeniería de rendimiento de vehículos
		Toyota Technical Center Los Angeles	California	Evaluación del desempeño ambiental

	Toyota Research Institute, Inc.	Toyota Research Institute	California	Investigación en inteligencia artificial
	Calty Design Research, Inc.	Calty Design Research	California, Michigan	Diseño exterior, interior y de color
Europa	Toyota Motor Europe NV/SA	Toyota Technical Center Europe	Bélgica	Ingeniería y evaluación de vehículos
	Toyota Europe Design Development	Toyota Europe Design Development	Francia	Diseño exterior, interior y de color
	TOYOTA GAZOO Racing Europe GmbH	Toyota Technical Center TMG	Alemania	Base de desarrollo para vehículos de automovilismo
China	Toyota Motor Engineering & Manufacturing (China) Co., Ltd.	Toyota Technical Center China	Jiangsu	Tecnología, Ingeniería y Evaluación de Vehículos, Investigación Básica
	FAW Toyota Research & Development Co., Ltd.	FAW Toyota Research & Development	Tianjin	Ingeniería y evaluación de vehículos, Reg. Y Homolo
	GAC Toyota Motor Co., Ltd.	GAC Toyota Motor	Guangdong	Ingeniería y evaluación de vehículos, Reg. Y Homolo
Asia Pacifico	Toyota Daihatsu Engineering & Manufacturing Co., Ltd.	Toyota Daihatsu Engineering & Manufacturing	Tailandia	Ingeniería y evaluación de vehículos

<https://www.toyota.com/press/2018/04/20180420-01.html>

Tabla 0-6 - Accionistas de los principales accionistas de Toyota Motor Corporation (2020)

Custody Bank of Japan					
Nombre	Acciones (miles)	Descripción del accionista	1° Accionista del accionista	2° Accionista del accionista	3° Accionista del accionista
Sumitomo Mitsui Trust Holdings	680.000 (33%)	Compañía financiera con sede en Tokio. Holding japonés de Mitsui Trust Group. Siguiendo la red de mayores accionistas forma un círculo entre las mismas empresas financieras japonesas que se poseen unas a otras	The Master Trust Bank of Japan (8%)	Custody Bank of Japan (10%)	The Bank of New York (2%)
Mizuho Financial Group	550.800 (27%)	Holding bancario japonés. Mismo circuito. Red de empresas financieras japonesas.	The Master Trust Bank of Japan (8%)	Custody Bank of Japan (5%)	State Street Bank West Client (2%)
Resona Bank	340.000 (17%)	Mismo circuito. Red de empresas financieras japonesas.	The Master Trust Bank of Japan (7%)	Custody Bank of Japan (5%)	The Dai-ichi Life Insurance Company (5%)
The Dai-ichi Life Insurance Company	163.200 shares (8.0%)	Compañía de seguros de vida japonesa. Parte del Dai-ichi Life Holdings.	The Master Trust Bank of Japan (8%)	Custody Bank of Japan (6%)	Mizuho Bank (3%)
Asahi Mutual Life Insurance Company	102.000 shares (5.0%)	Compañía de seguros japonesa. Parte de Asahi Group Holding.	The Master Trust Bank of Japan (11%)	Custody Bank of Japan (4%)	The Dai-ichi Life Insurance Company (3%)

Toyota Industries Corporation					
Nombre	Acciones (miles)	Descripción del accionista	1° Accionista del accionista	2° Accionista del accionista	3° Accionista del accionista
Toyota Motor Corporation	76600 (23.5%)	Grupo Toyota	Custody Bank of Japan. Ltd. (11%)	Toyota Industries Corporation (7%)	The Master Trust Bank of Japan (7%)
Denso Corporation	29647 (9,1%)	Fabricante de componentes para la automoción: sistemas térmicos, powertrain, sistemas electrónicos, sistemas eléctricos, etc.	Toyota Motor Corporation (24%)	Toyota Industries Corporation (9%)	The Master Trust Bank of Japan (8%)
The Master Trust Bank of Japan	16556 (5%)	Banco fiduciario japonés dedicado exclusivamente a la administración de capitales	Mitsubishi UFJ Trust and Banking Corporation (46%)	Nippon Life Insurance (33%)	Meiji Yasuda Life Insurance Company (10%)
Towa Real Estate Co	16291 (5%)	Compañía inmobiliaria japonesa. Inversiones inmobiliarias, hotelería, etc. Parte del Grupo Toyota.	Custody Bank of Japan (14 %)	The Master Trust Bank of Japan (9%)	K.B. Kousan Co (8%)
Toyota Tsusho Corporation	15294 (5%)	Compañía del Grupo Toyota que tiene como objetivo hacer de soporte a Toyota Motor en el mundo. Tiene actividades diversificadas desde materias primas, logística, electrónica, química, maquinaria, etc.	Toyota Motor Corporation (22%)	Toyota Industries Corporation (11%)	The Master Trust Bank of Japan (10%)

The Master Trust Bank of Japan, Ltd.					
Nombre	Acciones (miles)	Descripción del accionista	1° Accionista del accionista	2° Accionista del accionista	3° Accionista del accionista
Mitsubishi UFJ Trust and Banking Corporation	55,8 (46%)	Es la división de banca fiduciaria del Mitsubishi UFJ Financial Group, un grupo de servicios financieros japonés.	The Master Trust Bank of Japan (8%)	Custody Bank of Japan (7%)	SSBTC Client Omnibus Account (3%)
Nippon Life Insurance Company	40,2 (33%)	Compañía de seguros japonesa. Es una mutual. No tiene accionistas.			
Meiji Yasuda Life Insurance Company	12 (10%)	Compañía de seguros de vida japonesa. Es una mutual, no tiene accionistas.			
The Norinchukin Trust & Banking Co	12 (10%)	Parte del Norinchukin Bank. Banco cooperativo japonés.			

Nippon Life Insurance Company
Compañía de seguros japonesa. Es una mutual.

No tiene accionistas					
JPMorgan Chase Bank					
Nombre	Acciones (miles)	Descripción del accionista	1° Accionista del accionista	2° Accionista del accionista	3° Accionista del accionista
The Vanguard Group	250,600 (8%)	Fondo de inversión de EEUU. No tiene accionistas, los dueños son los clientes que invierten en el fondo.			
SsgA Funds Management	141,747 (5%)	Es la división de inversión de State Street Corporation, un banco de EEUU.	The Vanguard Group (9%)	Dodge & Cox (6%)	BlackRock Fund Advisors (5%)
BlackRock Fund Advisors	130,400 (4%)	Compañía de inversión de EEUU.	The Vanguard Group (8%)	Capital Research & Management (5%)	SSgA Funds Management (4%)
Capital Research & Management	71,57 (2%)	Empresa de servicios financieros de EEUU. Gestora de fondos de pensión.			
Wellington Management	51,554 (2%)	Empresa de inversión y administración privada de EEUU.			

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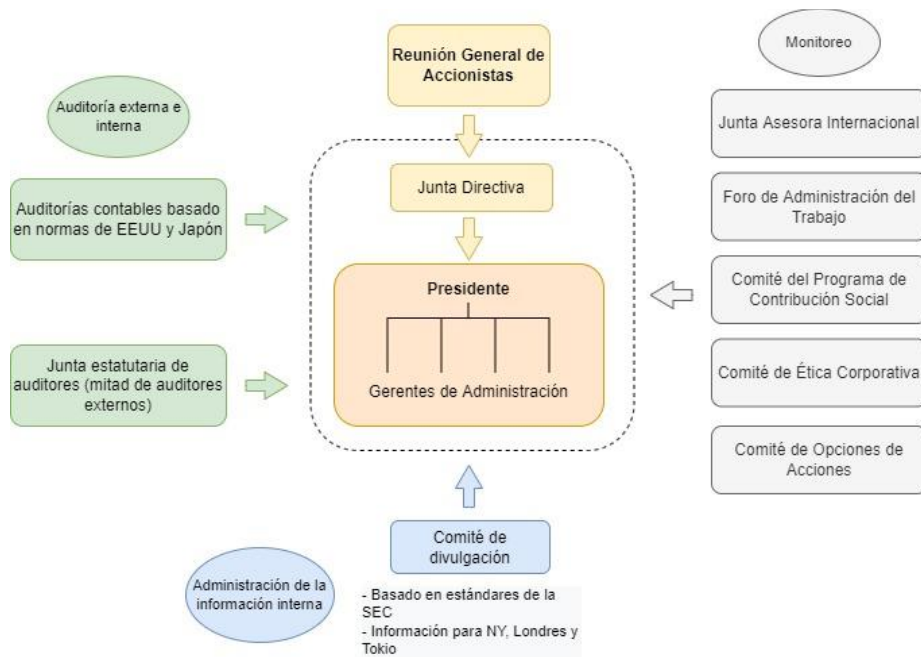
Tabla 0-7 – Producción, ventas, exportaciones e importaciones de vehículos en Sudáfrica por empresa y modelo (unidades) (año 2019)

Empresa	Modelo	Ventas Domésticas	Importados	Exportaciones	Re-exportado	Total
BMW	X3	2071	104	67523		69490
	3 Series	3528	3385	2		145
	BMW otro	7367	7367			
	Mini	2040	2040			
Bentley	Todos	69	69			
FiatChrysler	Todos	2240	2240		184	
Ford	Ranger/Everest	28585		66108		94693
	Ford otro	22242	22242			
Haval Motors (GWM)	Todos	10650	10650		220	
Honda	Todos	5557	5557		436	
Hyundai	Hyundai H100	2877	940			1937
	Hyundai otro	30534	30534			
Isuzu Motors SA	Isuzu KB/D Max	16156		3315		19471
	Isuzu otro	716	716		26	
Jaguar Land Rover	Todos	4041	4041			
JMC	Todos	435	435			
Kia	Todos	15774	15774			
Lamborghini		59	59			
Mahindra	Todos	7253	7253			
Maserati	Todos	81	81			
Mazda	Mazda BT-50	242				242
	Mazda otro	12218	12218			
Mercedes-Benz	C Class	4915	575	82507		86847
	Mercedes otro	10674	10674			
	Smart	85	85			

Mitsubishi	Todos	1911	1911	234
Nissan	Datsun	7744	7744	
	Hardbody/N P300	9067		6195 15262
	NP200	17955		188 18143
	Nissan otro	14768	14768	
Opel	Todos	2698	2698	
Peugeot Citroen	Todos	1358	1358	
Porsche	Todos	1496	1496	
Renault	Todos	27250	27250	
Scuderia SA	Todos	69	69	
Subaru	Todos	1050	1050	
Suzuki	Todos	15481	15481	11
Toyota	Corolla new	5752		1247 6999
	Corolla Quest	10043		3 10046
	Hilux/Fortuner	52578		51752 104330
	Quantum/Hi-Ace	17792	990	16802
	Toyota otro	39271	38067	1204
	Lexus	978	978	
VW	Polo Vivo	29618		1 29619
	Polo	21557		106328 127885
	VW otro	28895	28895	
	Audi	8495	8495	
Volvo	Todos	2335	2335	18

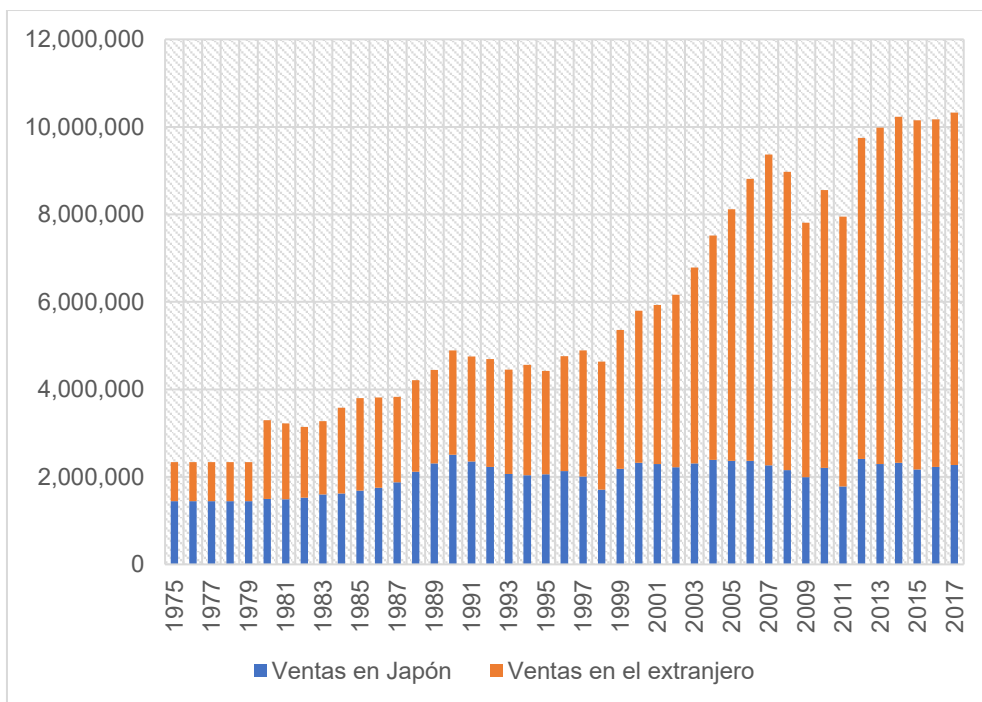
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Figura 0-2 – Estructura corporativa de Toyota Motor Corporation (año 2003)



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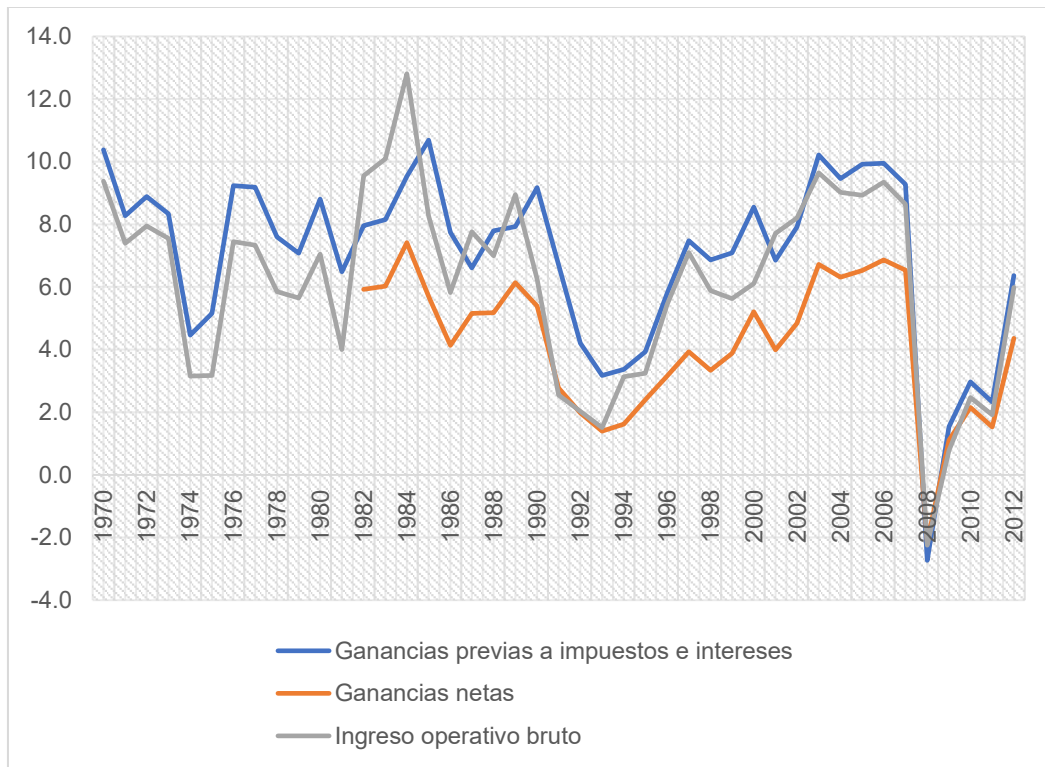
Gráfico 0-6 - Ventas anuales de Toyota en Japón y en el exterior (en unidades) (1975-2017)



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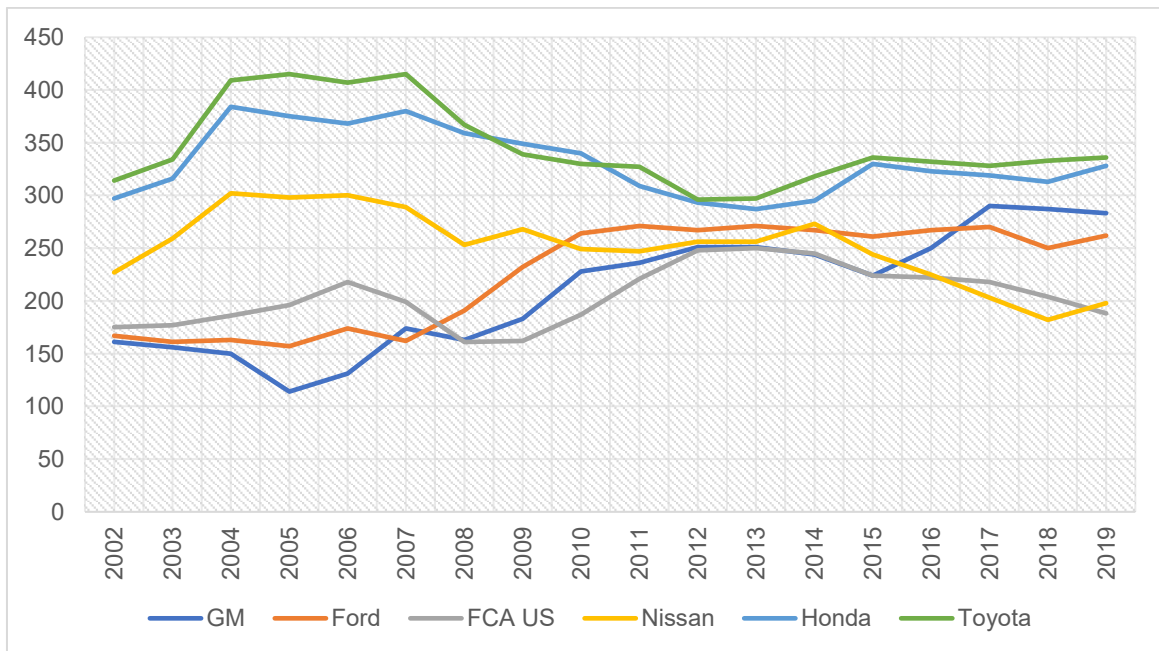
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Gráfico 0-7 - Rentabilidad del Grupo Toyota (porcentajes) (1970-2012)



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Gráfico 0-8 - Índice de relación de trabajo entre terminales y proveedores en EEUU de Planet Moran*



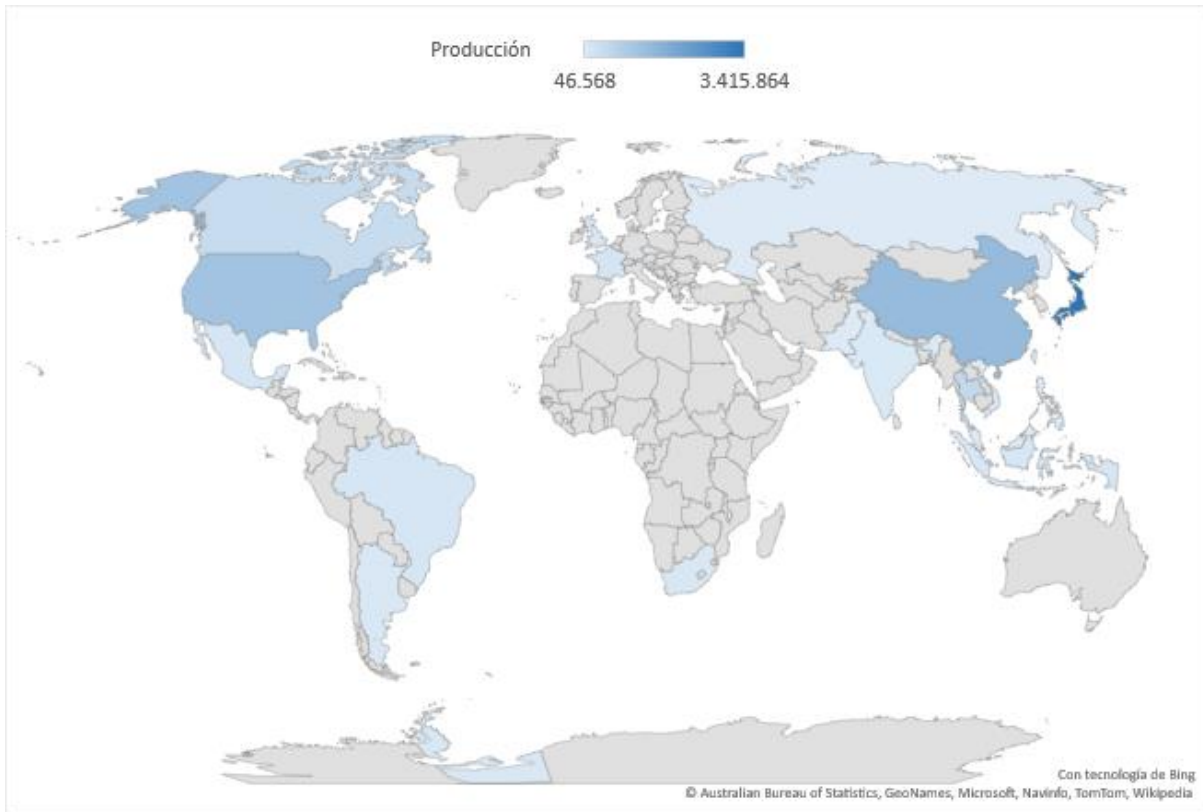
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Tabla 0-8 - Ranking de Toyota en el ranking de las principales empresas multinacionales del mundo por ingresos (1995-2019)

Año	Posición Ranking
1995	11
1996	8
1997	10
1998	11
1999	10
2000	8
2001	10
2002	10
2003	8
2004	8
2005	7
2006	8
2007	5
2008	5
2009	10
2010	5
2011	8
2012	10
2013	8
2014	9
2015	9
2016	8
2017	5
2018	6
2019	10

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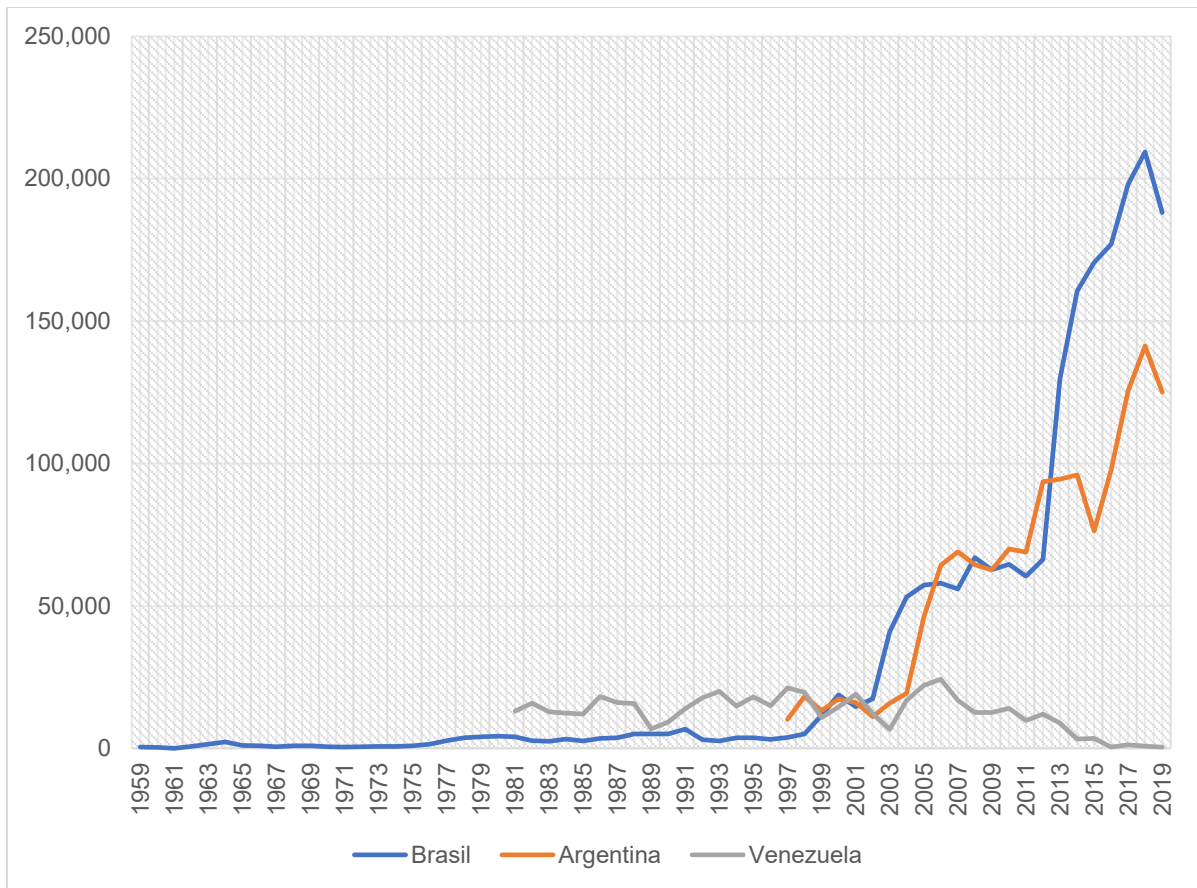
Gráfico 0-9 - Producción por país (2019) (en unidades)*



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f g'r tqf weekp0'

Gráfico 0-10 - Producción de Toyota Argentina, Brasil y Venezuela (unidades) (1959-2019)



El gráfico muestra la producción de Toyota en Argentina, Brasil y Venezuela desde 1959 hasta 2019. La producción en Brasil y Argentina muestra un crecimiento exponencial a partir de 2003, mientras que la producción en Venezuela permanece relativamente baja y estable.

Tabla 0-9 - Disposiciones institucionales nacionales y regionales utilizadas por Toyota

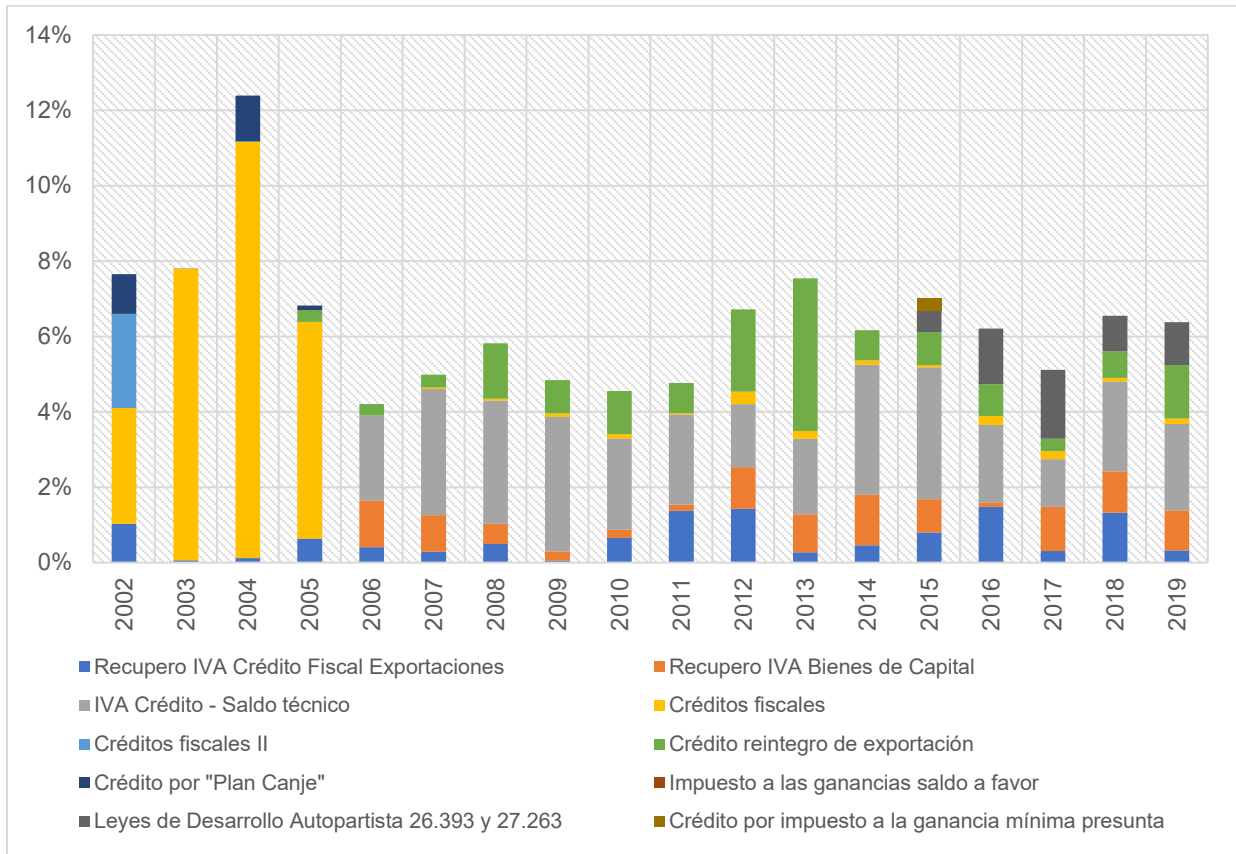
Año	Disposición	Descripción
1991	Acuerdo de Complementación Económica N° 14 entre Argentina y Brasil	Los productos amparados por este Régimen tendrán el tratamiento de "producto nacional" tanto en la República Argentina como en la República Federativa del Brasil y gozarán de: a) arancel de cero por ciento en sus importaciones las que quedarán eximidas, asimismo, de la aplicación de gravámenes adicionales de efectos equivalentes a los derechos aduaneros; y b) estarán eximidos de cualquier restricción o traba de naturaleza no arancelaria, excepto aquellas específicamente acordadas entre ambas Partes.
1991	Decreto Nacional 2677/91	Mecanismos de intercambios compensado, fijación de inversiones como exportaciones para el intercambio compensado, cupos de importación, entre otros.
1994	Decreto Nacional 895/94	Autorización pertinente para su radicación como productora de vehículos automotores conforme al régimen de la Industria Automotriz, establecido por la Ley N.21 932 y reglamentado por el Decreto N.2677 del 20 de diciembre de 1991 y su modificatorio el Decreto N.683 del 6 de mayo de 1994.
1996	Resolución 502/95 - Min. de Economía y Producción	"Régimen para la Instalación de Nuevas Plantas Industriales" para la importación de equipamiento de TMC y la empresa Tiaki-Sha de Japón para la utilización en su fábrica. A partir de esto se logró la importación de una gran cantidad de bienes con nulos cargos de Derechos de Importación (0%), Tasa Estadística (0%) y Comprobación de Destino (0,20%).
1998	Ley Nacional 24.402 / Resolución Nacional 422/98	Toyota solicita beneficios a partir del Régimen de Financiamiento del Impuesto al Valor Agregado (IVA) (Ley 24.402), a partir de lo cual logra una financiación de \$9.870.890.
1999	Resolución 65/99 - Min. de Economía y Producción	Entre 1997 y 1999 presenta distintos planes de intercambio compensado según el Decreto 2677/91 que obligaba a las terminales a mantener balances comerciales compensados. En 1999 presenta dicho plan para el período 1996-1999 en el cual se establecían exportaciones por u\$s477.000.000, inversiones por u\$s86.275.000 e importaciones por u\$s533.138.000 dando como resultado una balanza positiva por u\$s408.000.
1999	Resolución 27/99 - Min. de Economía y Producción	En 1999 además Toyota es incluida en el Régimen de Aduanas Domiciliarias establecido en la Resolución General AFIP 596/1999, a partir del cual Toyota estableció una oficina de Aduana en su planta en Zárate.
2000	Resolución 229/2000 - Min. de Economía y Producción	En el 2000 la empresa japonesa solicita la reducción del 3% de Derechos de Importación Extrazona.
2001	Decreto AFIP 730/2001	En el 2001 fue incluida en el Convenio para Mejorar la Competitividad y la Generación de Empleo de la AFIP a partir del Decreto AFIP 730/2001, con el cual se obtenían los beneficios de la exención del impuesto sobre los intereses pagados, el costo financiero del endeudamiento empresario y el impuesto a la Ganancia Mínima Presunta, y se conseguía un cómputo como crédito fiscal en Impuesto al Valor Agregado (IVA) de las

		contribuciones patronales (Boletín Oficial de la República Argentina, 30/7/2001).
2004	Resolución 119/2004 - Min. de Economía y Producción	En 2004 Toyota pide ser incluida en el Régimen de Importación de Bienes Integrantes de "Grandes Proyectos de Inversión" (Resolución N° 256/2000) para la importación de bienes sin derechos de importación que forman parte, exclusivamente, de una nueva línea de producción completa y autónoma para la fabricación de la SUV SW4 por un monto de 64 millones de dólares FOB.
2004	Resolución 30/2004 - Min. de Economía y Producción	Toyota es incluido en el Régimen de Aduana en Factoría (RAF).
2005	Resolución 238/2005 - Min. de Economía y Producción	Programa de Estímulo para las Inversiones del Sector Automotriz para las empresas que hubieran adherido al Régimen de Renovación del Parque Automotor, instituido por el Decreto N° 35/99. Toyota adhiere a este régimen y recupera \$13 millones por la inversión en el plan IMV al 31/3/2007 (Balance TASA, 12/9/2007).
2008	SICPME 147/2008	Reintegro de compras de autopartes nacionales por nuevas inversiones en el marco del Decreto DNU 774/2005.
2008	Resolución 38/2009 - Min. de Economía	Se excluye a Toyota Compañía Financiera de la aplicación del Decreto 616/2005 para la entrada de u\$s 15 millones provenientes de sus filiales norteamericanas Toyota Motor Credit Corporation y Toyota Financial Services America Corporation.
2011	Decreto Nacional 774/05	Gracias al régimen, Toyota Argentina recibió un reintegro monetario equivalente a \$10.214.573.
2012	Decreto Nacional 774/05	Toyota Argentina recibió un reintegro monetario equivalente a AR\$ 2.461.781.
2012	Ley Nacional 10.547	Toyota Argentina S.A. ha sido beneficiada con el Régimen de Promoción Industrial establecido por la Ley 10.547 por la ampliación de la planta fabril ubicada en la ciudad de Zárate. A raíz de ello, la empresa se encuentra eximida del pago del impuesto sobre los Ingresos Brutos, en un 100% por un plazo de 10 años, sobre el aumento de facturación a que diera lugar el total de la producción que se genere en la planta promocionada.
2014-2015-2016	Créditos FONDEAR	Es un Fondo Fiduciario Público de alcance nacional, creado con el objetivo de dar financiamiento flexible con tasas y plazos más ventajosos que los de mercado. Estaba destinado a sectores estratégicos de la economía. Toyota recibió en noviembre de 2014 \$600 millones y en mayo de 2015 otros \$600 (aproximadamente u\$s70 millones cada uno al tipo de cambio oficial de cada desembolso). Y otro de \$440 millones en abril de 2016 (u\$s31 millones al tipo de cambio del mes de desembolso). Los préstamos fueron independientes a un plazo de 5 años con 3 años de gracia sobre el capital, con una tasa fija del 19% para los primeros 2 años y luego variable con un tope mínimo de 14% y un máximo de 25%.
2014	Resolución N° 557/2014 - Min. del Interior	Lanzamiento de líneas de financiación con tasas subsidiadas para la compra de vehículos nacionales (PROCREAUTO).
2014	Resolución 328/2014 - Ente Nacional	Entrada de Toyota a Gran Usuario dentro del Mercado Eléctrico: Grandes Usuarios Mayores (GUMA).

	Regulador de la Electricidad	
2015	Resolución 649/2015 - Min. de Industria - Ley Nacional 26.393	Recupero de \$192.489.000 por compras de autopartes ejercicio 2015.
2016	Ley Nacional 27.263	Régimen de beneficios e incentivos para el desarrollo y fortalecimiento de la producción nacional de autopartes.
2017	Resolución Conjunta 7 - E/2017 - Sec. de Comercio y de Industria	Beneficios establecidos en el Régimen de Importación de Bienes Integrantes de "Grandes Proyectos de Inversión" conforme a la Resolución N° 256 de fecha 3 de abril de 2000 del ex Min. de Economía: importación de bienes nuevos destinados a la instalación de una línea de ensamblado de tapa de cilindro de motores.
2017-2019	Disposición 9-E/2017 - Resolución 20/2018, Disposición 670/2019 - Min. de Producción	Reducción arancelaria para la importación de vehículos con energías alternativas.
2019	Resolución Conjunta 93/2019 - Secretaría de Comercio Exterior e Industria	Beneficios establecidos en el Régimen de Importación de Bienes Integrantes de "Grandes Proyectos de Inversión" por ¥ 1.147.796.759.

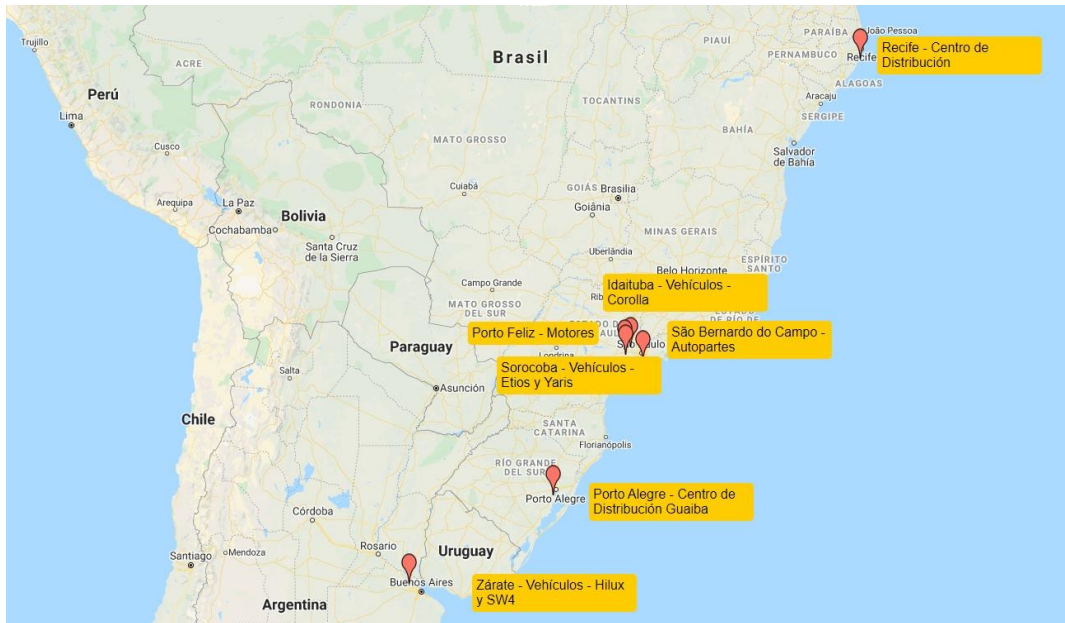
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Gráfico 0-11 – Incentivos del gobierno nacional (créditos corrientes) como porcentaje de ventas netas de TASA en cada año (porcentajes) (2002-2019)



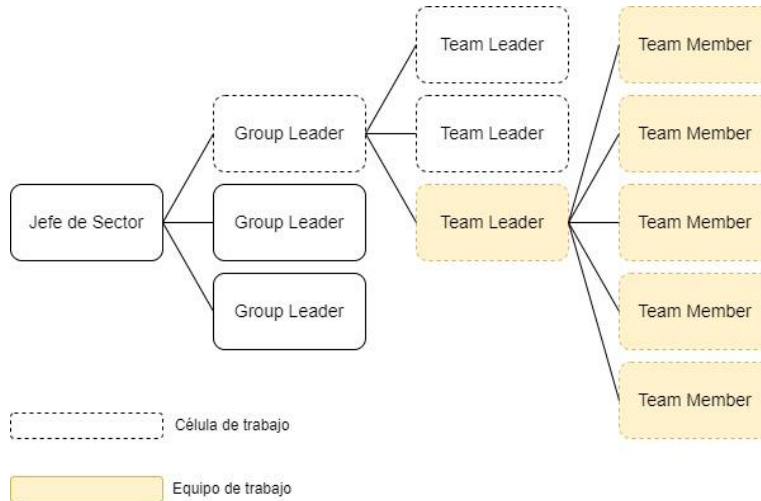
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Imagen 0-1 - Plantas de producción y centros de distribución de Toyota Argentina y Brasil (año 2019)



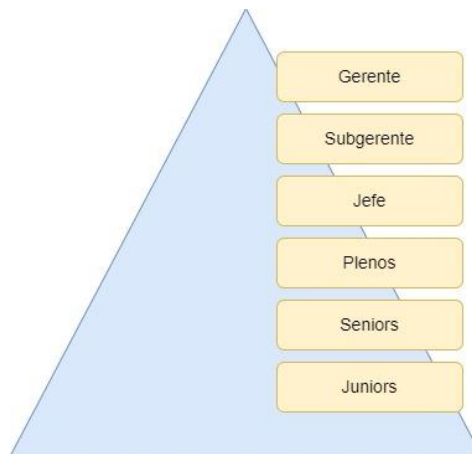
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Figura 0-3 – Escala jerárquica operarios TASA



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Figura 0-4 – Escala jerárquica profesionales TASA



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Tabla 0-10 – Modelos producidos por cada empresa en Argentina y Brasil en 1997

Empresa	País	Modelo producido	Tipo de vehículo
Agrale	Brasil	TX	Camión
		MA	Ómnibus
Chrysler	Argentina	Cherokee	Utilitario liviano
	Brasil	Dodge Dakota	Utilitario liviano
Fiat	Argentina	Uno	Vehículo de pasajeros
		Duna	Vehículo de pasajeros
		Palio	Vehículo de pasajeros
		Siena	Vehículo de pasajeros
	Brasil	Uno	Vehículo de pasajeros
		Duna	Vehículo de pasajeros
		Palio	Vehículo de pasajeros
		Siena	Vehículo de pasajeros
		Marea	Vehículo de pasajeros
		Tempra	Vehículo de pasajeros
		Fiorino	Utilitario liviano
		Strada	Utilitario liviano
		Uno Furgón	Utilitario liviano
Ford	Argentina	Escort	Vehículo de pasajeros
		Ranger	Utilitario liviano
	Brasil	Fiesta	Vehículo de pasajeros
		Ka	Vehículo de pasajeros
		Courier	Utilitario liviano
		F-1000	Utilitario liviano
		F-250	Utilitario liviano
		Cargo (distintos modelos)	Camión
		F-350	Camión
		F-4000	Camión
		F-12000	Camión
		F-14000	Camión
		F-16000	Camión
		B-1618	Ómnibus
B-1621	Ómnibus		
General Motors	Argentina	Corsa	Vehículo de pasajeros
		Silverado	Utilitario liviano
		Grand Blazer	Utilitario liviano
	Brasil	Corsa	Vehículo de pasajeros

		Ipanema	Vehículo de pasajeros
		Kadett	Vehículo de pasajeros
		Omega	Vehículo de pasajeros
		Blazer	Utilitario liviano
		Corsa pick up	Utilitario liviano
		D 20	Utilitario liviano
		S 10	Utilitario liviano
		Silverado	Utilitario liviano
		6-100	Camión
		6-150	Camión
		12-170	Camión
		14-190	Camión
		16-220	Camión
Honda	Brasil	Civic	Vehículo de pasajeros
Mercedes Benz	Argentina	Sprinter	Camión
		OH	Ómnibus
		O	Ómnibus
	Brasil	Distintos modelos	Camión
		LO (distintos modelos)	Ómnibus
		OH (distintos modelos)	Ómnibus
Navistar	Brasil	Distintos modelos	Camión
Peugeot	Argentina	306	Vehículo de pasajeros
		405	Vehículo de pasajeros
		504	Vehículo de pasajeros
		504 pick up	Utilitario liviano
		Partner	Utilitario liviano
Renault	Argentina	Clío	Vehículo de pasajeros
		9	Vehículo de pasajeros
		19	Vehículo de pasajeros
		Megane	Vehículo de pasajeros
		Trafic	Utilitario liviano
	Brasil	Megane	Vehículo de pasajeros
Scania	Argentina	Distintos modelos	Camión
	Brasil	Distintos modelos	Camión
		Distintos modelos	Ómnibus

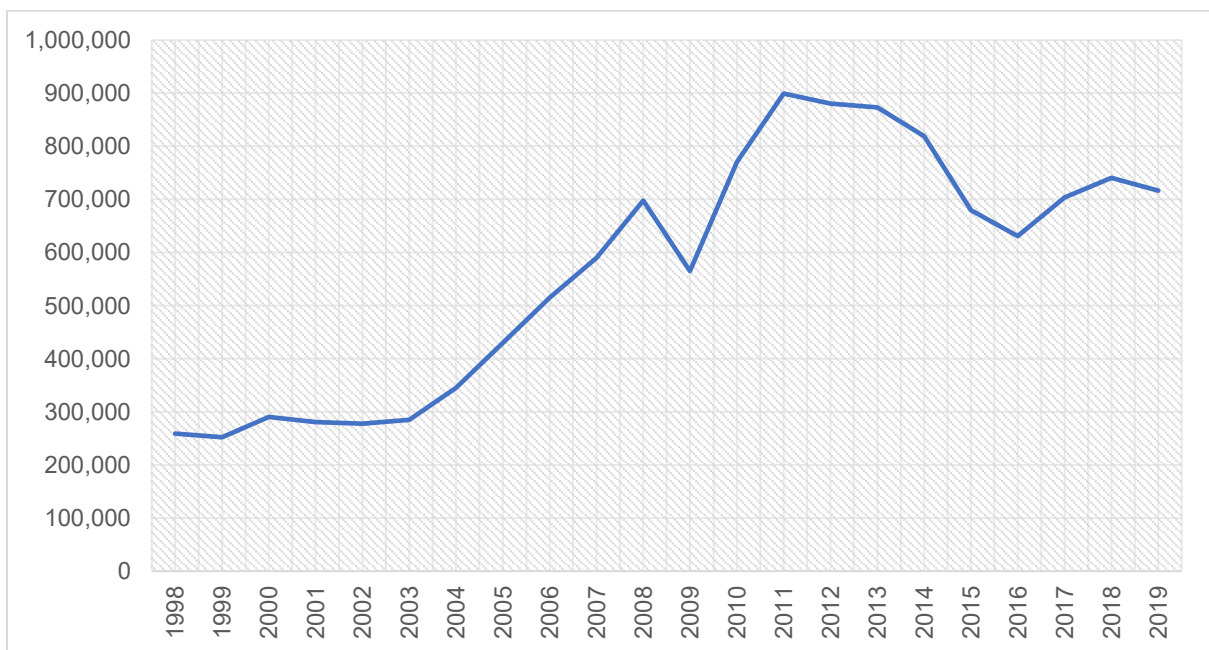
Toyota	Argentina	Hilux	Utilitario liviano
	Brasil	Corolla	Vehículo de pasajeros
		Bandeirante	Utilitario liviano
Volkswagen	Argentina	Gol	Vehículo de pasajeros
		Polo	Vehículo de pasajeros
		Gacel	Vehículo de pasajeros
		Voyage	Vehículo de pasajeros
	Brasil	Gol	Vehículo de pasajeros
		Parati	Vehículo de pasajeros
		Polo	Vehículo de pasajeros
		Quantum	Vehículo de pasajeros
		Santana	Vehículo de pasajeros
		Kombi	Utilitario liviano
		Saveiro	Utilitario liviano
		Distintos modelos	Camión
		Distintos modelos	Ómnibus
Volvo	Brasil	Distintos modelos	Camión
	"	Distintos modelos	Ómnibus

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Gráfico 0-12 - Valor agregado de las actividades de agricultura, caza, silvicultura, pesca, minería y energía en América Latina (millones de dólares corrientes) (1998-2019)



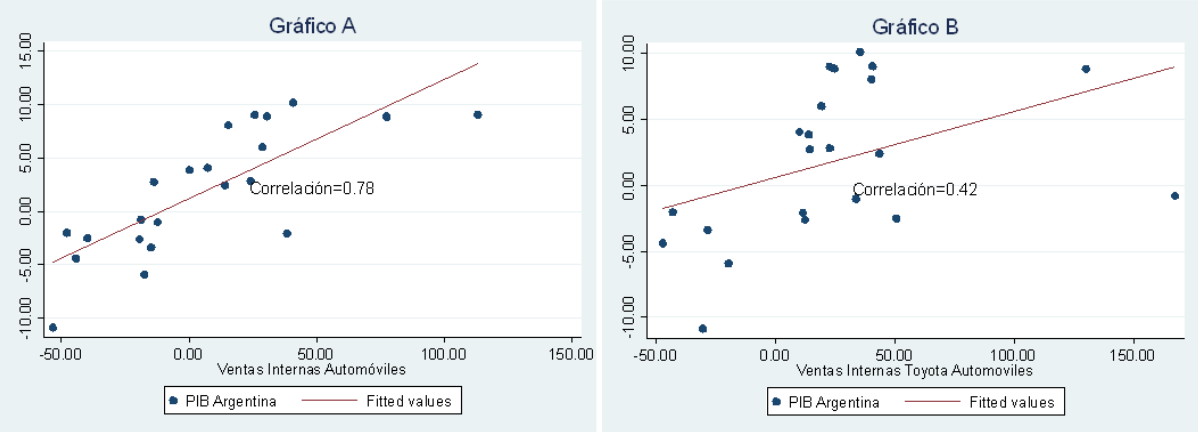
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Tabla 0-11 - Modelos nacionales y rangos de precios (miles de pesos) (año 2019)

Marca	Modelo	Rango de precio
Fiat	Cronos	886-1.061
Ford	Nuevo Focus	1.090-1.463
	Ranger	1.550-3.029
General Motors	Cruze	1.097-1.650
Honda	HRV EX CVT	1.472
	HRV EXL CVT	1.643
	HRV LX CVT	1.355
Nissan	Frontier	1.306-2.502
Peugeot	308	1.212-2.287
Citroen	408	1.372-1.429
	C4 Lounge	1.078-1.471
	Partner	836-1.200
	Berlingo	830-1.112
Renault	Kangoo	907-1.886
	Logan	738-876
	Sandero	746-990
Toyota	SW4	2.343-2.980
	Hilux	1.500-2.600
Volkswagen	Suran	900-1.000
	Amarok	1.420-3.203

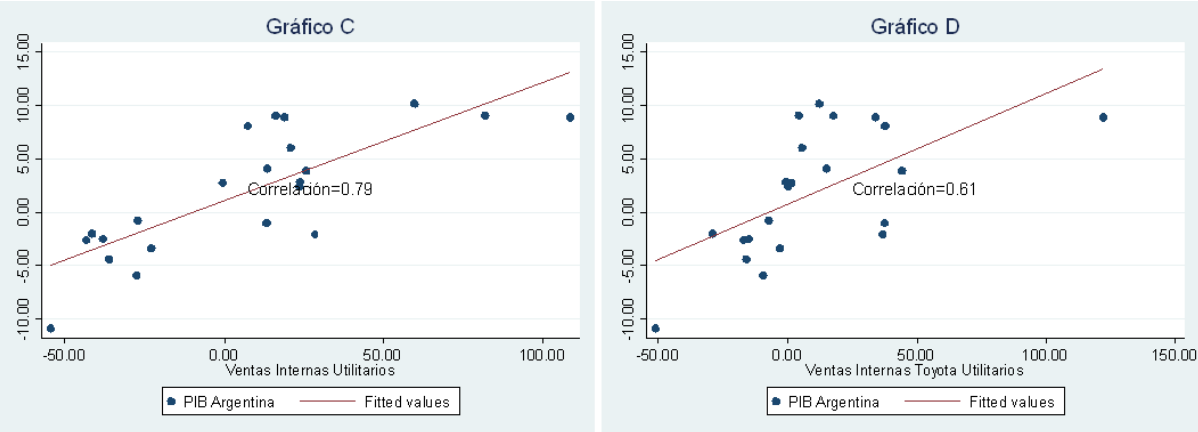
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Gráfico 0-13 - Correlaciones entre variación del PIB de Argentina y ventas de automóviles en el mercado interno de todas las empresas excepto Toyota (A) y sólo Toyota (B) (1998-2019)*



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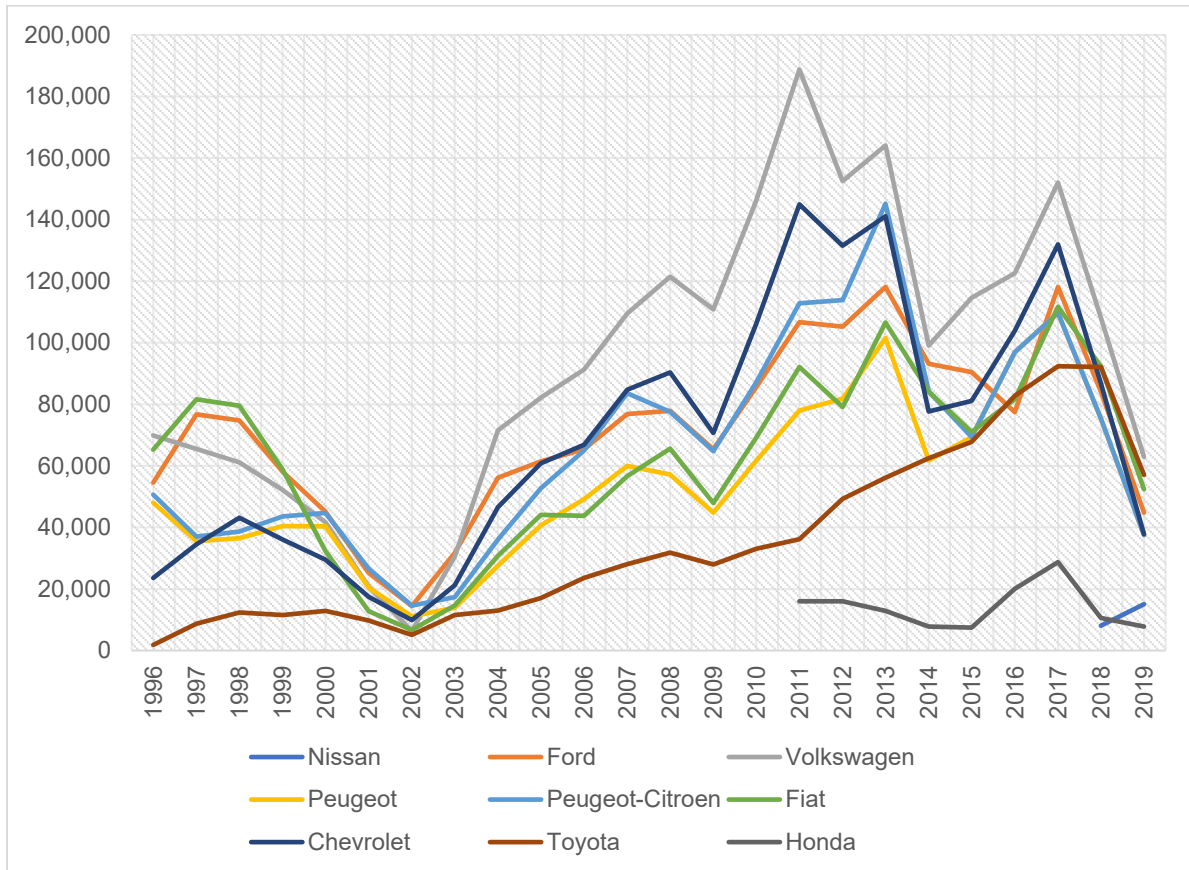
Gráfico 0-14 - Correlaciones entre variación del PIB de Argentina y ventas de utilitarios en el mercado interno de todas las empresas excepto Toyota (C) y sólo Toyota (D) (1998-2019)*



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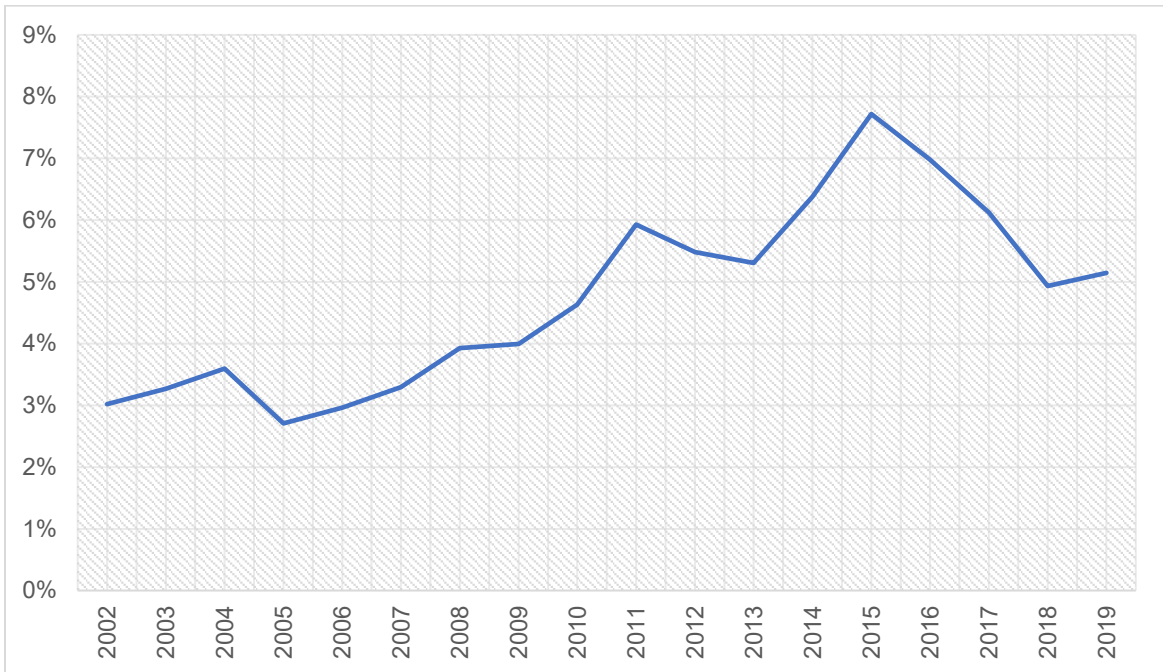
**Gráfico 0-15 - Ventas en el mercado interno argentino de vehículos por empresa (unidades)
(1996-2019)**



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Gráfico 0-16 – Participación de sueldos y jornales sobre ventas netas de TASA de cada año (porcentajes) (2002-2019)



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Tabla 0-12 - Directivos de TASA (1995-2019)

Directivos Toyota Argentina	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Presidente	Alberto A. Fernandez	Tsuneo Arima	Tsuneo Arima	Tsuneo Arima	Tsuneo Arima	Tomio Katsuta	Tomio Katsuta	Tomio Katsuta	Hiroyuki Okabe	Hiroyuki Okabe	Hiroyuki Okabe	Aníbal Ramón Borderes	Aníbal Ramón Borderes
Vicepresidente	Tsuneo Arima												
Director Gerente		Tomio Katsuta	Tomio Katsuta	Tomio Katsuta	Tomio Katsuta	Tetsuo Matsuda	Ichiyoshi Tsuchiya						
		Osamu Ishikawa	Osamu Ishikawa	Osamu Ishikawa	Tetsuo Matsuda	Kazuhiro Yahashi	Masashi Onizawa						
			Tetsuo Matsuda	Tetsuo Matsuda	Kazuhiro Yahashi		Kazuhiro Yahashi						
Directores Titulares	Oscar M. Salvi	Toshiaki Taguchi	Toshiaki Taguchi	Toshiaki Taguchi	Toshiaki Taguchi	Zenji Yasuda	Yukitoshi Funo	Mitsuo Kinoshita	Tomio Katsuta	Tonio Katsuta	Tonio Katsuta	Shozo Hasebe	Shozo Hasebe
	Alberto F. Ibáñez	Alberto A. Fernández	Alberto A. Fernández	Alberto A. Fernández	Alberto A. Fernández	Alberto A. Fernández		Yukitoshi Funo	Hiromi Ito	Hiromi Ito	Juan Nicolás Abuin	Shunichi Takahashi	Toshikazu Ishida
	Tomio Katsuta							Masashi Onizawa			Hiromi Ito	Juan Nicolás Abuin	Juan Nicolás Abuin
	Horacio E. Grudny							Hiromi Ito				Hiromi Ito	Takato Hijikata

	Osamu Ishikawa											Atsushi Niimi	Koichi Ina
	Motosuke Tominaga											Masanao Tomozoe	Masanao Tomozoe
CEO América Latina - Director Titular													
Directores Suplentes	Akira Takami	Akira Takami	Haruo Murase	Haruo Murase	Yasuteru Otani	Yasuteru Otani	Yasuteru Otani	Satoshi Yamamoto	Satoshi Yamamoto	Toshikazu Ishida	Anibal Ramón Borderes	Toshikazu Ishida	Harumi Iuchi
	Alberto A. Di Cío	Alberto A. Di Cío	Takashi Taguchi	Masuna o Matsunaga	Masuna o Matsunaga	Masuna o Matsunaga	Satoshi Yamamoto	Minoru Nakagawa	Minorou Nakagawa	Satoshi Yamamoto	Toshikazu Ishida		
	Alfredo P. Sastre	Alfredo P. Sastre									Toshiaki Tachibana		
	Luis E. Luceo	Luis E. Luceo											
	Enrique Magnasco												
	Ricardo Avellana												
	Horacio Merini												
	Raúl Pérez												

Directivos Toyota Argentina	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Presidente	Aníbal Ramón Borderes	Aníbal Ramón Borderes	Aníbal Ramón Borderes	Daniel Herrero	Daniel Herrero	Daniel Herrero	Daniel Herrero	Daniel Herrero	Daniel Herrero	Daniel Herrero	Daniel Herrero	Daniel Herrero
Vicepresidente												
Director Gerente												
Directores Titulares	Shozo Hasebe	Shozo Hasebe	Shozo Hasebe	Shunichi Nakanishi	Shunichi Nakanishi	Shunichi Nakanishi	Gustavo Salinas	Gustavo Salinas	Gustavo Salinas			
	Toshikazu Ishida	Susumu Kanada	Susumu Kanada	Susumu Kanada	Susumu Kanada	Susumu Kanada	Takeshi Yamakawa	Takeshi Yamakawa	Masahiro Inoue	Masahiro Inoue	Masahiro Inoue	Masahiro Inoue
	Juan Nicolás Abuin	Juan Nicolás Abuin	Juan Nicolás Abuin	Gustavo Salinas	Yukio Kuritani	Yukio Kuritani	Koji Kondo	Koji Kondo	Takeshi Yamakawa	Ichiro Ota	Ichiro Ota	Ichiro Ota
	Takato Hijikata	Daniel Herrero	Daniel Herrero	Yukio Kuritani	Hisayuki Inoue	Hisayuki Inoue	Toshiro Hidaka	Toshiro Hidaka		Mariano Barriola	Mariano Barriola	Mariano Barriola
	Koichi Ina	Osamu Nagata	Hisayuki Inoue	Hisayuki Inoue	Takeshi Numa	Masashi Asakura	Masashi Asakura	Masashi Asakura	Masashi Asakura	Masashi Asakura	Gustavo Salinas	Gustavo Salinas
	Masanao Tomozoe	Hisayuki Inoue	Hirofumi Muta	Takeshi Numa	Gustavo Salinas	Hitoshi Takahashi	Hitoshi Takahashi	Hitoshi Takahashi	Hitoshi Takahashi	Takeshi Yamakawa	Akira Nagata	Akira Nagata
						Gustavo Salinas						
CEO América Latina - Director Titular							Stephen St. Angelo Jr.	Stephen St. Angelo Jr.	Stephen St. Angelo Jr.	Stephen St. Angelo Jr.	Stephen St. Angelo Jr.	
Directores Suplentes	Harumi Iuchi	Harumi Iuchi	Yukio Kuritani	Yoshikatsu Kaneyashiki	Yoshikatsu Kaneyashiki	Kenji Mochida	Kenji Mochida	Kenji Mochida	Kenji Mochida	Tatsuya Shibata	Misa Sugiura	Rafael Chang Miyasaki

			Yoshikats u Kaneyashi ki										
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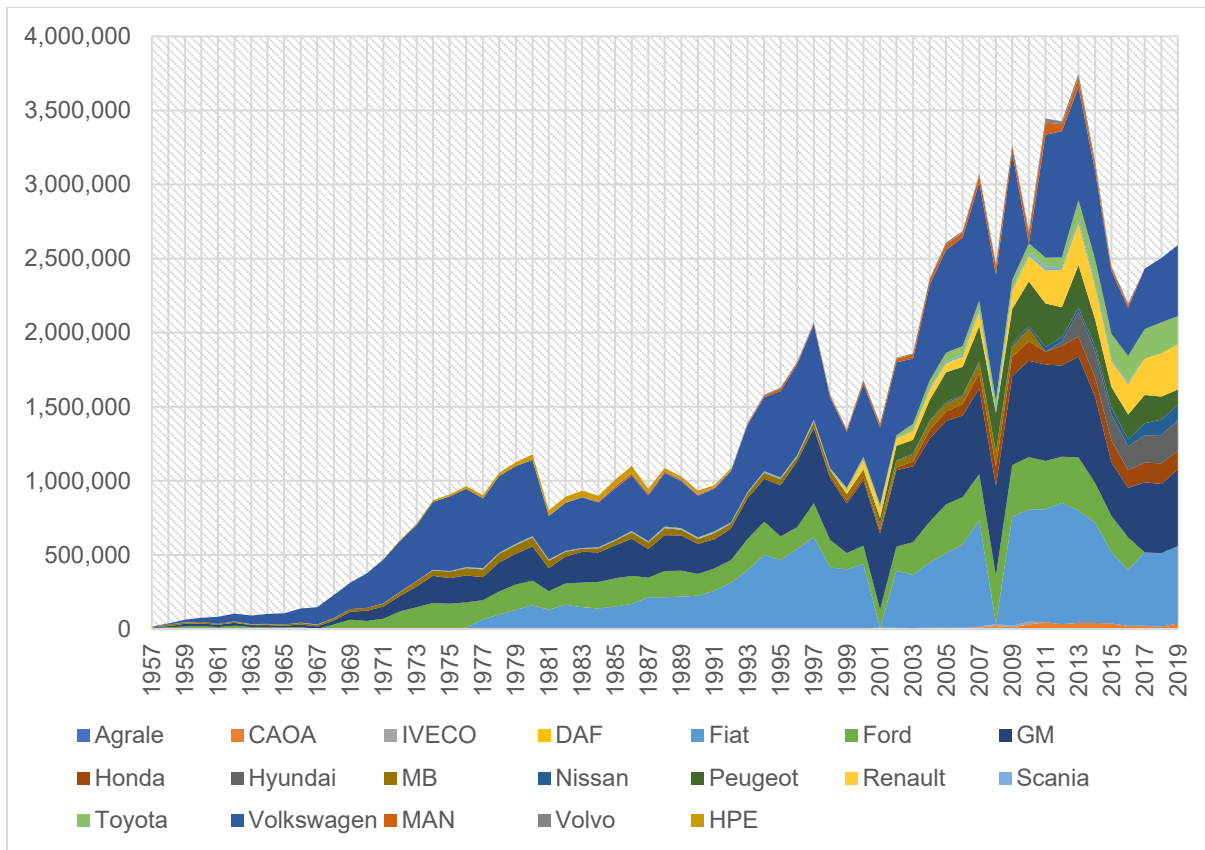
Fuente: elaboración propia en base a balances TASA y reportes de Sustentabilidad.

Imagen 0-2 - Ubicación de la planta de Toyota Argentina, puerto Terminal Zárate y la intersección de las Rutas Nacionales 9 y 12



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Gráfico 0-17 - Producción anual de vehículos por compañía en Brasil (unidades) (1957-2019)



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Tabla 0-13 - Principales autopartistas de Toyota Argentina (2020)

Empresa	Nacionalidad	Parte de Grupo Toyota	Tipo de producto	Localizado por Toyota	Produce para otras terminales	Cantidad de plantas	Provincia
AMIC	Argentina	No	Abrazaderas para elásticos, bulones y piezas para suspensión de automotores pesados y utilitarios.	-	-	1	PBA
Araco	Japón	No	Asientos y paneles de interior.	Sí	No	2	PBA
Compañía Regional de Aceros Forjados Mercedes	Argentina	No	Piezas forjadas y mecanizadas.	-	Sí (Fiat, Iveco, Peugeot, Renault, Scania, Volkswagen y autopartistas)	1	San Luis
Cozzuol	Argentina	No	Paragolpes, componentes de plástico.	-	Sí (Ford, General Motors Brasil y Argentina, Peugeot Citroën, Renault)	1	PBA
Dana	EEUU	No	Barras de dirección, brazos Pitman, brazos de suspensión, cardanes, componentes cardánicos, conjuntos cardánicos, crucetas, ejes motrices y directrices completos para ómnibus y camiones, ejes para tractores agrícolas, motoniveladoras, etc., y sus partes, ejes traseros, extremos de dirección, rótulas de suspensión.	No	Sí (Ford, Iveco, Mercedes Benz, Volkswagen, maquinaria agrícola)	2	PBA y San Luis
Dema	Argentina	No	Accesorios de fundición maleable para la conducción de agua y gas.	No	-	2	PBA

Denso	Japón	Sí	Calefactores, condensador de aire acondicionado, depósitos de líquido refrigerante, piezas plásticas, radiadores, radiadores de calefacción, sistemas de climatización y sus componentes, tubos de aluminio para alta presión.	Sí	Sí (Fiat, Nissan, Peugeot Citroën, Renault y autopartistas)	1	Córdoba
Die Tech	EEUU	No	Conjuntos y subconjuntos de chapa, conjuntos y subconjuntos soldados, estampados, estructuras de asientos, matrices, piezas estampadas, piezas estampadas para sistemas anti vibratorios, piezas estructurales de asientos, piezas estructurales de carrocería.	-	Sí (Fiat, Ford, Peugeot, Volkswagen, autopartistas y reposición)	1	PBA
ELHYMEC	Argentina	No	Bisagras de capot, bisagras de puertas, conjunto freno de estacionamiento, palanca de cambios, palanca de freno de estacionamiento, piezas estampadas, tubos de conducción de fluidos.	-	Sí (Fiat, Ford, General Motors, Peugeot y autopartistas)	1	PBA

Establecimientos Metalúrgicos Unidos (EMU)	Argentina	No	Bujes, campanas de freno, carcasas, ejes, maza de rueda delantera, maza de rueda trasera, mecanizado de Piezas, forja, aluminio, fundición de hierro, barras de acero, múltiples de escape, piñón y corona, poleas, puntas de eje, soporte de caja, soportes de alternador, soportes de motor, soportes de punta de eje, tuercas, volante de motor.	No	Sí (Ford, General Motors Argentina y Brasil, Mercedes Benz, Renault, Scania, Volkswagen y autopartistas)	1	CABA
Establecimientos Romet	Argentina	No	Alza cristales eléctricos, alza cristales manuales, cerraduras, columnas de dirección, deflector de calor, ganchos (traba cerradura), palanca de cambios, palanca de freno de estacionamiento, piezas estampadas.	No	Sí (Ford Argentina y Brasil, Peugeot y Volkswagen Brasil)	2	PBA
Esteban Cordero	Argentina	No	Piezas de carrocería estampadas en frío y caliente, soldadura y armado de conjuntos en acero, herramientas de mano y matricería.	No	No. A otras fabricantes de motos (Honda y Yamaha)	2	PBA
F2J Lighting Cordoba	Francia	No	Faros Auxiliares, faros antiniebla, faros indicadores de dirección, faros principales, faros traseros, luces de interior.	-	Sí (Fiat, Ford, General Motors, Peugeot, Renault, Volkswagen)	1	Córdoba
Faurecia Sistemas de Escape	Francia	No	Catalizadores, caños de escape, silenciadores.	-	Sí (Ford, General Motors, Honda, Peugeot Citroën, Renault, Volkswagen)	2	PBA y Córdoba

Felko	Argentina	No	Antenas.	-	Sí (Ford, Peugeot, Renault)	1	PBA
Ferrosider Parts	Argentina	No	Conjuntos mecánicos, conjuntos y subconjuntos soldados, piezas estampadas.	No	Sí (Ford, General Motors, Stellantis, Volkswagen)	1	PBA
Flex-N-Gate	EEUU	No	Bisagras de capot, bisagras de portón trasero y baúl, cierres de baúl, cierres de capot, criques, estructuras soldadas, gancho de puerta, gancho de remolque, ganchos (traba cerradura), herramientas para criques, llaves de ruedas, pedales, piezas estampadas, recubrimientos de superficies metálicas con poliamidas de alta performance físico-químicas.	-	Sí (Ford, Peugeot Argentina y Brasil, Renault, Volkswagen, autopartistas y maquinaria agrícola)	1	PBA
Fric Rot	EEUU	No	Amortiguadores de suspension.	No	Sí (Ford, General Motors, Peugeot, Renault, Volkswagen)	1	Santa Fe
Guidi	Argentina	No	Conjuntos y subconjuntos soldados, piezas estampadas.	No	Sí (General Motors)	2	PBA
Henkel	Alemania	No	Adhesivos, selladores.	No	Sí (Fiat, Ford, General Motors, Honda, Mercedes Benz, Peugeot, Renault, Scania, Volkswagen)	1	PBA
Irauto	España	No	Paneles de techo.	No	Sí (Chery Uruguay, Fiat, Ford, General Motors, Honda, Peugeot, Renault, Volkswagen)	1	PBA

Johnson Controls Automotive Systems	EEUU	No	Asientos.	No	Sí (Ford y General Motors)	1	PBA
Johnson Matthey	Reino Unido	No	Catalizadores.	-	Sí (Fiat Argentina y Brasil, Ford Argentina y Brasil, Peugeot Citroën Brasil, Renault Argentina y Brasil, Suzuki Venezuela)	1	PBA
Jtekt	Japón	Sí	Rulemanes y sistemas de dirección.	-	Sí (Nissan)	1	PBA
Juntas Ciccarelli	Argentina	No	Juntas para motores, juntas y juegos de juntas.	No	Sí (Fiat, Ford, Iveco, MWM Brasil, Mercedes Benz, Renault, Scania, Volkswagen)	1	PBA
Lear	EEUU	No	Asientos, mazos de cable.	No	Sí (Ford Argentina y Brasil, General Motors, Peugeot, Renault y autopartistas)	4	2 PBA y 2 Córdoba

Maro	Argentina	No	Armado de subconjuntos con piezas metálicas y plásticas, bisagras de capot, bisagras de portón trasero y baúl, bisagras de puertas, cataforesis, cierres de capot, conjuntos y subconjuntos soldados, correderas de asientos, criques, estructuras de asientos, matrices, palanca de freno de estacionamiento, piezas estampadas, pintado de piezas con pintura en polvo, refuerzos de paragolpes, soportes de batería, soportes de rueda de auxilio.	No	Sí (Mercedes Benz, Peugeot, Volkswagen y autopartistas)	1	PBA
Metagal	Brasil	No	Espejos retrovisores exteriores, espejos retrovisores interiores.	No	Sí (Fiat, Ford, General Motors, Mercedes Benz, Peugeot Argentina y Brasil, Renault, Volkswagen y autopartistas)	1	PBA
Metalsa	México	No	Chasis, conjuntos estructurales.	No	Sí (Ford y Volkswagen)	1	PBA
Metalúrgica Roma	Argentina	No	Productos mecanizados y piezas metálicas complejas como masas de rueda, soportes diferenciales, volantes de motor, brazos de suspensión, puntas de eje, etc.	No	Sí (Fiat, Ford, Iveco, Mercedes Benz, Nissan, Renault, Volkswagen, autopartistas y maquinaria agrícola)	2	Córdoba
Mirgor	Argentina	No	Sistemas de climatización y sus componentes, sistemas de información y entretenimiento.	No	Sí (Ford, General Motors, Mercedes Benz, Volkswagen)	1	Tierra del Fuego
Netso	Argentina	No	Fundas cobertura de robots, paños de limpieza.	No	Sí (Fiat, Ford, Honda, Peugeot,	1	PBA

					Volkswagen y autopartistas)		
Pariani	Argentina	No	Bridas, bujes, cristos, fittings de aire acondicionado, mazas de freno, paneles de frenos, regulador GNC, soportes de motor, tapa de alternador, tapa de caja de distribución, tubo admisión aire-agua.	No	Sí (CNH, Honda, Mercedes Benz, Peugeot, Scania y autopartistas)	1	PBA
Pilkinton	Japón	No	Lunetas, parabrisas, vidrios laterals.	No	Sí (Ford, Honda, Iveco, Mercedes Benz, Nissan, Peugeot y Volkswagen)	1	PBA
Pirelli	Italia-China	No	Neumáticos.	No	Sí (todas)	1	PBA
Plimer	Argentina	No	Productos metálicos.	No		1	PBA
Polimetal	Argentina	No	Ruedas de aluminio.	No	Sí (todas)	1	San Luis
PST Electronica	EEUU	No	Alarmas, sensores de estacionamiento.	No	Sí (Fiat, Ford, Genetal Motors, Peugeot, Renault, Volkswagen, mercado de reposición)	1	PBA
RAEI	Argentina	No	Piezas estampadas, soldadura robótica de partes.	No	Sí (Volkswagen y autopartistas)	1	PBA
Rubol	Argentina	No	Piezas forjadas de precision.	No	Sí (Volkswagen y Nissan)	1	Córdoba
Siderca (Tenaris)	Argentina	No	Barras de refuerzo de puertas, bujes, ejes de acoplado, piezas tubulares conformadas, tubos de acero con y sin costura, laminados en caliente y trefilados en frío. Largos o cortados a medida.	No	Sí (Peugeot y autopartistas)	1	PBA
Tenneco	EEUU	No	Catalizadores, caños de escape, silenciadores.	No	Sí (Ford, General Motors, Mercedes Benz,	1	PBA

					Peugeot, Renault, Volkswagen)		
Testori	Argentina	No	Conductos de admisión, de calefacción, consolas, depósitos de líquido refrigerante, lavaparabrisas, encauzador de aire a radiador, junta de puerta, aislante de aire y ruido, piezas plásticas bi-inyectadas e inyectadas, piezas plásticas sopladas, pisaderas de caja de carga, porta faros antiniebla, soporte airbag, tubos de llenado de combustible, zócalos (interior).	No	Sí (Fiat, Ford, General Motors, Iveco, Mercedes Benz, Peugeot, Renault, Volkswagen)	1	PBA
Toyota Boshoku (antes Master Trim)	Japón	Sí	Asientos, paneles de puertas.	Sí	No	2	PBA
Toyota Tsusho	Japón	Sí	Logística.	Sí	No	1	PBA
Treves	Francia	No	Alfombras, insonorizantes.	No	Sí (Ford, General Motors, Peugeot, Renault, Scania, Volkswagen)	1	PBA
UNE	Argentina	No	Cromado de piezas plásticas, grillas, insignias, manijas de baúl y de portón trasero, manijas exteriores de puertas, manijas interiores de puertas, paneles de instrumentos, piezas plásticas de exterior, piezas plásticas de interior, tanques de combustible, tapa de carga de combustible.	No	Sí (General Motors, Peugeot, Renault y autopartistas)	1	PBA
Union Bat	Argentina	No	Baterías de arranque, baterías estacionarias.	No	Sí (CNH, Ford, Iveco, Mercedes Benz, maquinaria agrícola, autopartistas y	2	PBA y Entre Ríos

					mercado de reposición)		
Ventalum	Argentina	No	Estribos, portaequipajes, ventanillas.	No	No	1	PBA
Vuteq	Japón	No	Paneles de instrumentos y puertas; protector tanque de combustible.	-	-	1	PBA
Yazaki	Japón	No	Mazos de cables, paneles de instrumentos.	Sí	No	1	PBA

Hwpg<grcdqtcek>p'r tqr lc"gp"dcug"c'CHCE."fcvqu"fg"CF IO TC."dncpegu"fg"VCUC"{"gpvtgxkucv0'

REFERENCIAS

Entrevistas

CpfdcnDqtf gtgu."gpvtgxlkuc'r gtuqpcn'43'f g'bo c{q'f g'423; 0'
CpfdcnDqtf gtgu."gpvtgxlkuc'r gtuqpcn'39'f g'cdtkl'f g'42430'
CpfdcnDqtf gtgu."gpvtgxlkuc'r gtuqpcn'45'f g'cdtkl'f g'42430'
Ectnqu'Rep."gpvtgxlkuc'r gtuqpcn'37'f g'gdtgtq'f g'42440'
Etukvcp'Equv."gpvtgxlkuc'r gtuqpcn'46'f g'gpgtq'f g'42450'
FcpkgnJ gttgtq."gpvtgxlkuc'r gtuqpcn'3'f g'lwkq'f g'42440'
Fkgevqxq'f g'ETCHO UC."gpvtgxlkuc'r gtuqpcn'3: 'f g'gpgtq'f g'42450'
Fkgevqt'f g'go r tguv'cwqr ctvkuc."gpvtgxlkuc'r gtuqpcn'42'f g'fkelgo dtg'f g'42440'
Fkiki gpv'f g'CHCE."gpvtgxlkuc'r gtuqpcn'32'f g'lwpkq'f g'42440'
Gf wctf q'Mtqpdgti ."gpvtgxlkuc'r gtuqpcn'4: 'f g'gpgtq'f g'42440'
Gf wctf q'Tgkmf ."gpvtgxlkuc'r gtuqpcn'47'f g'lwkq'42430'
Glgewlxq'f g'Vq{ qvc'Uwf^a Itlec."gpvtgxlkuc'vgrh»plec.'37'f g'cdtkl'f g'42430'
Gzr tgukf gpv'f g'qvt'vgtv lpcn'cwqo qvtk ."gpvtgxlkuc'vgrh»plec.'46'f g'bo c{q'f g'423; 0'
Gj gs wgn'Xcmglqu."gpvtgxlkuc'vgrh»plec.'42'f g'lwpkq'f g'42430'
I gtgpg'f g'Vq{ qvc."gpvtgxlkuc'r gtuqpcn'46'f g'ci quvq'f g'42430'
J qtcek'f g'Egr gfc."gpvtgxlkuc'r gtuqpcn': 'f g'gdtgtq'f g'423; 0'
Lqu²'Crdgtq'Q cnf qpcf q."gpvtgxlkuc'r gtuqpcn'3; 'f g'pqxkgo dtg'f g'42440'
Lqu²'Cmqu."gpvtgxlkuc'r gtuqpcn'32'f g'lwkq'f g'42440'
Lxcp'P qxgm"gpvtgxlkuc'r gtuqpcn'49'f g'bo c{q'f g'42440'
Lwkq'Eqtf gtq."gpvtgxlkuc'r gtuqpcn'33'f g'gdtgtq'f g'42440'
Nwku'N»r gj ."gpvtgxlkuc'r gtuqpcn'38'f g'fkelgo dtg'f g'42440'
O cvfu'U cf ci nk."gpvtgxlkuc'r gtuqpcn'33'f g'gpgtq'f g'42450'
Rcdm'Tceekwk"gpvtgxlkuc'r gtuqpcn'5'f g'lwpkq'f g'42440'
TcÀiCo kn"gpvtgxlkuc'r gtuqpcn'3; 'f g'lwpkq'f g'42440'
Tlectf q'Rki pcpgnk"gpvtgxlkuc'r gtuqpcn': 'f g'lwkq'f g'42440'

Acuerdos internacionales

Cev"fg"Dwgpqu"Ckgu0'Rtqi tco c"fg"Kvgi tcek»p"{"Eqqr gtcek»p"Geqp»o lec"*RIEG+"gpvtg"rc"Trg Àdrlec"
Cti gpvpc"{"rc"Trg Àdrlec"Hgf gtcvxc"fg"gn'Dtcukl'3; : 8+;4; 'f g'lwkq'f g'3; : 80'
Cewgtf q'fg"Crcpeg"Rctekn'fg"Eqo r ngo gpvcek»p"Geqp»o lec"*CCREG+P à'7: "gpvtg'gn'O gtequw"{"Rgt'À0'
52" fg" pqxkgo dtg" fgn' 42270' Tgewr gtcf q" fg"
[j wr <ly y y 40rcf kQti lpuhrcf khgzvef qupuhl6f 7e3: g77844g326254796; 2229783341: 5h768f h53
lf: d5225479: ; 722751545AQR gpF qewo gpy"](http://www.ilo.org/public/db/condoc/222751545AQR.gpF.qewo.gpv)
Cewgtf q'fg"Crcpeg"Rctekn'fg"Eqo r ngo gpvcek»p"Geqp»o lec"*CCREG+P à'7: "gpvtg'gn'O gtequw"{"rc"
Eqo wplcf " Cpf lpc" *ECP +0' Tgewr gtcf q" fg"
[j wr <ly y y 40rcf kQti lpuhrcf khgzvef qupuhl: 22f 45; 4: 2373cf 4: 5479f: 222773f 3hlc: 9d; ; 379
8: ced; d25479: ch226def 6: AQR gpF qewo gpy"](http://www.ilo.org/public/db/condoc/222751545AQR.gpF.qewo.gpv)
Cewgtf q'fg"Eqo r ngo gpvcek»p"Geqp»o lec"*CEG+P à'35"gpvtg"rc"Trg Àdrlec"fg"Cti gpvpc"{"rc"Trg Àdrlec"fg"gn'
Rctci w{0' 43' fg" qewdtg" fg" 423; 0' Tgewr gtcf q" fg" [j wr <ly y y 40rcf kQti lpuhrcf khgzvef qupuhl: 22f 45; 4: 2373cf 4: 5479f: 222773f 3hlc: 9d; ; 379
8: ced; d25479: ch226def 6: AQR gpF qewo gpy"](http://www.ilo.org/public/db/condoc/222751545AQR.gpF.qewo.gpv)
[j wr <ly y y 40rcf kQti lpuhrcf khgzvef qupuhl: 22f 45; 4: 2373cf 4: 5479f: 222773f 3hlc: 9d; ; 379
8: ced; d25479: ch226def 6: AQR gpF qewo gpy"](http://www.ilo.org/public/db/condoc/222751545AQR.gpF.qewo.gpv)
Cewgtf q'fg"Eqo r ngo gpvcek»p"Geqp»o lec"*CEG+P à'36"gpvtg"rc"Trg Àdrlec"fg"Cti gpvpc"{"rc"Trg Àdrlec"
Hgf gtcvxc" fg" Dtcukl' 42" fg" fkelgo dtg" fg" 3; ; 20' Tgewr gtcf q" fg"
[j wr <ly y y 40rcf kQti lpuhrcf khgzvef qupuhl: 22f 45; 4: 2373cf 4: 5479f: 222773f 3hlc: 9d; ; 379
8: ced; d25479: ch226def 6: AQR gpF qewo gpy"](http://www.ilo.org/public/db/condoc/222751545AQR.gpF.qewo.gpv)
Cewgtf q'fg"Eqo r ngo gpvcek»p"Geqp»o lec"*CEG+P à'94"gpvtg'Eqmjo dlc"{"gn'O gtequw'045'f g'lwkq'f g'423: 0'
Tgewr gtcf q'fg" [j wr <ly y y 40rcf kQti lpuhrcf khgzvef qupuhl: 22f 45; 4: 2373cf 4: 5479f: 222773f 3hlc: 9d; ; 379
8: ced; d25479: ch226def 6: AQR gpF qewo gpy"](http://www.ilo.org/public/db/condoc/222751545AQR.gpF.qewo.gpv)

Cewgtf q'f g'Eqo r ngo gpvcel»p'Geqp»o lec*CEG+P à'77"gpvtg'O²zleq'{"gr'O gtequwt'0'
 4: à'Rtqveqm' Cf lekqpcn'/'Cewgtf q'f g'Eqo r ngo gpvcel»p'Geqp»o lec*CEG+P à'36"gpvtg'rc'Tgr Àdrlec'f g'
 Cti gpvpc' {" rc'Tgr Àdrlec' Hgf gtcvkc' f g' Dtcuk'0' 3; " f g' qewdtg' f g' 3; ; ; 0' Tgewr gtcf q' f g'
[j wr <ly y y òlegòcuòti IVtcf g ICTI aDTC ICTI DT Ca kpf Rtqvèur](#) "'
 53à'Rtqveqm' Cf lekqpcn'/'Cewgtf q'f g'Eqo r ngo gpvcel»p'Geqp»o lec*CEG+P à'36"gpvtg'rc'Tgr Àdrlec'f g'
 Cti gpvpc' {" rc'Tgr Àdrlec' Hgf gtcvkc' f g' Dtcuk'0' 33' f g' ppxlgo dtg' f g' 42240' Tgewr gtcf q' f g'
[j wr <ly y y òlegòcuòti IVtcf g ICTI aDTC ICTI DT Ca kpf Rtqvèur](#) "'
 53à'Rtqveqm' Cf lekqpcn'/'Cewgtf q'f g'Eqo r ngo gpvcel»p'Geqp»o lec*CEG+P à'57"gpvtg'Ej krg' {" gr'
 O gtequwt'0' ; " f g' ugr vgo dtg' f g' 42240' Tgewr gtcf q' f g'
[j wr <ly y y òlegòcuòti IVRF IEJ Na O GT IEJ Na O GT auèur %Rtqveqm](#) "'
 F gekul»p'92422200 gtequwt'0'Rqif'lec' Cwqo qvk' f gr'O gtequwt' *RCO -037'f g'f lelgo dtg'f g'42220'

Leyes, Decretos, Resoluciones y publicaciones en el Boletín Oficial de la República

Argentina

Dqrg'p'Qhclcn'f g'rc'Tgr Àdrlec' Cti gpvpc'0'Rtgul'f g'rc'P cel»p' Cti gpvpc. '52'f g'lwkl'f g'42230'
 F getgv'48991; 30'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. 'Dwgpqu' Cktgu. 'Cti gpvpc. '42'
 f g'f lelgo dtg'f g'3; ; 30'
 F getgv' : ; 71; 60'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. 'Dwgpqu' Cktgu. 'Cti gpvpc. '32'f g'
 lvpk'f g'3; ; 60'
 F getgv'449: 1; 60'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. 'Dwgpqu' Cktgu. 'Cti gpvpc. '45'
 f g'f lelgo dtg'f g'3; ; 60'
 F getgv'551; 80'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. 'Dwgpqu' Cktgu. 'Cti gpvpc. '37'f g'
 gpgt'f g'3; ; 80'
 F getgv'88242220'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. 'Dwgpqu' Cktgu. 'Cti gpvpc. '3'
 f g'ci quq'f g'42220'
 F getgv'8: : 42240'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. 'Dwgpqu' Cktgu. 'Cti gpvpc. '48'
 f g'cdtkif'g'42240'
 F getgv'99642270'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. 'Dwgpqu' Cktgu. 'Cti gpvpc. '47'
 f g'ugr vgo dtg'f g'42270'
 F getgv'CHR'95242230' Cf o lkvgtk'f g' Hgf gtcn'f g' Kpi tguqu' RÀdrlecqu. 'Dwgpqu' Cktgu. 'Cti gpvpc. '42'f g'
 ppxlgo dtg'f g'42230'
 Hqpf q' r ctc' gr'F guctqmq' Geqp»o leq' Cti gpvpc' *HQP F GCT +0' Dwgpqu' Cktgu. 'Cti gpvpc. 'ci quq'f g'42370'
 Ng { "320'690' Rtgu'f g'rc'P cel»p' *3; ; 6-0'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. '
 Dwgpqu' Cktgu. 'Cti gpvpc'0'
 Ng { "360: 20' Rtgu'f g'rc'P cel»p' *3; ; 7-0'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. '
 Dwgpqu' Cktgu. 'Cti gpvpc'0'
 Ng { "360: 30' Rtgu'f g'rc'P cel»p' *3; ; 7-0'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. '
 Dwgpqu' Cktgu. 'Cti gpvpc'0'
 Ng { "430: 40' Rtgu'f g'rc'P cel»p' *3; ; 5-0'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. '
 Dwgpqu' Cktgu. 'Cti gpvpc'0'
 Ng { "430'540' Rtgu'f g'rc'P cel»p' *3; ; 9-0'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p'0'
 Dwgpqu' Cktgu. 'Cti gpvpc'0'
 Ng { "460'6240' Rtgu'f g'rc'P cel»p' *3; ; 6-0'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. '
 Dwgpqu' Cktgu. 'Cti gpvpc'0'
 Ng { "480: 50' Rtgu'f g'rc'P cel»p' *422: -0'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p'0'
 Dwgpqu' Cktgu. 'Cti gpvpc'0'
 Ng { "490'850' Rtgu'f g'rc'P cel»p' *4238-0'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p'0'
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 Tguvnel»p'7271; 70'0' lkvgtk'f g' Lwvlek' {" F gtgej qu'J wo cpqu'f g'rc'P cel»p. 'Dwgpqu' Cktgu. 'Cti gpvpc. '36'
 f g'ppxlgo dtg'f g'3; ; 70'

Tguqnwelp"644I; : 00 kplngtkq'f g'Lxwlelc{" F gtgej qu'J wo cpqu'f g'rc'P celp."Dwgpqu'Cktgu.'Cti gpvpc.'9"
 f g'lwkq'f g'3; ; : 0'
 Tguqnwelp"87I; : 00 kplngtkq'f g'Lxwlelc{" F gtgej qu'J wo cpqu'f g'rc'P celp."Dwgpqu'Cktgu.'Cti gpvpc.'5'f g'
 hgdgtq'f g'3; ; : 0'
 Tguqnwelp"49I; : 00 kplngtkq'f g'Lxwlelc{" F gtgej qu'J wo cpqu'f g'rc'P celp."Dwgpqu'Cktgu.'Cti gpvpc.'48"
 f g'ci quw'f g'3; ; : 0'
 Tguqnwelp"44; 422200 kplngtkq'f g'Lxwlelc{" F gtgej qu'J wo cpqu'f g'rc'P celp."Dwgpqu'Cktgu.'Cti gpvpc."
 3; 'f g'o c{q'f g'42220'
 Tguqnwelp" P à' 47842220' O kplngtkq' f g"Lxwlelc" { " F gtgej qu' J wo cpqu' f g' rc' P celp." Dwgpqu' Cktgu."
 Cti gpvpc.'5'f g'cdtklf g'42220'
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 Tguqnwelp"45; 422700 kplngtkq'f g'Lxwlelc{" F gtgej qu'J wo cpqu'f g'rc'P celp."Dwgpqu'Cktgu.'Cti gpvpc."
 47'f g'lwpkq'f g'42270'
 Tguqnwelp"54; 423600 kplngtkq'f g'Lxwlelc{" F gtgej qu'J wo cpqu'f g'rc'P celp."Dwgpqu'Cktgu.'Cti gpvpc."
 52'f g'ugr vgo dtg'f g'42360'
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 37'f g'qewdtg'f g'42360'
 Tguqnwelp"34; 5423700 kplngtkq'f g'Lxwlelc{" F gtgej qu'J wo cpqu'f g'rc'P celp."Dwgpqu'Cktgu.'Cti gpvpc."
 9'f g'ugr vgo dtg'f g'42370'
 Tguqnwelp" I gpgtcn' CHR' 7; 8B; ; ; 0' Cfo kplwlcelp" Hgf gtcn' f g' Kpi tguqu' RÀdriecu." Dwgpqu' Cktgu."
 Cti gpvpc.'39'f g'o c{q'f g'3; ; ; 0'
 Tguqnwelp"Eqplwpc"; 5423; "/" Ugetgvt'f g'Eqo gtekq'Gzvgtkq" g'Kpf wutlc0'O kplngtkq'f g'Lxwlelc{"
 F gtgej qu'J wo cpqu'f g'rc'P celp."Dwgpqu'Cktgu.'Cti gpvpc.'35'f g'pqlgo dtg'f g'423; 0'

Documentos de empresas y de asociaciones empresarias

CFGHC" òVq{qvc' 42" cò qu" f g" r tqf weelap" gp" Cti gpvpcö" *43" f g" o ct| q" f g" 4239+0' Tgewr gtcf q" f g"
[j wr <ly y y Qf ghcQtI Qet lguir tgpuc/nggtAk ?328\(kf v?4"](#)
 Dcnpreg'Vq{qvc'Cti gpvpc'Uqelgf cf "Cp»plo c"*39'f g'lwkq'f g'4225+0Tgr Àdriec'Cti gpvpc0"
 Dcnpreg'Vq{qvc'Cti gpvpc'Uqelgf cf "Cp»plo c"*49'f g'lwkq'f g'4227+0Tgr Àdriec'Cti gpvpc0"
 Dcnpreg'Vq{qvc'Cti gpvpc'Uqelgf cf "Cp»plo c"*4; 'f g'ci quw'f g'4228+0Tgr Àdriec'Cti gpvpc0'
 Dcnpreg'Vq{qvc'Cti gpvpc'Uqelgf cf "Cp»plo c"*34'f g'ugr vgo dtg'f g'4229+0Tgr Àdriec'Cti gpvpc0'
 Dcnpreg'Vq{qvc'Cti gpvpc'Uqelgf cf "Cp»plo c"*43'f g'lwkq'f g'4236+0Tgr Àdriec'Cti gpvpc0'
 Dcnpreg'Vq{qvc'Cti gpvpc'Uqelgf cf "Cp»plo c"*7'f g'lwpkq'f g'4237+0Tgr Àdriec'Cti gpvpc0'
 Dcnpreg'Vq{qvc'Cti gpvpc'Uqelgf cf "Cp»plo c"*: 'f g'lwpkq'f g'4238+0Tgr Àdriec'Cti gpvpc0'
 Dcnpreg'Vq{qvc'Cti gpvpc'Uqelgf cf "Cp»plo c"*48'f g'lwpkq'f g'4239+0Tgr Àdriec'Cti gpvpc0'
 Fcpc"òF cpc'Eqtr qtcvqp"eqo lgp| c"rc'r tqf weelap"r ctc"rc"r rvcxqto c"o wpl knf g'eco kppgcu"fg"Vq{qvcö"
 *4227+0' Tgewr gtcf q" f g" [j wr u<lf cpc@qo Qet lpxwlekcult cpc/eqtr qtcvqp/eqo lgp| c/rc/r tqf weelap/
 r ctc/rc/r rvcxqto c/o wpl knf g'r lemw/f g/vq{qvc!"](#)
 Hqtf ""*7'f g'cdtklf g'4238+0'òHqtf "lpxguru"&392"o knkqp"lp"Uqwj "Chtlec"vq"dwkf "yj g'cm/pgy "gxgtguv"UWX."
 etgcwpi " 3.422" pgy " lquü0' Tgewr gtcf q" f g"
[j wr u<lb gf k0qtf @qo leqpvpgvhlqtf o gf k lpc kwleplpgy u4238126127 lqtf /lpxguru/392/o knkqp/
 lp/uqwj /chtlec/vq/dwkf /pgy /gxgtguv/uxxj vo n "](#)
 Kpf wutlcu" I wkf k' 4232" /" 4242' 82" Cplxgtuctkq" *4242+0' Tgewr gtcf q" f g"
[j wr <lfp wutlcui wkf k@qo Qet lpf wutlcu/i wkf k/82/cplxgtuctkq!"](#)
 O ki qt"òKppqxcelap."rc'f kxkulp"s wq'cegntc'gn'letgelo lgpvq'f g'O ki qtö"*45'f g'ci quw'f g'4243+0Tgewr gtcf q"
 f g" [j wr u<lb ki qt@qo Qet lpgy utqqo llppqxcelap/rc/f kxkulp/s wq/cegntc/gn'letgelo lgpvq/f g/
 o ki qt!"](#)
 Vq{qvc" ò97" {gctu" qh" Vq{qvcö" *4234+0' Tgewr gtcf q" f g" [j wr u<ly y y 0q{qvc/
 i mjdcf@qo leqo r cp/ j knqt / aqhaq{qvc197} gctu"](#)
 Vq{qvc"òVq{qvcö"i mjden'Utcvgi {ö"*38'f g'cdtklf g'4225+0"

Vq{qvc"öVq{qvc"Vq"Dgi kp"Xgj kerg"O cpwlcwtkpi "Kp"Cti gpwpcö"*47"f g"o ct| q"f g"3; ; 6+0Tgewr gtcf q"f g"
[j wr u<li mjdcf0q{ qvc lgp lf gvckn9: 7: ; : 4"](#)
Vq{qvc"öVq{qvc"X"Rtqlgev"Vcngu"Hktuv"Dli "Ugr "Hqyt ctf ö"*47"f g"ci quwq"f g"4226+0Tgewr gtcf q"f g"
[j wr u<li mjdcf0q{ qvc lgp lf gvckn4452: 7"](#)
Vq{qvc"öVq{qvc"Vj gpgtcvgu"Vj qwucpf "Lqdu'y kj "Gzr cpukqp"qh'Rncpv'lp"Cti gpwpcö"*: "f g"o ct| q"f g"4238+0
Tgewr gtcf q"f g"[j wr u<li mjdcf0q{ qvc lgp lf gvckn33562962"](#)
VO E"*3; ; : +Vq{qvc<"J kvqt{ "qh'y g'Hktuv'72' l gctu."Vq{qvc<"Vq{qvc"O qvt'Eqtr qtcvkap'0

Artículos periodísticos

öC"S wleniNqqmiDcenlqp"vj g"Eqtmæu'77/[get"J kvqt{ 'y kj "Qxgt'72'O krlqp"Ewuxqo gtuö"*35"f g"ci quwq"f g"
4243+0Toyota Times0Tgewr gtcf q"f g"[j wr u<li hq{ qvc vko gu0r lgp lkpulf gvq{ qvc B3860 vo n"](#)
Ci wkrt. "O 0öElgttc"rc"Änko c"lf dtlec"f g"mpvcu'f gn'r c"llo"*36"f g"hgdtgtq"f g"4239+0Clarín0Tgewr gtcf q"f g"
[j wr u<ly y y Örtkpöeqo lgeqpqo kc lkgttc/wmko c/hcdtlec/mpvcu/r ckua2at3gf QVrMi Q vo n"](#)
öCwqr ctvkuu"r tgx² p"pwgxc"qrc" f g" kpxgtukppguö" *5" f g" o c{ q" f g"4228+0' El Cronista0Tgewr gtcf q"f g"
[j wr u<ly gdÖtej kxQti ly gd42292: 2: 223; 7: lj wr <ly y y ÖhceQti Öt lpxxf Ö j r Af ?66"](#)
Dgtvgmq. "HöVq{qvc"lpxkt vö. 'r gtq'r kf g'r qm'lecu'gucdnguö"*42'f g"qewdtg'f g"4227+0La Nación0Tgewr gtcf q"
f g" [j wr u<ly y y Örpcekpöeqo Öt lgeqpqo kc lq{ qvc/lpxk vq/r gtq/r kf g/r qrklec/gucdngu/
pkf96: 358!"](#)
Ecdqv."F 0öCxcpl c"gnl² i ko gp" f g" lpegpvku'lkuecnguö"*34'f g"hgdtgtq'f g"4227+0La Nación0Tgewr gtcf q"f g"
[j wr u<ly y y Örpcekpöeqo Öt lgeqpqo kc lxcpl c/gnl²gi ko gp/f g/lpegpvku'lkuecngu/pkf 89; 2; 6](#)
Egtgl q. "HöXY "ug"tgcvkxc"gp" Cti gpwpc"eqp" c{ wf c" gur c" qmö" *39" f g" hgdtgtq'f g"4232+0' El Mundo0
Tgewr gtcf q"f g"[j wr u<ly y y Öm wpf qÖulgm wpf qo qvt 4232 l24 l37 lgo r tguv B48844375: Q vo n"](#)
Egtlqvw. "NöVq{qvc" {c"gzr qtvc"rc"r leniwr "J kwz" c"43'r c"lguö"*38'f g"o ct| q" f g"4239+0'Clarín0Tgewr gtcf q"
f g"[j wr u<ly y y Örtkpöeqo lgeqpqo kc lq{ qvc/gzr qtvc/r leniwr /j kwz/43/r ckua2aJ {Nöewurj vo n"](#)
Etkwöhm. "E0öE»o q'r kcpuc"l wuxxq"Ucrkpu."gn'pwgxr" tgu'f gpv'f g"Vq{qvc" Cti gpwpcö"*42'f g" f lkgdo dtg"
f g"4244+0'Motor 1. Tgewr gtcf q"f g"[j wr u<li Öt qvt3Öeqo lpgy ul8496: : lq{ qvc/cti gpwpc/i wuxxq/
ucrkpu!"](#)
öEt² f kqu" r tqf wvkuö" *34" f g" ugr vgo dtg" f g" 4236+0' Página 12. Tgewr gtcf q" f g"
[j wr u<ly y y Ö ci kpc34Öeqo Öt lf kctk lgeqpqo kc 4/477373/4236/2: /34Q vo n"](#)
Etkwöhm. "E0öC"Vq{qvc"lpxlgtv'W&U: 22'o kmppgu'r etc'hcdtlect'rcu'pwgxcu"J kwz lUY 6"gp" \ a tcvö"*4'f g"
o c{ q" f g"4236+0'Motor10Tgewr gtcf q"f g"[j wr u<li Öt qvt3Öeqo lpgy ul6936: 4 lq{ qvc/lpxlgtv/r ctc/
hcdtlect!"](#)
öF cplgn'J gttgtq."f g"Vq{qvc<"\$Xco qu'r qt"gnl² eqtf" j kwötleq" f g"r tqf weekp" { "gzr qtvclo"pö"*36'f g"qewdtg"
f g" 4243+0' El Cronista. Tgewr gtcf q" f g" [j wr u<ly y y ÖtqpkncÖeqo lgeqpqo kc/r qrklec lf cplgn/
j gttgtq/f g/vq{ qvc/xco qu/r qt/gnl²geqtf/j kvqtq/f g/r tqf weekp/ /gzr qtvclo!"](#)
öF gvtqku"lo r tguugf <J qy "vj g"Cwutcrkcp" gpi lpggtkpi "cpf" f guli p"lpi gpwv{ "dgi kpf" vj g'y qtrf /eruu"Hqtf"
Tcpi gt"cpf" Gxgtguv'j cu'dggp"pqvlegf 00'cpf" y j cv'ky kmlgcf "vq'pgz vö"*46'f g"cdtklf g"4244+0'Cars
Guide0' [j wr u<ly y y Öctui wlf gÖeqo Öwlect/pgy ulf gvtqku/lo r tguugf /j qy /vj g/cwutcrkcp/
gpi lpggtkpi /cpf/ f guli p/ lpi gpwv/ dgi kpf /vj g/y qtrf "](#)
öF k' mji q" r tqf wvku" eqp" F cplgn'J gttgtqö" *3: "f g" lwrkq" f g"4244+0' Misión Productiva. Tgewr gtcf q" f g"
[j wr u<li kulkpr tqf wvkuÖeqo Öt lf kmji qu/r tqf wvku4244 l29 B: lf kmji q/r tqf wvku/eqp/
f cplgn'j gttgtq!"](#)
öGn' öo qf gnuö" Vq{qvc" r qpg" vgpukp" gp" rc" grgeekp" f g" CF GHCö0' Ámbito0' Tgewr gtcf q" f g"
[j wr u<ly y y Öo dkkqÖeqo lgl lkkp/lo r tguv lgn'o qf gm/vq{ qvc/r qpg/vgpukp/rc/ grgeekp/cf ghc/
p625847: "](#)
öGn'I qdltgp"mp| »"gn'RtqEtgCWWQ."wpc"lfpge" f g"et² f kq" dctcvq" r etc"eqo r tct"xgj l'wqu'pwgxcuö"*45'f g"
lwplq" f g"4236+0'La Nación0Tgewr gtcf q" f g"[j wr u<ly y y Örpcekpöeqo Öt lgeqpqo kc lgn'i qdltgp/
rpl q/ gn'r tqetgcwq/wpc/rkpgc/f g/etgf kq/dctcvq/r etc/eqo r tct/xgj l'wqu'pwgxcu/pkf 3925; 39"](#)
öGrgeekp" f g" CF GHC" vgo kp»" eqp" wp" r qvc| q" f g" Vq{qvcö0' Ámbito0' Tgewr gtcf q" f g"
[j wr u<ly y y Öo dkkqÖeqo lgl lkkp/lo r tguv lgrgeekp/cf ghc/vgo kpq/wp/r qvc| q/vq{ qvc/p6258: 7: "](#)

ðGp"o cvgtk"fg"lpxgtukppgu"fgtgevcu."re"Cti gpvpc"ug"o cpwxq"crí"o cti gp"fg"re"etkuku"49"fg"fg"lelgo dtg"fg" 3; ; : -0' *La Nación*0' Tgewr gtcf q" fg" [j wr u-ly y y 0rcpckp0eqo 0t lgeqppo kc lgp/o cvgtk/f g/ lpxgtukppgu/f ktgevcu/re/cti gpvpc/ug/o cpwxq/crí/o cti gp/f g/re/etkuku/pkf 344943!](#)"

Gueqdet."D0"EGQ"fg"Vq{qvc"gp"ncvo <Tgi k0p"0pa"gu" r tgr ctcf c0"0p"r ctc"xgi "ewru"grf evt lequ0"45"fg" o ct| q" fg" 4244+0' *Bloomberg Línea.* Tgewr gtcf q" fg" [j wr u-ly y y 0lmgqo dgti r0pge0eqo 4244 125 45 legq/f g/vq{qvc/gp/ncvo /tgi kq/pq/guvc/r tgr ctcf c/ cwp/r ctc/xgi lewru/grgevt lequ!](#)"

ðHqtf "tglpxgpc"re"r leml"r"eqp"wp"pwgxc"TCpi gt"i ncdnr tqf welf c"gp"re"Cti gpvpc0"4"fg"lwrkq"fg"4234+0' *iProfesional*0Tgewr gtcf q"fg" [j wr u-ly y y 0r tqhukpccf0eqo lpaucul35; 86: /Hqtf /tglpxgpc/re/r leml w/eqp/wpc/pwgxc/TCpi gt/i ncdnr tqf welf c/gp/re/Cti gpvpc!"](#)

Hquck"i 00C"47"0"qu"fg"Vq{qvc"Cti gpvpc"0qu"uget gqu"lco "u'tgxgrf qu"lqdtg"re"gutcvgi kc"fg"r tqf week"p" r ctc" ugt" rff gtgu0" 43" fg" o ct| q" fg" 4244+0' *iProfesional.* Tgewr gtcf q" fg" [j wr u-ly y y 0r tqhukpccf0eqo lewqu57; 49: /vq{qvc/cti gpvpc/47/cpqu/uget gqu/f g/wpc/ qti cpk cekq/rkf gt!"](#)

I qpl" a rgl "Rtcf k"00F gugo dteq"re"pwgxc"J kwz"mgi ct"0c"re"tgi k0p"gp"gnr tko gt"ugo gutg0"48"fg"gpgtq" fg" 4245+0' *La Nación*0' Tgewr gtcf q" fg" [j wr u-ly y y 0rcpckp0eqo 0t lgeqppo kc leqo gteq/ gzvgtkt lf gugo dteq/re/pwgxc/j kwz/mgi ctk/c/re/tgi kq/gp/gnr tko gt/ugo gutg/pkf 48234245!](#)"

ðKpxgtk0 qu"r ctc" gn"fg"gucttqm" cti gpvpc0" 6" fg" ugr vgo dtg"fg"3; ; : -0' *La Nación*0' Tgewr gtcf q" fg" [j wr u-ly y y 0rcpckp0eqo 0t kwqulcn/xqrcpvlpxgtk0 qu/r ctc/gnfg gucttqm/cti gpvpc/ pkf 423964!](#)"

Lwgi wgp."H0Ej kur cl qu"go r tguclku"t gpwpek0"gn"kwrt"fg"Xqmuy ci gp"{"Cf ghc0"8"fg"fg"lelgo dtg"fg"423: -0' *La Nación*0' Tgewr gtcf q" fg" [j wr u-ly y y 0rcpckp0eqo 0t lgeqppo kc l0pf wutlc lej kur cl qu/ go r tguclku/tgpwpek/gn kwrt/f g/xqmuy ci gp/{/cf ghc/pkf 43; ; 8; 9!"](#)

ðNcu" mpcu" fg" re" J kwz" ugt"p" cti gpvpc0" 4" fg" o ct| q" fg" 4233+0' *El Cronista.* Tgewr gtcf q" fg" [j wr u-ly y y 0tqpkvc0eqo lpi qekquNcu/mpcu/f g/re/J kwz/ugtcp/cti gpvpcu/42332524/ 2287q vo r!"](#)

ðO gvcu"cf s wktg"gn"pgi qekq"fg"r tqf wexu"gutwewtcrqu"fg"fcpc"J qrf lpi "Eqtr qtcvq0"39"fg"fg"lelgo dtg" fg" 422; +0' *Mercado.* Tgewr gtcf q" fg" [j wr u-ly y y 0tecf q0eqo 0t lr tqvc qpkuclb gvcnc/cf s wktg/gn/ pgi qekq/f g/r tqf wexu/gutwewtcrqu/f g/fcpc/j qrf lpi /eqtr qtcvq!"](#)

ðO ki qt."5: "0"qu"ko r wucpf q"re"l0pf wutlc"{"re"lppqxccl0p0"*. "fg"pqxkgo dtg"fg"4243+0' *Forbes Argentina*0' Tgewr gtcf q" fg" [j wr u-ly y y 0htdguclt gpvpc0eqo lppqxccl0 lo ki qt/5: /cpqu/ko r wucpf q/ l0pf wutlc/lppqxcclq/ p; 8; 8%00000? O ki qt' 42kpek E5' D5' 42uwi' 42cevkxf cf gu' 42gp.f go qutcpf q' 42uwi' 42 r qulekqpc0 kpvq' 42f' 42vcpur ctgpek0!"](#)

P qtkj kmq."U00Vq{qvc"cr wguv"r qt"ru"r c"lgu"go gti gpvpc0"34"fg"o c{q"fg"4227+0' *The Wall Street Journal.* Tgewr gtcf q"fg" [j wr u-ly y y 0nkg0 r q0eqo ktej kxq lf gewo gpvq IO CO /385544: "](#)

Qxkqf q."l00Vq{qvc"r lgpuc"gp"cw0 gpvct"uw"lpxgtuk0p0"5"fg"lqdtgtq"fg"4228+0' *La Nación*0' Tgewr gtcf q"fg" [j wr u-ly y y 0rcpckp0eqo 0t lgeqppo kc lq{qvc/r lgpuc/gp/cw0 gpvct/uw/lpxgtukq/pkf 999787!"](#)

ðRgpuct" o "u" gp" etgegt" {"pq" wpcq" gp" nu" tlcrgu0" 7" fg" ci quw" fg" 422: -0' *Cars.* Tgewr gtcf q" fg" [j wr u-ly y y 0ctu0eqo 0t lpaqkcl B354 lf cplgn/j gttgtq/r tgukf gpvq/vq{qvc/cti gpvpc/uc!"](#)

ðRkf gp" tghqvct" gn" cewgtf q" eqp" O 2zleq0" 4" fg" lwrkq" fg" 4234+0' *La Nación*0' Tgewr gtcf q" fg" [j wr u-ly y y 0rcpckp0eqo 0t lgeqppo kc lr kf gp/tghqvct/gn cewgtf q/eqp/o gzleq/pkf 36: 8; 52!"](#)

Rqmrem" Cpf tgy "0Vq{qvc" F qwdrgu"ku"J qrf lpi u"l0p" F clj cuw"O qvqt"qh"lcr cp0"43"fg"ugr vgo dtg"fg"3; ; 7+0' *The New York Times.* Tgewr gtcf q" fg" [j wr u-ly y y 0p{vo gu0eqo B; ; 7 D; 43 kwukp guu l0pvt pcvqpcn/dwukp guu/vq{qvc/f qwdrgu/ku/ j qrf lpi u/lp/f clj cuw/o qvqt/qh/lcr cp0 vo r!"](#)

ðS w2" r cuc0" 36" fg" hqdtgtq" fg" 4224+0' *La Nación*0' Tgewr gtcf q" fg" [j wr u-ly y y 0rcpckp0eqo 0t lgeqppo kc lswg/r cuc/pkf 595; 52!"](#)

ðS w2" r cuc0"39"fg"lwrkq"fg"4224+0' *La Nación*0' Tgewr gtcf q"fg" [j wr u-ly y y 0rcpckp0eqo 0t lgeqppo kc lswg/ r cuc/pkf 636584!"](#)

ðS w2" r cuc0" 33" fg" hqdtgtq" fg" 4225+0' *La Nación*0' Tgewr gtcf q" fg" [j wr u-ly y y 0rcpckp0eqo 0t lgeqppo kc lswg/r cuc/pkf 694: 9: !!"](#)

Ukpl . "C0'öNc" gur c° qnr "Rtqo qcwq" xgpf g" uww' ewcvt q" r npxcu" gp" gn' r c" juö" *42" f g" f kelgo dtg" f g" 4224-0' *La Nación* Tgew gtef q" f g" [j wr u-ly y y ÖrpcekpÖeqo Öt lgeppqo kc lr/ gur cpqr/ r tqo qcwq/ xgpf g/ uww' ewcvt q/ r npxcu/ gp/ gn' r cku/ plf 68238: 1"](#)

öVq{ qvcö" *4242-0' *Autohistoria*. Tgew gtef q" f g" [j wr u-1cwqj kvrtkcÖeqo Öt lkp f gzÖ j r lo ctecu/ f g/ cwqulq{ qvc!"](#)

öVq{ qvc<S Cti gp vpc" vöpg' rcu' eqpf lekppgu' pcwrcgu' r ctc' r tqf wek" { "gzt vtct" j kf t> i gpq" eqo q" eqo dwukdr" c" i tcp" guccr" ö" * : " f g" ci quq" f g" 423; +0' *Motor10* Tgew gtef q" f g" [j wr u-1ctÖ qvt3Öeqo lpgy ul69; 385 hq{ qvc/ cti gp vpc/ vöpg/ rcu/ eqpf lekppgu/ pcwrcgu' r tqf wek/ / / gzt vtct/ j kf tqi gpq/ eqo q/ eqo dwukdr/ c/ i tcp/ guccr!"](#)

öVq{ qvc" guwf lc" r" cr gtwtc" f g" qtc" r npxcö" *44" f g" lwpkq" f g" 3; ; : +0' *La Nación* Tgew gtef q" f g" [j wr u-ly y y ÖrpcekpÖeqo Öt lgeppqo kc hq{ qvc/ guwf lc/ r/ cr gtwtc/ f g/ qtc/ r npxc/ plf 322: 45!"](#)

öVq{ qvc" kpcwi wt»" uw" r npxc" cti gp vpcö" *44" f g" o ct| q" f g" 3; ; 9+0' *La Nación* Tgew gtef q" f g" [j wr u-ly y y ÖrpcekpÖeqo Öt lgeppqo kc hq{ qvc/ kpcwi wtq/ uw' r npxc/ cti gp vpc/ plf 87836!"](#)

öVq{ qvc" kpuccr" wpc' r npxc" f g" hwpf cu' f g" culgpvqu" gp" Nwl" pö" *39" f g" lwlkq" f g" 4236-0' *El Cronista*. Tgew gtef q" f g" [j wr u-ly y y Öt qpkvcÖeqo letqpkvc/ r cku lVq{ qvc/ kpuccr/ wpc/ r npxc/ f g/ hwpf cu' f g/ culgpvqu/ gp/ Nwlc/ 42362939/ 2239Q vo r"](#)

öVq{ qvc" kpxgtk" a" 422" o kmppgu" f g" f » r tgu" gp" r" Cti gp vpcö" *42" f g" ugr vgo dtg" f g" 4224-0' *La Nación* Tgew gtef q" f g" [j wr u-ly y y ÖrpcekpÖeqo Öt lgeppqo kc hq{ qvc/ kpxgtk/ 422/ o kmppgu/ f g/ qmctgu/ gp/ r/ cti gp vpc/ plf 655363!"](#)

öVq{ qvc< f g dg" hcekktug" r" gzt vtcelöpö" *4" f g" o ct| q" f g" 4227-0' *La Nación* Tgew gtef q" f g" [j wr u-ly y y ÖrpcekpÖeqo Öt lgeppqo kc hq{ qvc/ f g dg/ hcekktug/ r/ gzt vtcekp/ plf 8: 6252!"](#)

öVq{ qvc. "c" eqpvc cpq< r qt" s w" gu' r" Aplec" cwqo qvtk" qr vö kvc' r ctc" 423; ö" *3" f g" gpqtq" f g" 423; +0' *Clarín*. Tgew gtef q" f g" [j wr u-ly y y ÖrtkpcÖeqo lgeppqo kc hq{ qvc/ eqpvc cpq/ wplec/ cwqo qvtk/ qr vö kvc/ 423; a2aS y EO mj Urj vo r"](#)

öVq{ qvc" tqo r k" t² eqtf u' gp" 4239" { "cecr ct»" gr63" f g" hcu' gzt vtcekppgu' f g" h' kpf wutlc" cwqo qvtk" cti gp vpcö" *38" f g" gpqtq" f g" 423; +0' *Profesional* Tgew gtef q" f g" [j wr u-ly y y ÖrtkpcÖeqo lgeppqo kc hq{ qvc/ tqo r k/ tgeqtf u' gp/ 4239/ / / cecr ctq/ gr63/ f g/ r u' gzt vtcekppgu' f g/ r/ kpf wutlc/ cwqo qvtk/ cti gp vpcÖo r"](#)

Tgdqukq. "C0'öF cplgn' J gttgtq. r tgu' f gpv" f g" Vq{ qvc" Cti gp vpc<öj leko qu" 37Ö22" vguu" { "wxlo qu" 40422" ecuqu" gpvtg" nqu" o" a u' f g" 80722" go r rgef quö" *7" f g" lwpkq" f g" 4243-0' *El Diario AR* Tgew gtef q" f g" [j wr u-ly y y ÖrtkpcÖeqo lgeppqo kc lf cplgn' j gttgtq/ r tgu' f gpv/ vq{ qvc/ cti gp vpc/ j leko qu/ 37/ 222/ vguu/ wxlo qu/ 4/ 422/ ecuqu/ 8/ 722/ go r rgef qua34: a: 2272; 8Q vo r"](#)

Two gcw' I ÖöLqj puqp' Eqpvtqni" o wf c" wpc' r npxc" { "ug' cuqek" eqp' Ctceqö" *9" f g" gpqtq" f g" 4226-0' *El Cronista* Tgew gtef q" f g" [j wr u-ly y y Öt qpkvcÖeqo lko r tgu' i gp gtcn' lqj puqp/ Eqpvtqni/ o wf c/ wpc/ r npxc/ / / ug/ cuqek/ eqp/ Ctceq/ 42262329/ 2247Q vo r"](#)

öVxg' UVCpi gm<S Ukpq' t qf go qu' qr gtct' f qpf g' j c' { kphrcöep. 'pq' t qf go qu' ugt' i nqdcrgu" ö" *44" f g" ugr vgo dtg" f g" 4235-0' *La Nación* Tgew gtef q" f g" [j wr u-ly y y ÖrpcekpÖeqo Öt lgeppqo kc lwxg/ uv/ cpi gm/ uk/ pq/ r qf go qu/ qr gtct/ f qpf g/ j c' / kphrcöep/ pq/ r qf go qu/ ugt/ i nqdcrgu/ plf 3843; 32!"](#)

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Transfer and Hybridization of Productive Models in the International Automobile Industry." "
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F q r g p u n f . " L 0 * 4 2 3 4 + 0 ' *Toyota: Un análisis de la implementación de «lean production» en la empresa y una comparación con las prácticas japonesas*] N l e g p e k w t c . " W p k x g t u k f c f " f g " U c p " C p f t 2 u 0 '
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F q u k " O 0 * 4 2 3 ; + 0 ' *Los industriales en su laberinto: Las estrategias políticas de la Unión Industrial Argentina durante el auge y la crisis neoliberal (1989-2003)* 0 C w q t g u " f g " C t i g p v k p c 0 '
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F wtj co . 'LOD0*4226+0Cduqtr vkg"ecr cekf { "cpf "yj g"ghgew"qh'hqtgki p"fk gevl'kpxguo gpv'cpf "gs vkw' hqtgki p"
r qt vhrkq" kpxguo gpv' qp" geqpqo le" i tqy vj 0' *European Economic Review.*" 48*4+." 4: 7/5280
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F wtj glo . ' 0*3; : 7+0La división del trabajo social0Rrpgvc0'

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pgy qtm" Vj g" Vq{qvc" ecug0' *Strategic Management Journal.*" 450
j wr u-1f qkQti B20224PUEK32; 9/2488*42225+43-5>567<<CF/UOL; 8@0EQ=4/P "

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Politics.*"50*3.+."84/: 90'

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vj g" kpuvkwkqpcn" Hico gy qtni" hqt" HF K'Ur kmxgtu0' *Journal of Banking and Financial Economics.*"
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kpf wut { " cpf " eqwpt { " r cpgr' uwf { . " 3; : 663; ; : 0' *Journal of the Japanese and International
Economies.*"18*4+."383/3: 40j wr u-1f qkQti B20238I0Ikg042250; 027"

Hgt p^a pf gl . "X0T0*4237+0'I mdcn'Xcnwg" Ej kpu"lp" I mdcn' Rqrklecni' P gy qtmu<Vqqn' hqt" F gxgnr o gpv'qt"
P gqrkdgtcn' F gxlegA' *Review of Radical Political Economics.*" 47*4+." 42; /4520
j wr u-1f qkQti B20399I26: 883563675498; "

Hk\ uko qp. "C0" ("I wgxctc. "U0*4239+0'Nc" kpf wutlc" cwqo qtk k" cti gpv'kpc { "uwu"hwgpvgu" f g" i cpcpek<Wp"
cp^a rkuku" f g" rcti q" rrc\ q" *3; 82/4235+0' *América Latina en la Historia Económica*0
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lp" Ncti g" Eqtr qtcv'kpu. " 3; 3; /3; 9; 0' *American Sociological Review.*" 52*3+." 660
j wr u-1f qkQti B204529I42; 75; 3"

Hki uvglp. "P 0*3; ; 2+0The transformation of corporate control0J cxtctf "Wpkxgtuks' "Rt guu0'

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Sociological Review.*"61*6+."8780j wr u-1f qkQti B204529I42; 85; : "

Hki uvglp. "P 0*4223+0The architecture of markets0Rtlpegvqpp' Wpkx0Rt guu0'

Hki uvglp. "P 0*4232+0; 0'Vj g" Rqrklecni' cpf "Geqpqo le" Uqekqmji { "qh' kpvgtpcv'kpcni' Geqpqo le" Cttcp i go gpw0'
Gp" P 0L0Uo gnigt" ("T0Uy gf dgti "Gf u0: "*The Handbook of Economic Sociology, Second Edition*"
r r 03: 5/426+0Rtlpegvqpp' Wpkxgtuks' "Rt guu0j wr u-1f qkQti B20737I; 9: 3622: 577: 603: 5"

Hki uvglp."P0"("F cwdgt."M0*3; ; : +0Utwewtcrn'Ej cpi g"lp"Eqtr qtcvg"Qti cpk cwkq0'Annual Review of Sociology."15*3+'95/; 80j wr u-1lf qkQti B20368 kppwtgx0q070: 23; ; 022667"

Hki uvglp."P0"("F cwgt."N0*4234+0' C" uqekqrj k" f qu" o gtecf qu0' Caderno CRH." 25*8+' 6: 3/7260 j wr u-1lf qkQti B2087; 2IU2325/6; 9; 4234222522229"

Hki uvglp."P0"("Hggrcpf."T0*3; ; 7+0Vj ggt gvecl'cpf"eqo r ctcvkg'r gtur gevkgu'qp"eqtr qtcvg"qti cpk cwkq0'Annual review of sociology."21."43/650"

Hki uvglp."P0"("O eCf co ."F0*4233+0Vqy ctf "c" I gpptcrn'Vj ggt {"qh'Utevgi ke"Cevkqp" Hlgf u0'Sociological Theory."29*3+'3/480j wr u-1lf qkQti B20333 I08689/; 77: 04232035: 70"

Hqtkf c."T0"("Mggpgf {"O0*3; ; 3+0'Vtcur rcpvgf "Qti cpk cwkpu-'Vj g"Vtcurpugt"qh'Lcr cpvg"Kpf wutkcrn' Qti cpk cwkq"q'j g"WU0 f h0'American Sociological Review."56*5+'5: 3/5; ; 0"

Hqwi pgt."V0*4228+0Vj g'ucvg."lpvgtpcwkpcr'eqo r gvkkxgppu'cpf "pgqrkdgtcrn' r qdcrkucwkq<"K'j gtg" c"hwwtg" dg{cpf" -j g" eqo r gvkkq" ucvg0' Review of International Studies." 32*3+' 387/3: 70 j wr u-1lf qkQti B208239IU2482432728228; 9: "

Hg{uugpgv."O0*3; ; : +0Nawukpg'Vq{qvc'f g' ctcvg" Cti gpvkg-0'La Lettre du GERPISA."119."37/3: 0"

Hg{uugpgv."O0*4232+0'La rentabilidad du Groupe Toyota: 1970-20120"

Hki cpv."X0"("\ wo r g."O0*4239+0' Tgf gu" I qdcrn' f g" Rtqf weekp-<" äecf c" xgl " o " a u" i qdcrn' Wpc" eqo r cteckp'f'g'hu'r tqeguqu'f'lpvgi tceckp'i qdcrn'{"tgi kqpcr'dcuf c'gp'f'cvqu'udtg'g'rikpvgteco dlq" eqo gtekn'f g" cwqr ctvgu0' Gp"La encrucijada del autoperismo en América Latina"*WPF CX" Gf lekpgu0'

Hwo kq."M0*4228+0Vj{qvc'cpf' Cukcp' Cwqo qdkrg'Y qtngtu0'Gp'F0Ej cpi "Gf 0:"Labour in globalising Asian corporations. A portrait of struggle"r 03: 3/437+0Cuk' O qpkqt' Tguqvt eg' Egpvt0'

I ci i gtq."C0*4234+0' Gucf q." o gtecf q" {" f lp' a lecu" qti cpk celqpcngu0' Wp" cdqtf clg" f g" ru" gurtcvgi kcu" go r tguetkcu'c'vcx'2 u'f'g'rc' uqekqrj q'c'geqp>o lec0'Papeles de Trabajo."6* ; +59/790"

I ci i gtq."C0'I ci i gtq."L0"("TÀc."O0*4237+0'Rlpekr cngu'ectcevgt'f'ukcu" g" lo r cevg" o cetqgeqp>o leq'f'g'rc" hwi c" f g" ecr kcrn' gp" Cti gpvkg0' Problemas del Desarrollo." 46*3: 4+; 89/; 20 j wr u-1lf qkQti B208238 I0r f 0423708024"

I ci i gtq."C0"("Uej qtt."O0*4238+0'Nc"eÀ wr" go r tguetk' f wtcpg' rqu" i qdktppu" nktej pgtkuc0' Realidad Económica."297.'83/; 40'

I a o gu."O0"("Qrkgc" Ci wktct."L0*4242+0'En medio del fracaso y la transformación empresarial. Toyoda en México. Laboratorio de la industria de bienes de capital, 1953-19610'GriEqngi kq'f g'Ucp'Nwku0'

I cte'p."R000'("N>r gl."C0*4242+0'La inversión extranjera directa: Definiciones, determinantes, impactos y políticas públicas0'Kpvt/Co gtecp'F gxrqr o gpv'Dcpn0j wr u-1lf qkQti B208: 457 I2224823"

I a ttk."C0"("Rcpk q."F0*4238+0'Gn'lo r cevg'f'g'rc" Rqf'lec" Cwqo qtk' "Eqo Àp" *RCE+" uqdtg"rc"lpf wutk' cwqr ctvgu'f g' Cti gpvkg" {" Dtcuk0'Fundación Friedrich Ebert."470'

I a ttk."C0'Rcpk q."F0("I cmq."R0*4236+0'Common Automotive Policy of Argentina and Brazil: Its impact on local and regional auto part industries0'44pf "Kpvtpcwkpcr'Eqmqs wkw "qh'I GTRKUC."M{ qvq." Lcr >p0'

I gtghk" I 0("Hgtpcpf gl /Uctm'M0*4233+0'Global Value Chain Analysis: A Primer0'

I gtghk" I 0'J wo r j tg{"L0"Mcrr'puf."T0"("Uwti gqp."V0'LO*4223+0'Kpvtqf wekq-<"I qdcrkucwkq."Xcnwg" Ej clpu" cpf" F gxrqr o gpv0' IDS Bulletin." 32*5+" 3/: 0' j wr u-1lf qkQti B20333 I0897/; 7658042230 r 542252230"

I gtghk" I 0'J wo r j tg{"L0"("Uwti gqp."V0*4227+0'Vj g"i qxgtpcpeg"qh"i qdcrn'xcnwg"ej clpu0' Review of International Political Economy."12*3+'9: /3260j wr u-1lf qkQti B2082: 2I2; 8; 44; 272226; ; 27"

I gtghk" I 0("Mqt| gpky kel."O0*Gf u00*3; ; 6+0'Commodity chains and global capitalism0'Rtcci gt0'

I gtrcej."O0'N0*3; ; 4+0'Alliance Capitalism: The Social Organization of Japanese Business0'Wpkxgtukf {"qh" Ecrkhtpke'Rtgu0j wr u-1lf qkQti B2087471; 9: 2742; 3; 327"

I j cwtk"R0'P0"("[co lp."O0*422; +0'Tgx'kukpi "j g" lo r cevg'qh" o wnkpcwkpcr' gpvtr tkugu" qp"geqpqo le" f gxrqr o gpv0' Journal of World Business." 44*4+" 327/3290 j wr u-1lf qkQti B208238 I0y d0422: 027032"

I j quj cn"U0("Detwgv."E0C0*3; ; 2+0'Vj g"O wnkpcwkpcr'Eqtr qtcwkq"cu'cp'Kpvtqti cpk cwkpcr'P gy qtn0' Academy of Management Review."15*6+'825/8480j wr u-1lf qkQti B208687 lco t08; ; 206532: 47"

I qpl' a rgl."O0("O cp| cpngk"R0*4234+0'La industria en la posconvertibilidad. El caso del complejo automotor0'f tgc'f g'Geqpqo "f" {"Vgepqrj q'f'f'g'rc"HNCEUQ0'

- I tcpqwgwt. 'O 0*3; : 7+0Gepqo le'Cevkqp'cpf 'Uqekni'Utwevtg<Vj g'Rtqdrgo 'qh'Go dg f gf pguu'American Journal of Sociology.'91*5+; '6: 3/7320j wr u<lf qkQti B2B2: 844: 533"
- I tc° c. 'LOO 0'Egucpc.'R0\ 'Y gmrngt.'I 0*4239+0Wpc'b kcf c'cnngt'pcvxc'F g'hqu'guwf kqu'ugevqtkrcgu'Realidad Económica.'307.'7; /; 40"
- I wkn? p.'O 0'H0*3; ; 6+0'Models of Management: Work, Authority, and Organization in a Comparative Perspective'Wpłxgtuks\ 'qh'Ej keci q'Rtguu'
- I wkn? p.'O 0'H0*4225+0Vj g'geppqo le'Uqekni { 'qh'o ctngvu.'lpf wutkgu.'cpf 'Hto u0'Theory and Society.'32*6+; 727/7370j wr u<lf qkQti B2B245 IC-32477: ; 74762: "
- I wkn? p.'O 0'H0*4226+0Nc'lpvgt'pckqpcrk\ cekp'F g'rcu'go r t'gucu'gur c° qrcu'Historia Empresarial.'812.'433/4460"
- I wpf gt.'Hicpm'C0*3; 96+0F gr gpf gpeg'Kf'F gcf.'Nqpi 'Nkxg'F gr gpf gpeg'cpf 'vj g'Ercuu'Ut wi i rg<Cp' Cpuy gt' vq'Etkeu'Latin American Perspectives.'1*3+; '9/3280"
- J cengw.'U0'E0' ("Utkpkxcup.'M0*3; ; : +0'F q'uw r rgt'uy ke j kpi "equu'f khtg'cetquu' Lcr cpug' cpf "WU' o wnkpcvqpcrk' Hto uA'Japan and the World Economy.'10*3+; '35/540j wr u<lf qkQti B2B238 IU2; 44/3647*; 8+22436/; "
- J cm" R0' C0" (" Uquneg." F0' *4223+0 Varieties of Capitalism' Qzhqtf " Wpłxgtuks\ " Rtguu' j wr u<lf qkQti B2B2; 5 I23; ; 469979Q23Q223"
- J co knqp.'I 0I 0' ("Dki i ctv.'P 0'Y 0*3; ; : +0'0 ctngv.'Ewmtg.'cpf "Cwj qtk\ <C"Eqo r ctevkxg' Cpnc\ uku'qh' Opcpi go gpv'cpf "Qti cpk\ cvkq'lp'vj g'Hct'Gcu'American Journal of Sociology.'94.'74; /; 60"
- J ctf v.'O 0' ("P gi tk'C0*4222+0Imperio'J ctxctf "Wpłxgtuks\ 'Rtguu'
- J ctwej k'V0*4228+0Vq\ qvc'lp'vj g'Rj rkr r kpgu<F tkxg'qwt'F tgco u'qt'F tkxg'vq'vj g"Dqwo A'Gp'<F cg/qw' Ej cpi '*Gf 0;'Labour in Globalising Asian Corporations: A Portrait of Struggle"*r r 0'469/495+0' Cuk' O qpkqt' Tguqwtg' Egptg0'
- J ctxg\.'F 0*4227+0The New Imperialism'Qzhqtf "Wpłxgtuks\ 'Rtguu'
- J ctxg\.'F 0*4237+0Seventeen contradictions and the end of capitalism"*Htu'kuuwgf 'cu'cp'Qzhqtf "Wpłxgtuks\ " Rtguu'r cr gtdcem'Qzhqtf "Wpłxgtuks\ 'Rtguu'
- J cuurgt.'O 0*422; +0'Xct'cvkpu'qh'Xcnw'Etgevkq'<Cwqo qdkg'O cpw'cewt'kpi 'lp'Vj ckrpf 0'Environment and Planning A: Economy and Space.'41*; +; '4454/44690j wr u<lf qkQti B2B28: k6245: "
- J cuurgt.'O 0*4233+0Nqecrk'cvkq' Rtqeguugu'y kj kp'I nqdcn'Rtqf vevkq'P gvy qtm<Cwqo qdkg'Eqo r qpgpv' Uqwekpi 'lp'Vj ckrpf 0'DIE ERDE – Journal of the Geographical Society of Berlin.'142*6+; '64; / 6640"
- J cxtcpgm'V0' ("Kuqxc.\ 0*4233+0Gurko cvkpi 'xgt'vkcni'ur kmxgtu'ltqo 'HF K'Y j { 'tguwu'xct\ 'cpf 'y j cv'vj g' vwg' ghgev' ku' Journal of International Economics." 85*4+; 456/4660 j wr u<lf qkQti B2B238 II0'kpveq0'4233Q29Q26"
- J gemej gt.'G0*3; 3; +0'Vj g'ghgev'qh'htq'gki p'tcf g'qp'vj g'f'kwt'kdwkq'qh'kpego g0'Ekonomisk.'21.'6; 9/7340"
- J gkf gptglej . 'O 0*4234+0Vj g'Uqekni'go dg f gf pguu'qh'o wnkpcvqpcrk'leqo r cplgu<C'rksg'cwt'g'tgxky 0'Socio-Economic Review.'10*5+; '76; /79; 0j wr u<lf qkQti B2B2; 5 lgt lo y u232"
- J glo . 'U0*4235+0Ecr cdkk\ 'dwrk'kpi 'cpf 'h'p'evkpu'qh'UO Gu'lp'dwukguu'i tqwr u<C'ecug'uwf { 'qh'Vq\ qvcu' uw r n\ "ej ckp'0'International Journal of Automotive Technology and Management.'13*6+; '55: 0 j wr u<lf qkQti B2B276 IKC VO 0'4235Q278: 82"
- J glo . 'U0*4238+0Economic Sociology and the Theory of the Firm: Lessons from the "Toyota Momentum" in the History of Capitalism'0M\ qv\ "Wpłxgtuks\ 0'
- J glo . 'U0*4239+0Vq\ qvc.'Xlevko "qh'ku'Rtqf vevkq'U\ ugo <Y j { "f q'Uqekni'Uelgpegu'Ukm'J cxg'O wej "vq' Ngctp'ltqo 'y ku'Hto A'Monthly Paper of the French Network for Asian Studies,' j wr <ly y y 0 ku' tgu'c'w'cukg'Qti I'o qp'vj n\ /ct'v'erguhq\ qvc/xlevko g/vq\ { qv'kuo g/j glo /vgr j cpq0'
- J glo . 'U0*4242+0Vj g'Lcr cpug' Cwqo qv'kxg'lpf wut\ 'U'peg'4222<E'cwugu'cpf 'K' r cew'qh'I tqy vj 'F kur ctkkgu'0' Gp' New Frontiers of the Automobile Industry: Exploring Geographies, Technology, and Institutional Challenges"*Ur t'kpi gt'P cwtg+0'
- J gr gt.'U0' ("J gpf gtuq.'T0*4236+0'Opcpi go gpv'Rt'cevegu.'Tgr'v'kpcn'Eqp'v'cew.'cpf "vj g'F gen'kpg'qh' I gpgcni' O qqtu'0' Journal of Economic Perspectives." 28*3+; 6; /940 j wr u<lf qkQti B2B2479 IIgr 0: B06; "

J gpf gtuqp. 'L0'F lemp. 'R0'J guu. 'O 0'Egg. 'P 0'(' [gwpi. 'J 0Y 0'E0*4224+0I rdcnrl tqf wevkqp'pgvy qtnu'cpf" vj g'pcnq uku'qh'geppqo le'f gxmqr o gpv'0Review of International Political Economy. '9*5+. '658/6860 j wr u-1lf qkQti B2082: 212; 8; 44; 2432372: 64"

J khtgf lpi. 'T0*3; 2; +0Finance Capital: A Study of the latest phase of capitalist development0

J kuej o cp. 'C0Q0*3; 86+0Vj g'Rcvgtplk' "qh'cp' kpf gz0The American Economic Review. "54*7+. '9830

J qny gi. 'O 0*4229+0Vj g'i gpgcmi { "qh'rgcp"r tqf wevkqp0Journal of Operations Management. "25*4+. "642/ 6590j wr u-1lf qkQti B208238 110qo 0422806023"

J qr nkpu. 'V0M0'(' 'Y cmgtugkp. 'K0*3; 99+0Rcvgtpu'qh'F gxmqr o gpv'qh'vj g'O qf gtp 'Y qtrf /U{ uqgo 0'Review (Fernand Braudel Center). "I*4+. '333/3670

J qr nkpu. 'V0M0'(' 'Y cmgtugkp. 'K0*3; : 8+0Ego o qf k' 'Ej ckpu'lp'vj g'Y qtrf /Geppqo { 'Rtkqt'vq'3: 220Review (Fernand Braudel Center). "I0*3. +. '379/3920

J wo rj tgf. 'L0'(' 'Ucrgtpq. 'O 0U0*4222+0I rdcnkucvkqp'cpf 'Cuugo drgt/Uwr r rkt 'Tgrvkvpu'<Dtc| krlcpf "kpf lc0 Gp'LOJ wo rj tgf. 'I 0Ngergt. ("O 0U0'Ucrgtpq" *Gf u0. "Global Strategies and Local Realities" *r 0 36; /397+0Rcn tcxg'O ceo kncp'VM0j wr u-1lf qkQti B2082791; 9: 2555; 99934a9"

J wo rj tgf. 'L0'(' "Uej o k' . 'J 0*4224+0J qy "f qgu" kpu'gtvkqp" k' i rdcn'xcnw" ej ckpu' chgev" wr i tcf lpi " k' kpf wutkcn' enwngtuA' Regional Studies. " 36*; +. " 3239/32490 j wr u-1lf qkQti B2082: 2122565622442222443; : "

J { o gt. 'U0J 0*3; 82+0The international operations of national firms, a study of direct foreign investment"]Rj F. 'O cuucej wugwu' kpu'kwg'qh'Vgej pqmji { _0j wr -1lj f rfj cpf rgt'p'gvB394308 149597"

Klwuwk. 'W0'Dgtptctf gu. 'T0'E0'(" 'Eqpuqpk' 'H0'N0' *4237+0'P gy "Dtc| krcp" cwqo qvkg" kpf wutkcn' r qite { < Cpcn'uku'qh'vj g'eqpugs wgegu" hqt" mrcn' T(F "dcugf "qp" pgy "eqo gtu" utcvgi kgu'0 International Journal of Automotive Technology and Management. " 15*3+. " 850 j wr u-1lf qkQti B208726 1K C VO 042370892; 4"

Kpej cwur g. 'G0'(' 'I cte'f. 'P 0*4239+0'Gr'eqo r rglq' cwqo qvkl /cwqr ct'kuc" gp'Co 2tlec'Ncvkpc0'Gutcvgi kcu' i rdcrgu. 'tgi kqpcrgu' { 'f gugo r g' q' t'gekpvg0Gp'La encrucijada del autopartismo en América Latina" *r 0349/3: : +0WP F CX'Gf lekqpgu0

Kpf wutkcu' I wfk'0' *4242+0' Industrias Guidi 2010—2020. 60 Aniversario0 j wr -1lpf wutkcu' wfk'0'eqo 0et l'lpf wutkcu' i wfk'k'82/cplxgtuctkq1"

Kqj. 'O 0'Mcv. 'C0'Uj ko qpp. 'I 0'J ctcj wej k' 'I 0'(' "Vc'g qpp. 'R0*423: c+0Nqecik' cvkqp' Rtqeguu'qh' Lcr cp'gug" Cwqo qdkrg'Eqo r cplgu'lp' CUGCP 0 Vj g' Tqrg'qh'Nqecn' Rct w'F gxmqr o gpv'F k'kukqp'cv'Vq { qvc0 Gp'0 0Kqj. 'C0Mcv. 'I 0Uj ko qpp. 'I 0J ctcj wej k' 'R0Vc'g qpp. "Automobile Industry Supply Chain in Thailand" *r 069/84+0Ur t'kpi gt' U'kpi cr qt'g0j wr u-1lf qkQti B2082291; 9: /; : 3/35/4582/9a6"

Kqj. 'O 0'Mcv. 'C0'Uj ko qpp. 'I 0'J ctcj wej k' 'I 0'(' "Vc'g qpp. 'R0*423: d+0Nqecik' cvkqp' Rtqeguu'qh' Lcr cp'gug" Cwqo qdkrg'Eqo r cplgu'lp' CUGCP 0 Vj g' Tqrg'qh'Nqecn' Rct w'F gxmqr o gpv'F k'kukqp'cv'Vq { qvc0 Gp'0 0Kqj. 'C0Mcv. 'I 0Uj ko qpp. 'I 0J ctcj wej k' 'R0Vc'g qpp. "Automobile Industry Supply Chain in Thailand" *r 069/84+0Ur t'kpi gt' U'kpi cr qt'g0j wr u-1lf qkQti B2082291; 9: /; : 3/35/4582/9a6"

Kctuuq. 'K0'(' 'C'kxuco. 'E0'I 0*4227+0'Vgej pqmji { "t'cpuh'gt' hqo "VP Eu"vq" mrcn' uwr r rktu'lp' f' gxmqr lpi " eqwpt' lgu'<C'lw'f { "qh'CD'Xq'k'q'at'wem'lpf "dwa'r r'p'u'lp' Dtc| kn' E'j kpc. "Kpf lc. 'cpf 'O gzleq0'World Development. "33*+. "3547/35660j wr u-1lf qkQti B208238 110y qtrf f gx04227060233"

Kgt. 'C0X0'Uguj cf tk'U0'(' 'Xcuj gt. 'T0*4233+0'Toyota supply chain management: A strategic approach to the principles of Toyota's renowned system00 I J 0

Lceqdu. 'C0L0*4238+0C wqo qvkg' HF Kcpf 'F gr gpf gpv'F gxmqr o gpv'Vj g' Ecug'qh' U'q'xcn'k'ca' E'k' /Tgi k'p'u' lp' 'vj g' Dtc'k'urxc/\ k'kpc" Eqtt'kf qt0' Open Urban Studies and Demography Journal. "2*3+. "3/3; 0 j wr u-1lf qkQti B204396 14574853; 23824232223"

Lc { ctco. 'L0'F cu. 'C0'(' 'P leqrcg. 'O 0*4232+0Nq'nkpi "dg { qpf 'vj g' q'dx'k'w'w'<Wpt'cx'g'kpi 'vj g'Vq { qvc'r tqf wevkqp" u{ uqgo 0' International Journal of Production Economics. " 128*3+. " 4: 2/4; 30 j wr u-1lf qkQti B208238 110kr g04232090246"

Igpucpc. 'C0*4226+0'Empresa y negocios en Asia oriental0WQE0'

Iqj puqp. 'E0*3; : 4+0MITI and the Japanese Miracle: The Growth of Industrial Policy, 1925-19750Ucphqtf" W'pkx'gtuk' 'Rt'gu0'

Mcr r'p'unf. 'T0*4227+0'Globalization, poverty and inequality: Between a rock and a hard place0R'q'rk' { 0'

Mcy cdg. 'P 0' *4235+0' T'qrgu'qh' o w'nk'p'cv'k'p'cn' eqo r cplgu'lp' 'vj g' u'gh' u'w'ug'p'c'p'eg'qh' 'vj g' Vj ck' cwqo qdkrg' kpf wut { <Vj g' ecug'qh'Vq { qvc' O q'qt 'Vj ck' r'p' 0'Waseda Shogaku. "438. "637/66: 0'

Mgo r. 'O 0E0*3; 93-0The pure theory of international trade and investment0Rt gpvkeg/J cml'

Mpli j v.'HOJ 0*3; 43-0Risk, Uncertainty, and Profit0Eco dtkf i g'Wp kxgtukv' 'Rt guo'

Mqtpdrkj w.'L0*4235-0'Gt' o ctzkuo q"cti gpvkpq" {"r" ewgukp" f gr'ecr kcn' o qpqr qrkuc'0 N6madas. Revista Crítica de Ciencias Sociales y Jurídicas."93/; 50j wr u-1lf qkQti B20742; It gxaP QO C04235064565"

Mquceqlh'D0'('Rqtvc.'HO*3; ; 9-0La inversión extranjera directa en la industria manufacturera argentina: Tendencias y estrategias recientes0EGRCNO'

Mquceqlh'D0'Vqf gvec.'L0'('Xkur q.'C0*3; ; 3-0La transformacion de la industria automotriz argentina: Su integracion con Brasil0EGRCNO'

Micupgt.'UOF 0*3; 98-0Uvcg'Rqy gt"cpf "yj g'Ut wewt g'qh'kpvgtpcvkqpcn'Vtcf g0'World Politics."28, No. 30

Micupgt.'UOF 0*3; ; ; 0'Sovereignty: Organized hypocrisy0Rtkpegvq'Wp kxgtukv' 'Rt guo'

Mwrtcu.'O 0*4238-0Los tres kirchnerismos. Una historia de la economía argentina 2003-20150Uki nq'ZZ K0

Mwo ctcuy co {"C0"O wf co dk'T0"Uctepi c."J 0"("Vtkr cyj {"C0*4234-0'Ecvej /wr "utcvgi lgu"lp"yj g'kpf kcp" cwq" eqo r qpgpw" kpf wut {< F qo gwke" hko u0' tgr qpugu" vq" o ctngv' nkdgtck' cvkq'0' Journal of International Business Studies."43*6+."58: /5; 70j wr u-1lf qkQti B208279 ltku0423406"

Mwo ctk'T0'("Uj cto c.'C0M0*4239-0F gvgto kpcpw'qh'hqtgki p'f k'gevlpxguwo gpv'lp'f g'xgnqr kpi "eqwpt lgu'c" r cpgn' f cvc" uwf {"0' International Journal of Emerging Markets." 12*6+." 87: /8; 40 j wr u-1lf qkQti B20832: lKqGO /32/4236/238; "

Mwo qp.'J 0*3; ; 4-0O wmlkpcvkqpcrk' cvkq'qh'Vq {qvc'O qvqt'Eqr qtcvkq'0'Journal of International Economic Studies."6." 2/; ; 0'

Nco r tgej v.'P 0*422; 4-0The impact of the Motor Industry Development Programme (MIDP) on the export strategies of the South African light motor vehicle manufacturers (1995–2008)"Rj F."Wp kxgtukv' "qh'Uqwj 'C'htec'0j wr u-1lvk'0'wplkc'0'e0' c ldkwut gco lj cpf ng B2722 15484 kj gukamo r tgej vap'f h'

Ncpi hkrf Ub kj." M0' (" I tggpy qqf." O 0' T0' *3; ; ; 4-0' F g'xgnqr kpi " Eq qr gtcv'xg" Dw'gt'0'Uwr r rgt" Tgrcvkq'uj kr u'c" Ecug"Uwf {" qh' Vq {qvc'0' Journal of Management Studies." 35*5+." 553/5750 j wr u-1lf qkQti B208333 B689/86: 8022; 8"

Ngg.'D0J 0'("Iq."J 0L0*4229-0'Vj g"o wcvkq'qh'vj g"Vq {qvc"Rtqf wcvkq"U{ ugo <Cf cr v'kpi "yj g"VRU'cv' J {wpf ck'O qvqt"Eqo r cp{0'International Journal of Production Research."45*38+."5887/589; 0' j wr u-1lf qkQti B2082: 2 1224297629234456; 5"

Ngg.'M0*423; 4-0The Art of Economic Catch-Up: Barriers, Detours and Leapfrogging in Innovation Systems" *30'gf 00'Eco dtkf i g'Wp kxgtukv' 'Rt guo'j wr u-1lf qkQti B2082391; 9: 332: 7: : 454"

Ngplp.'X0*3; 39-0El imperialismo, fase superior del capitalismo0'

Nk'Z0'("Nkw'Z0*4227-0'Hqtgki p'f k'gevl'pxguwo gpv'cpf'Geq'p'qo ke'I tqy vj <Cp'k'petgculpi n' {Gpf qi gpqwu' Tgrcvkq'uj kr 0' World Development." 33*5+." 5; 5/6290 j wr u-1lf qkQti B208238 lly qtrf f gx04226083023"

Nkdgt'cp.'O 0D0'('F go gguvt.'N0*3; ; ; 4-0'k'pxgpvt {"Tgf wcvkq'cpf' Rtqf wcvk'v' {"I tqy vj <Nlpmci gu'lp'vj g" Lcr cpgug" Cwqo q'v'xg" kpf wut {"0' Management Science." 45*6+." 688/6: 70 j wr u-1lf qkQti B2084: 9 lo pue067060688"

Nkngt.'L0*4225-0'Toyota Way: 14 Management Principles from the World's Greatest Manufacturer0' O eI tcy /J kn0'

Nkngt.'L0M0'("J qugwu.'O 0*422; 4-0Toyota Culture: The Heart and Soul of the Toyota Way0'Rtkpv'O cwgtu' kpe0'

Nkngt.'L0M0'("O g'gt.'F 0*4228-0The Toyota way fieldbook: A practical guide for implementing Toyota's 4Ps0'O eI tcy /J kn0'

Nkp.'L0' [0'("O qpi c."E0' *4239-0'Beating the Odds: Jump-Starting Developing Countries0'Rtkpegvq' Wp kxgtukv' 'Rt guo'j wr u-1lf qkQti B2087371; 9: 3622: : 68: 3"

Nkr ug {"T0'G0'("Uqj qm ."HO*4227-0'Vj g'k' r cev'qh'k'py ctf'HF Kq'p'J quv'E'q'w'p't'lg'u'<Y j {"Uwej "F l'htg'gpv' C'puy gtu'A' Gp" Does foreign direct investment promote development?" *0'45-0' k'p'ur'k'w'w'g" hqt" k'pvgt'pcvkqpcn'Geq'p'qo leu0'

Nkw.'Y 0'('F lengp.'R0*4228-0'Vt'cpup'cvkqpcn'Eqr qtcvkq'p'cpf "-Qdriki cvgf "Go dgf f gf pguu'<Hqtgki p'f k'gevl' k'pxguwo gpv'lp'Ej k'p'cau'c'wqo qd'k'g'k'pf wut {"0'Environment and Planning A: Economy and Space." 38*9+."344; /34690j wr u-1lf qkQti B20828: k59428"

Nkw.'\ 0*422; 4-0Hqtgki p'f k'gevl'k'pxguwo gpv'cpf"v'gej pqmji {"ur k'm'x'gtu'<Vj gqt {"cpf "gx'k'f'g'peg'0' Journal of Development Economics."85*3/4+."398/3; 50j wr u-1lf qkQti B208238 lly f gx'geq'0422809023"

Nwzgo dwi q. "T0*3; ; : #0La cuestión nacional y la autonomía0GriXlglq"Vqr q0

O ci gg. "F0*4229+0How Toyota Became #1: Leadership Lessons from the World's Greatest Car Company0
Rgpi wkp0

O cksq. "G0'G0*4239+0Diferencias internacionales de productividad en la industria terminal automotriz:
Evidencia a partir de las plantas de ensamblado de Renault y Toyota0
j wr u1ly y y 0ecf go kcQf w1548: 23; IO cksqaGuvgdcpaGj gs wkgmF kgt gpekua kpgt pcekqpcrguaf ga
r tqf wevxf cf agparca kpf wutkca vto kpcmcwqo qtk k agxf gpekacar ct waf garuar rpvuaf gagpu
co drf qaf ga T gpcwma {a Vq { qv"

O cpp. "O0*3; ; 9+0J cu'I mdck k vckp "Gpf gf "y j g'Tkug"cpf "Tkug"qh'y g"P cvkp/UcvgA'Review of International
Political Economy."4*5+. "694/6; 80

O ct kpk "T00 0*3; 95+0Dialéctica de la Dependencia03: 0

O ct vpgl. "L0'K0" ("Lct kmq. "L0'E0*3; ; 3+0Eqqt kpcvkp "F go cpf u"qh' kpgt pcvkpcn' Utcvgi kgu0 Journal of
International Business Studies."22*5+ "64; /6660j wr u1lf qkQti B20279 lr cni txxg0kdu0 6; 252; "

O ctz. "M0*3; 8: #0El Capital0Hqpf q "F g'E wwtc "Geqp»o lec0

O eEmqwf. "L0' H0 *4237+0 Del Jeep al Torino. La historia de IKA, primera automotriz integrada de
Sudamérica0Ngpi wclg'Erctq0

O eO kmcp. "E0*423; +0Qti cpk cvkpcn' k' gpvxf. "Eqtr qtcvg"Utcvgi { . "cpf "J cdku'qh' C wgpvkp < "C "Ecug"Uwf { "
qh' Vq { qv0 Gp" Q0' Ncy tpep" Go gci y ctk "Gf 0: " Strategic Management—A Dynamic View0
kpgvj Qr gp0j wr u1lf qkQti B207994 kpgvj qr gp0 3339"

O eP co ctc. "F0*4233+0 Business Innovation in Asia. Knowledge and Technology Networks from Japan0
Tqwrfg i g0

O gf kpc "Ht g { gt. "L0'G0*423; +0 Convergencia y divergencia de prácticas organizacionales en Empresas
Multinacionales.pdf0KX "Eqpi tguq "kpgt pcekqpcn' f g "Tgrcekqpgu'f gn'Vtcdclq0

O g { gt. "M0'G0 *4226+0 Rgtur gevkgu" qp "O wnkpcvkpcn' Gpvgr tkugu" kp "Go gti kpi "Geqpgo kgu0 Journal of
International Business Studies."35*6+ "47; /4980

O kdgti. "Y 0" ("Y kpmgt. "F0*4235+0 Outsourcing Economics059: 0

O kmgt. "T0*3; ; 6+0I mdckT ("F 'pgvy qtmu'cpf 'rti g/uecng' kppqxcvkpu < "Vj g'ecug'qh'y g'bwqo qdkrg' kpf wut { 0
Research Policy."23*3+ "49/680j wr u1lf qkQti B20238 B226: /9555*; 6+; 2247/8"

O qtf wg. "I 0" ("Uy gpgg { "D0*4242+0P gkx gt "eqtg"pqt "r gtr j gt { < "Vj g'ugctej "hqt"eqo r gvkkxg"cf xcpvci g"kp"
y j" cwqo qvkg" ugo kr gtr j gt { 0 Growth and Change." 51*3+ " 56/790
j wr u1lf qkQti B20333 li tqy 04576"

O qtgtq. "J 0*4235+0 Gn'r tqeguq "f g" kpgt pcekqpcn' cel»p "f g" re" vto c" cwqo qtk k "cti gpvkpc0 H-industri@
Revista De Historia De La Industria, Los Servicios Y Las Empresas En América Latina."1*34+0
j wr u1lf lu0geqp0 wdc0t lpf gz0 j r II / kpf lct veng kxgy I753"

O qti cp. "I 0*4223+0 Vj g'O wnkpcvkpcn' Hto < "Qti cpk kpi "Cetquu" kpuvkwkpcn' cpf "P cvkpcn' F kxkf gu0 Gp "The
Multinational Firm: Organizing Across Institutional and National Divides" *r 0'3/49+0 Qz hqt f "
Wpkxgtukv' "Rt guu0

O qti cp. "I 0*4233+0 T ghr gevkvpu" qp "y j g" O cetq/r qrkku'qh'O letq/r qrkku'0 Gp "Politics and Power in the
Multinational Corporation: The Role of Institutions, Interests and Identities" *r 0' 637/658+0
Eco dtk i g' Wpkxgtukv' "Rt guu0

O qti cp. "I 0*4239+0 Vj g'O wnkpcvkpcn' cu" c "Eqtr qtcvg" Hqto < "C "Et kkecn' Eqpvtdkwkq "It qo "Qti cpk cvkp"
Uwf kgu0 Gp "I 0'dcctu" ("C0'Ur legt "Gf u0: "The Corporation" *r 0'46: /478+0 Eco dtk i g' Wpkxgtukv' "
Rt guu0j wr u1lf qkQti B20239 I; 9: 335; 8: 32470236"

O qwc. "L0' Tqkwgt. "U0'F gihpk "O 0' [qi wgn "I 0" ("O kgu'F ct *q0*4229+0 Ct vkwrcel»p { "f guctqmj "gp' re" vto c"
cwqo qtk k "cti gpvkpc < "O qthqri "f. "kppqxcel»p" { "go r rgg0 Gp "Innovación y empleo en tramas
productivas de Argentina" *r 0'453/497+0 Rt qo gvgq/ WP I U0

P cwwf c. "M0 *422; +0 Ucvgu. "O wnkpcvkpcn' Eqtr qtcvkpu. "cpf " kpuvkwkpcn' Ct tcepi go gpw < "Geqpgo le"
kpgt f gr gpf gpeg" Dgy ggp" lcr cp" cpf " Uqwj geuv' Cuk0 Japanese Economy." 36*5+ " ; 8/3490
j wr u1lf qkQti B204975 IIGU32; 9/425Z582526"

P cwwf c. "M0" ("Vj qdwt p. "L0*4236+0 J qy "o wej "r qike { "ur ceg' ukm'gz kuu" wpf gt "y j "Y VQA' C "eqo r ctevkxg"
uwf { "qh' y j g' cwqo qvkg" kpf wut { "kp" Vj ckrpf "cpf "O crr { uk0 Review of International Political
Economy."21*8+ "3568/35990j wr u1lf qkQti B202: 2I; 8; 44; 2042350 9: 963"

Pcwufc."M0"("Vj qdwtq."I0*4242+0Automotive Industrialisation: Industrial Policy and Development in Southeast Asia*30"gf 00Tqwwrf i g0j wr u-1lf qk0ti B2065461; 9: 264; 667576"

Pcxctgwk'I 0D0("Xgpcdngu."C0L0*4235+00 wnlpcvqpcni'c'pf 'lpf wutkcnr qnle { 00xford Review of Economic Policy."29*4+."583/5: 40j wr u-1lf qk0ti B2082; 5 lqztr li t0238"

Pcxcttq."N0*4242+0Especialización energética y financiarización: Estrategias, desempeño y trayectoria de Pampa Energía (2004-2015)"J0 cguw'c_0Wp UCO 0'

Pghc."L0E0*4239+00 qf qu'f g'f gucttqm."tcdclq {"go r ngq"gp'rc"cti gpvpc"*4224/4239+0Revista Estado y Políticas Públicas."9."; 5/33; 0'

Pqej vgh."J 0*3; ; ; +0Nc'r qf'f'ec'geqp»o lec'gp'rc"cti gpvpc'f'g'hu'p'qx'g'p'w'p'c'b' kcf c'f'g'eqplw'p'q'0Revista Época."I*3+."38/540'

Pqlcn"O'0'D0 *3; ; ; +0Absentee entrepreneurship and the dynamics of the motor vehicle industry in Argentina0Rt'c'gi gt'0'

Pqtjy."F'0*3; ; 2+0Institutions, Institutional Change and Economic Performance0'Eco dt'f' i g"Wpkxgtukf "Rt'guu'0'

Pqxgikp."N0I 0*423; +0Plan de negocio para la creación de un centro de formación de operadores de autoelevadores en Toyota Argentina"J0 cguw'c_0'k'p'k'w'w'q'V'ge'p'q'»'i' leq'f'g'Dw'g'p'q'u'C'k't'gu'0'

Pqxlem"O'0"["qi wgn"i 0"Ecv'c'p'q."C0"("Cnd'q't'p'qj ."H0"*4224c+0P'v'g'x'c'u'e'q'p'h'i'w't'c'e'l'q'p'g'u"gp'g'n'uge'v'q't"cw'q'o'q'q't"cti'g'p'v'p'q'0'Nc"v'p'u'k'»'p"gp't'g"gu't'c'v'g'i'k'u'r't'q'f'w'e'x'c'u" {"'e'q'o'g't'e'k'g'u'0' Cuadernos del Cendes."19."349/3750'

Pqxlem"O'0"["qi wgn"i 0"Ecv'c'p'q."C0'0'0"("Cnd'q't'p'qj ."H0"*4224d+0P'v'g'x'c'u'e'q'p'h'i'w't'c'e'l'q'p'g'u"gp'g'n'uge'v'q't"cw'q'o'q'q't"cti'g'p'v'p'q'0'Nc"v'p'u'k'»'p"gp't'g"gu't'c'v'g'i'k'u'r't'q'f'w'e'x'c'u" {"'e'q'o'g't'e'k'g'u'0' Cuadernos del Cendes."19*6; +."349/3750'

Qj nlp."D0*3; 55+0Interregional and International Trade0J c't'x'c't'f "Wpkxgtukf "Rt'guu'0'

Qj pq."V0*3; ; : +0Toyota Production System-Beyond Large-Scale Production0Rt'q'f'w'e'x'k'k'f "Rt'guu'0'

Qnkxgk.c."N0'H'g'w't {"C0"("H'g'w't {"O 0*423; +0E'q'p'q'p'i "j'g'i'c'r "d'g'y'g'g'p'D'w'p'g'g'u'P'g'y'q't'm'i'c'p'f "X'c'w'g'E'j'c'l'p" C'p'c'n'f'k'u'0' Review of Business Management." 21*Ur'g'e'k'c'n' K'u'w'g'+" 886/8: 40 j wr u-1lf qk0ti B200; 3; l'di p0x431606243"

Qttw."O'0'J'c'o'k'n'q'p."I 0I 0"("U'w'w'k"O 0*3; ; ; +0R'c'w'g't'p'u"q'h"K'p'v'g't/H'k't'o "E'q'p't'q'n'k'p"l'c'r'c'p'g'g'g'D'w'p'g'g'u' 0' Organization Studies."10*6+."76; /7960j wr u-1lf qk0ti B208399 12392: 628; ; 23222627"

Qt'v'k'."T0"("U'ej'q'tt."O 0*4229+0Nc't'g'c't'v'e'w'r'e'l'e'p"f'g'n'd'm'q's'w'g'f'g'r'q'f'g't'gp'rc'r'q'ue'q'p'x'g't'v'k'd'k'f'c'f'0Papeles de Trabajo." 1*4+0 j wr u-1lr'g't'k'g't'k'c'e'v'x'c'0'k'g'u'0'y'q't'f'r't'g'u'u'0'q'o' 4238 B2 lq't'v'k' /{/uej'q'tt/rc/ t'g'c't'v'e'w'r'e'l'e'5d5p/f'g'n'd'm'q's'w'g'f'f'h'

Ql'cy.c."V0 *3; 9; +0Multinationalism Japanese style: The political economy of outward dependency0Rt'k'p'eg'v'q'p"Wpkxgtukf "Rt'guu'0'

Rcpl'q."F'0'I' a' t'k'k'."C0'N'c'x'c't'g'm'q."R0'O'q'p| »p."P'0"("N'c'p'i'c't'f."H0*4239+0Nc'lp'f'w'ut'k'e'c'w'q'r'c't'v'k'c'c't'i'g'p'v'p'c'< Gu'w'f'k'q'f'g'ecu'q'r'c't'c'g'n'c'p'c'n'k'u'k'u'f'g'w'u'f'g'u'c'h'k'u'f'g'k'p'ug't'ek'q'p"e'q'o'g't'ek'c'i'0'G'p"La encrucijada del autoperismo en América Latina"»r 0647/687+0W'p'F'c'x'G'f'le'k'q'p'g'u'0'

Rcpl'q."F'0'N'c'x'c't'g'm'q."R0'I' a' t'k'k'."C0"("E'c'u'k'q'."M0*4239+0G'n'c'w'q'r'c't'v'k'o'q'rc'v'p'q'c'o'g't'ek'c'p'q'gp'v'p'eq'p'v'z'v'q'f'g'r't'q'v'g'e'ek'p'k'u'o'q'i' n'q'd'c'n't'g'u'j'q't'k'p'i {"'f'g'd'k'k'c'o'k'g'p'v'q'f'g'c'e'w'g't'f'q'u't'g'i'k'p'c'g'u'f'g'eq'o'g't'ek'q'0'G'p"La encrucijada del autoperismo en América Latina"»r 03: /96+0W'p'F'c'x'G'f'le'k'q'p'g'u'0'

Rct'f'k."V0*423; +0The role of multinational company strategies in structuring global supply chains in the automotive industry0K'p'v'g't'p'c'v'q'p'c'n'i'N'c'd'q'w't'Q'h'h'g'0'

Rct'g'q'."X0*3; 67+0Manual de Economía Política"»C'v'c'c'c'c'0'

Rct'u'q'p'u."V0*3; 59+0The Structure of Social Action0O'e'l' t'c'y' /J'k'n'0'

Rcx'f'p'g'm"R0*4226+0T'g'i'k'q'p'c'n'f'g'x'g'n'r'q'o'g'p'v'k'o' r'ic'k'v'q'p'u'q'h'H'q't'g'k'i'p'F'k'g'ev'k'p'x'g'u'o'g'p'v'p'k'p'E'g'p't'c'n'i'G'w't'q'r'g'0' European Urban and Regional Studies."11*3+."69/920j wr u-1lf qk0ti B208399 12; 8; 99862625; 364"

Rcx'f'p'g'm"R0*4234+0V'j'g'k'p'v'g't'p'c'v'q'p'c'n'k'c'v'q'p'q'h'E'q'r'q't'c'v'g'f'("F'c'p'f'v'j'g'c'w'q'o'q'v'k'g'k'p'f'w'ut {"T("F'q'h'G'c'u'w' E'g'p't'c'n' G'w't'q'r'g'< GEQP QO K" I QOI TCRJ [0' Economic Geography." 88*5+." 49; /5320 j wr u-1lf qk0ti B208333 110; 66/: 4: 9042340233770z"

Rcx'f'p'g'm"R0*423; +0I' n'q'd'c'n'Rt'q'f'w'e'x'q'p'P'g'y'q't'm'i."H'q't'g'k'i'p'F'k'g'ev'k'p'x'g'u'o'g'p'v'c'p'f'U'w'r'ik'g't'N'k'p'c'n'i'g'u'k'p'v'j'g'k'p'v'g'i'c'v'g'f"R'g't'k'j'g't'k'g'u"q'h'v'j'g'c'w'q'o'q'v'k'g'k'p'f'w'ut {"0' Economic Geography." 94*4+." 363/3870 j wr u-1lf qk0ti B2082: 2 1223522; 704239085; 5535"

Rcxrfp gm "R0" ("fi flcqx" . "R0" *4238 +0 "Nlnci gu" cpf "ur kmxgtu" lp" i mdcnr r tqf vewqp" pgvy qtmu "Hko / rpx grn" cpcnf uku" qh" yj g" E| gej "cwqo qvkg" lpf wut {0 "Journal of Economic Geography." 16 *4+ "553/5850 j wr u-1lf qkqti B2082; 5 lli lndv263"

R2 tgl . " C0" *422; +0 "Nc" uqekmqi "c" geqp»o lec- Qtkpvcelp" vgtlec." cr ctcvq" eqpegr wcnr" { " cur gevqu" o gxf qn»i lequ" f g" wp" eco r q" f g" lpxgwki cel»p" gp" ekpcku" uqekrgu 0 "Ciencia y Sociedad." 34 *3+; 9/ 33; 0"

Rgt gl "Cm cpuk "D0" *4242c +0 "Gri" guctt qmq" f g" r" lpf wutlc" cwqo qvtk "cul vlec" c" vtcx2 u" f g" r" Uqekmqi "c" f grn" F guctt qmq 0 "Guwf lqu" f g" ecuqu" eqo r ctcf qu 0 "Realidad Económica." 49 *552+; 57/880"

Rgt gl "Cm cpuk "D0" *4242d +0 "La política de comercio exterior en el sector automotor argentino. Un análisis sobre el poder empresarial de sus actores y su influencia en el Estado nacional (2002-2015)"] O cgut "c" . "Wpkxgtukf cf "P celqpcnf g" Ucp" O ctv "p_0j wr u-1lf lkwpuco Qf wct lj cpf rg B456789; ; B: 44"

Rgt gl "Cm cpuk "D0" *4243 +0 "Nc" tgeqphi vtecel»p" culo 2 vlec" f g" r" lpf wutlc" cwqo qvtk "cti gpvpc" *3; 98/4223 +0 "Anuario Centro De Estudios Económicos De La Empresa Y El Desarrollo." 15 *35+; 3/33; 0"

Rgt gl "Cm cpuk "D0" *4244 +0 "Nc" ecf gpc" cwqo qvtk "cti gpvpc" c" r ctvt "f g" r" etluku" f g" r" eqpxgt vdkrf cf "Wp" cp" rikulu" f g" lwxqmwel»p" { " lwu" r tkpek rrgu" r tqdrgo cu" *4224/423; +0 "Revista CEPAL." 137. 42; /4530"

Rgt gl "Cm cpuk "D0" (" I tcauq. "I 0" *4239 +0 "Nc" lpf wutlc" wp" dcteq "ukp" vko »p" gp" nqu" vgo r qu" f g" eco dlq 0 "Gp" "El nuevo modelo económico y sus consecuencias" 0 "Gf lekppgu" f grn "EEE 0"

R2 tgl " Ct vlec. " T0" *423; +0 "Rqrflec" lpf wutken" gp" Co 2 tlec" Ncvpc 0 "Gri" ecuq" f g" nqu" tgekpgu" tgi "b" gpgu" cwqr ctvkuu" gp" Cti gpvpc 0 "Revista Galega de Economía." 28 *5+; 950 j wr u-1lf qkqti B2087526 lti g04: 007; 2; "

R2 tgl " Ct vlec. " T0" R2 tgl " K1" o gl . " L0" K0" (" Rgt gl "Cm cpuk "D0" *4244 +0 "T" geqpukf gt lpi "cwqo qvkg" f g" xgnr o gpv" utcvgi lgu" lp" Cti gpvpc" lp" yj g" rki j vqh" yj g" CUGCP "gzt gt kpeg 0 "Revista de Historia Industrial — Industrial History Review." 31 *8+; 9; /3350j wr u-1lf qkqti B208566 lti lli g05: 264"

Rgt gl . " E0" *4232 +0 "Vgej pqmqi lecn" t g x q n w k p p u" cpf " vgej pq/ geqp qo le" r ctcf ki o u0 "Cambridge Journal of Economics." 34 *3+; 3: 7/4240j wr u-1lf qkqti B2082; 5 lli lndv 273"

R2 tgl " K1" o gl . " L0" *423; +0 "Ecf gpcu" i mdcrgu" f g" xcmr "Wpc" t g x k u l p " d k r k q i t a h l e c 0 "Semestre Económico." 22 *73+; 85/: 30j wr u-1lf qkqti B20445; 7 lli lndv 44p73c6"

Rgvuqp. "R0" (" Lqj tk "N0" O 0" *4228 +0 "F tkx lpi" j cto qp { < "Rj kmxqr j { " qh" Vq { qvc" O qvt "Vj ckrpf 0 "Strategic Direction." 22 *33+; 5/70j wr u-1lf qkqti B20832: 1247: 276283292: 8; ; "

Rj gmq. "U0" Dlem "I 0" (" Dctpctf q. "E0" *4239 +0 "Vq { qvc" J kmx < J qy "Uqwj "Cht lecau" vqr" r lemr "dcwrgf" o ctngv" ej cmgpi gu 0 "Emerald Emerging Markets Case Studies." 7 *6+; 3/520j wr u-1lf qkqti B20832: IGGO EU/ 25/4239/2275"

Rlecdgc. "H0" (" "Vj qo cu. "J 0" *4233 +0 "Cp" a rikulu" uqekv epleq" f grn r tqf gevq" f g" r tqf weel»p" cwqo qvtk "mqcn" lpgi tcf c" gp" r" ugi vpf c" r t g u k f g p e k c" r g t q p k v c" *3; 74/3; 77 +0 "Realidad Económica." 261. 4; /790"

Rlecdgc. "L0" H0" *4239 +0 "F gukpf wutlc r k cel»p" { " f g u t w e e l » p " v g e p q / r t q f v e k x c" f v t c p v g" r c" "Anko c" f levcf vtc" e" k l e q / o k k c i c t i g p v p c < " G r i r t q e g u q" f g" e k g t g" f g" l p f w u t l c u" O g e a p l e c u" f g r i G u v c q" *3; 98/3; ; 2 +0 "Realidad Económica." 5 *529+; 5/3450"

Rkpc| q. "I 0" *4237 +0 "El desarrollismo argentino: Una mirada crítica desde la industria automotriz." *3" gtc +0 "Wpkxgtukf cf "I" gpgtcn "Ucto kpvq 0"

Rkpc| q. "I 0" "F lpgtuglp. "P 0" (" E » t f q d c. "H0" *423; +0 "Uqdtg" r" lpf wutlc" cwqo qvtk . "r" r tqf vewkxf cf "rcdqtcn" { " grn gpuc kpvq "et" k l e q 0 "Cuadernos de Economía Crítica." 3 *8+; 323/3470"

Rqmp { k "M0" *3; 66 +0 "The Great Transformation" 0 "Dgceqp" "Rt guu 0"

Rqpvq. "U0" (" "Uwti gqp. "V0" *4236 +0 "Gzr rcklpi" i qxgtpepeg" lp" i mdcnr xcnwg" ej clpu < "C" b qf wnt "yj gqt { / d w k f l p i " g h t v 0 " Review of International Political Economy." 21 *3+; 3; 7/4450 j wr u-1lf qkqti B2082: 212; 8; 44; 2042350 2; 7; 8"

Rqtvc. "H0" "Ucpvcte" pi gmq. "L0" (" "Uej vglpi ctv. "F 0" *4236 +0 "Gzegf gpvq" { " f g u c t t q m q" l p f w u t l c r i n" g p " C t i g p v p c" u k w c e l » p " { " f g u c h f q u 0 " C E F I D A R Documenta de Trabajo." 59. 3320"

Rq| cu. "O 0" f g" nqu" C0" *4226 +0 "Cr qtvgu" { " rlo kcekppgu" f g" r" uqekmqi "c" geqp»o lec 0 "Gp" "La sociología económica: Una lectura desde América Latina" 0 "HNCEUQ 0"

Rtcj crcf. "E0" M0" (" "F q| . "I 0" N0" *3; ; 9 +0 "The Multinational Mission: Balancing Local Demands and Global Vision" 0 "Hgg" "Rt guu 0"

Tco c."XO*4226+0Transferencia de tecnología de corporaciones multinacionales y los procesos de aprendizaje subyacentes. El caso de Toyota Argentina"]O cguw'f'c_0'Wp'kx'gtuk'f'cf'"P'cek'qpcn'f'g' I'pg'gcr'Ucto'kg'p'v'q'0'

Tgeng'p'f'tgg'u."C0'I'g'j'ng'p."D0"("O'ctz."E0*4244+0'K'p'gt'p'c'k'q'p'c'n'd'w'k'p'g'u'u."o'w'k'p'c'k'q'p'c'n'g'p'v'g't'r'k'g'u"cp'f' p'c'k'q'p'c'r'k'q'q'h'y'j'g'eqo'r'cp'{"<'C"eq'p'w't'w'e'x'g't'g'x'k'g'y'q'h'r'k'g't'c'w't'g'0'Business History."64*,"+3789/37; ; 0j'w'r'u'1'f'q'k'q't'i' B2082: 2'1222989; 30'2440'433: 93: "

Tl'ect'f'q."F'0*3: 39+0'On the Principles of Political Economy and Taxation'0'La'j'p'0'w't'c'{'0'

Tq'd'k'p'u'q'p."Y'0'K0*4235+0'Una teoría sobre el capitalismo global: Producción, clase y Estado en un mundo transnacional'0'U'k'i'q'Z'Z'K'0'

Tq'd'k'p'u'q'p."Y'0'K0*4236+0'Global capitalism and the crisis of humanity'0'E'c'o'd't'k'f'i'g'W'p'k'x'g't'u'k'f' 'R't'g'u'0'

Tq'f'c'u'I'q'p'l' 'a'q'l'."U'0'E0*4242+0'Responsabilidad social empresarial y sostenibilidad: Coca-Cola FEMSA y Toyota en Argentina"]R'q'u'i't'c'f'q."W'p'k'x'g't'u'k'f'cf'"g'n'i'q'u'c't'k'q'0'j'w'r'u'1'f'q'k'q't'i' B206: 935'132558a476; 3"

T'w'd'k'q."L0'F'k'u'N'q'w'g'p'eq."O'0'D0'R'g'l' | c't'k'p'k'N0"("D't'k'i'O'c'u'e'c't'g'p'j'c'u."V0*4244+0'Mejorar la productividad argentina: El caso Guidi y la industria automotriz'0'H'w'p'f'c't'0'j'w'r'u'1'f'q'k'q't'i' B206: 935'132558a476; 3"

T'w'i'o'c'p."C00'0*422; +0'The Oxford handbook of international business'0'Q'z'h'q't'f'W'p'k'x'g't'u'k'f' 'R't'g'u'0'

T'w'i'o'c'p."C00'0'("E'q'm'k'p'u'q'p."U0*4226+0'V'j'g'T'g'i'k'q'p'c'n'P'c'w't'g'q'h'y'j'g'Y'q't'r'f'c'u'w'q'o'q'v'x'g'U'g'e'v'q't'0'European Management Journal."22*7+"693/6: 40j'w'r'u'1'f'q'k'q't'i' B206238'11'Q'o'10'422602; 028"

U'c'n'q."O'0"(" \ { 'n'd'g't'd'g't'i'."G0*4237+0'H'q't'o' "I'q'x'g't'p'c'p'eg"v'q'U't'c'v'g'i' {"<'K'p'l'g'e'v'k'p'i' "O'c'p'c'i'g'o'g'p'v'U'w'f'k'g'u"l'p'v'q' "I'q'd'c'n'X'c'n'w'g'E'j'c'k'p'u'0'SSRN Electronic Journal'0'j'w'r'u'1'f'q'k'q't'i' B20435; l'u't'p'0'4852288"

U'c'n'q."O'0"(" \ { 'n'd'g't'd'g't'i'."G0*423; +0'U'w'r'r'ng't' "u't'c'v'g'i' {"k'p"i'q'd'c'n'x'c'n'w'g'ej'c'k'p'u'<'U'j'c'r'k'p'i' "i'q'x'g't'p'c'p'eg"cp'f' "r't'q'h'k'k'p'i' " I't'q'o' " w'r'i't'c'f'k'p'i'0' Socio-Economic Review." 17*5+" 8: 9/9290 j'w'r'u'1'f'q'k'q't'i' B2082; 5'lug't'lo'y'z'26; "

U'c'n'k'u."T0"("U'q't'r'g't."O'0*3; ; 5+0'Les mondes de production: Enquête sur l'identité économique de la France'0'G'f'k'k'p'u'f'g'w'g'q'g'f'g'u'j'c'w'g'u'2'w'f'g'u'g'p'w'e'k'p'eg'u'q'ek'c'rg'u'0'

U'c'p'q."O'0'("F'K'O'c't'w'p'q."N0*4225+0'V't'g'u'ecu'q'u'f'g'c'r'q'p'k'c'ek'p'f'g'r'e't'g'r'ec'ek'p'f'g'g'o'r'ng'q'g'p'c't'i'g'p'v'k'p'c'f'f'0' Revista de la CEPAL'0'

U'c'p'v'c't'e'pi'g'm'q."L0"("R'g't't'q'p'g."I'0*4234+0'V't'c'p'u'h'q't'o'c'ek'q'p'g'u' "t'g'p'c'd'k'k'f'cf'"{"g'o'r'ng'q'g'p'r'e'e'À'r'w'r'k'p'f'w'k't'c'r'0' C'p' 'r'k'u'k'f'g'f'r'e'e'À'r'w'r'c'w'q'o'q'v'k'k' "g'p'r'e'r'q'u'v'Eq'p'x'g't'v'k'k'f'cf'0'Revista De Historia De La Industria, Los Servicios Y Las Empresas En América Latina."6*32+"560'

U'c'p'v'c't'e'pi'g'm'q."L0'Y'{"f'ng't."C0'("R'c'f'p."L00'0*423; +0'R'q'r'f'k'ec'ge'q'p'>'o'k'ec'{"f'g'u'g'o'r'g'o'q'k'p'f'w'k't'c'r'0'Revista de Ciencias Sociales."35."393/3: : 0'

U'c'u'ng'p."U0*3; ; 8+0'Losing Control? Sovereignty in an Age of Globalization'0'

U'c'u'ng'p."U0*4229+0'A Sociology of Globalization'0'Y'0'Y'0'P'q't'v'q'p'("E'q'o'r'c'p'{"0'

U'ej'q't't."O'0*4234+0'Nc" "f'g'u'k'p'f'w'k't'c'r'k'k'c'ek'p' "eqo'q" "g'lg" "f'g'n'r't'q'{"g'e'v'q" "t'g'h'w'p'f'c'ek'q'p'c'n'f'g'r'e" "g'e'q'p'q'o' "f'{" "r'e" "u'q'ek'g'f'cf'"g'p' "c't'i'g'p'v'k'p'c'."3; 98/3; : 50'América Latina en la Historia Económica."19*5+"53/780 j'w'r'u'1'f'q'k'q't'i' B208: 454'k'n'j'g'0'x3; k'50'4: "

U'ej'q't't."O'0'("E'c'u'g'm'u."O'0'10*4237+0'E'w'c'p'f'q'g'n'et'g'eko'k'g'p'v'q' "p'q" "g'u'f'g'u'c't't'q'm'q'0'c'n'i'w'p'q'u'j'g'ej'q'u'g'u'k'k'f'cf'q'u' "f'g'r'e'f'k'p' "o'k'ec'k'p'f'w'k't'c'r'g'p'r'e'r'q'ue'q'p'x'g't'v'k'k'f'cf'0'Cuadernos de Economía Crítica."2."6; /990'

U'ej'q't't."O'0'("Y'c'k'p'g't."C0*4236+0'Nc" "g'e'q'p'q'o' "f'c't'i'g'p'v'k'p'c'g'p'r'e'r'q'ue'q'p'x'g't'v'k'k'f'cf'<'R't'q'd'ng'o'c'u'g'u't'w'e'w't'c'rg'u' " {"t'g'u't'k'ee'k'p' "g'z'v'g't'p'c'0'Realidad Económica."286."359/3960'

U'ej'x'c't|g't."L0*3; ; 7+0'Nc" "t'g'e'q'p'x'g't'u'k'p' "f'g'r'e" "k'p'f'w'k't'c'r" "c'w'q'o'q'v'k'k' "c't'i'g'p'v'k'p'c'0' Ciclos en la Historia, la Economía y la Sociedad."5*,"+7/490'

U'ej'x'c't|g't."L0*3; ; 8+0'La Industria Que Supimos Conseguir"R'c'p'g'v'c'0'

U'ej'x'c't|g't."L0*3; ; : +0'Implantación de un modelo económico: La experiencia argentina entre 1975 y el 2000'0'c' \ 'G'f'k'q't'c'0'

U'ej'x'c't|g't."L0'T'q'l'c'u'D't'g'w."O'0"("R'c'r'c."L0*4225+0'La industria automotriz argentina en perspectiva: La reconversión de la década del noventa como prólogo a la crisis actual'0'E'G'U'R'c'0'

U'g't't'c'p'k'G0*4234+0'G'n'f'g'u'c't't'q'm'q'g'e'q'p'>'o'k'eq'{" "i'q'u'g'u'w'f'k'q'u'q'd't'g'g'n'G'u'c'f'q' {" "i'q'u'g'o'r'g't'g'u'c't'k'q'u'0'W'p' "eq'p'w'c'p'v'g' "f'g'u'c'h'f'j' "r'c't'c' "r'u' "E'k'p'ek'u' "U'q'ek'c'rg'u'0'Papeles de Trabajo."9*C' "q'8+"349/3760'

U'j'c'k'n'j'."C0*4238+0'Capitalism: Competition, Conflict and Crisis'0'Q'z'h'q't'f'W'p'k'x'g't'u'k'f' 'R't'g'u'0'

Uj gnj ct "NcnF cu."MO" ("Uqdkp."I 0*4228+0Ncdqwt "r tcevegu"cpf "y qtnkpi "eqpf kkpqu"lp"VP EU<y g"ecug"qh' Vq {qvc "Mktmnet"kp"Kpf kc'Gp" F 0'Ej cpi "Gf 0."Labour in Globalising Asian Corporations: A Portrait of Struggle" r 0495/524+0Cuk' O qpkqt "T guwteg" Egpvt g'0

Uj ko k w."MO*3; ; ; c+0Le toyotisme0Nc'F²eqwxtvg" ("U{tqu0

Uj ko k w."MO*3; ; ; d+0Le toyotisme0Nc'F²eqwxtvg" ("U{tqu0

Uj ko k w."MO*422; c+0Vj g'Wpegtvclpv' "qh'Vq { qvc'cu'v'j g'P gy "Y qtrf "P wo dgt "Qpg'Ecto cmgt0Gp" The Second Automobile Revolution. Trajectories of the World Carmakers in the XXI Century' Rcn' tctxg' O ceo kmp0

Uj ko k w."MO*422; d+0Vj g'Wpegtvclpv' "qh'Vq { qvc'cu'v'j g'P gy "Y qtrf "P wo dgt "Qpg'Ecto cmgt0Gp" The Second Automobile Revolution. Trajectories of the World Carmakers in the XXI Century' Rcn' tctxg' O ceo kmp0

Uj ko qmy c."MO*Gf 00*422; +0The Birth of Lean: Conversations with Taiichi Ohno, Eiji Toyoda, and other figures who shaped Toyota management0Vj g'Ngcp'Gpvt r tkug'Kpukwng0

Uko qpc | k"C0"lqti g'Ecttgyq"Ucpi kp²u."l0" ("T wuu."O 0*4242+0Vj g'hwwtg"qh'y'j g'cwqo qvkg"lpf wut {< F cpi gtqwu'ej cmgpi gu'qt"pgy "rhg"ht" c"ucwctvgf "o ctngvAInstitute for New Economic Thinking Working Paper Series."3/560j wr u<lf qkqti B2088: 9 lpgy r 363"

Uo kj ."C0*3998+0An Inquiry into the Nature and Causes of the Wealth of Nations0Y 0'Utcj cp"cpf "V0 Ecf gnt0

Uqmqo qp."G00 0*4233+0Hqtgki p'F kt gev'Kpxguo gpv.'J quv'Eqwpt { 'Hvexqtu'cpf 'Geppqo ke'I tqy vj 0Ensayos Revista de Economia."30*3+."63/920

Uqupqxunkj ."U0*4238+0Vq { qvc'O qvt "Eqtr qtcvlp<Qti cpl' cvkpcn'Ewvwt g0Philosophy Study."6*9+."664/ 6760j wr u<lf qkqti B2089487437; /7535423809027"

Uqwtqwkng."l0*3; ; 2+0El complejo automotor en Argentina (Transnacionales en América Latina)."P wgx c' K0 ci gp0

Ur gct."U0" ("Dqy gp."J 0MO*3; ; ; +0F geqf kpi "y'j g'F P C"qh'y'j g'Vq { qvc'Rtqf wvklp"U{ wgo 0Harvard Business Review."77."; 8/32: 0

Ur kpf gpf tglgt."F 0'Dcwgtj cpun"V0'Dgem'O 0" ("Nguo glvgt."H0*4237+0The proximity paradox: Balancing Auto Suppliers' Manufacturing Networks." Vj g" Dquqp" Eqpuwklpi " I tqvr 0 j wr u<ly y y 0r c0t'cwj qhgt(f g'leqpvgpvf co lkr c lf glf qewo gpv'Rwdknc'vklp'p Uwf lgp Uwf lga Vj g Rtkzko k{0 f h'

Utcpi g."U0*3; ; 8+0The Retreat of the State The Diffusion of Power in the World Economy0Eco dtkf i g' Wpkxgtuks' "Rtgu0

Uwti gqp."V0" ("Hqtkf c."T0*4222+0Globalization and Jobs in the Automotive Industry. Final Report to the Alfred P. Sloan Foundation0Kpvt pcvkpcn' O qvt "Xgj keng'Rtqi tco ."Egpvt hqt "Vgej pqmji { ."Rqke { ." cpi " Kpf wut kcn' F gxgnr o gpv." O cucej wugwu" Kpukwng" qh' Vgej pqmji { 0 j wr u<ly y y 0hrgu0vj | 0ej lup4; 635 ll mqdck' cvkqp' 42cpf' 42lqdu' 42kp' 42vj g' 42Cwqo qvkg g' 42Kpf wut { ' 42Hkpcn' 42Tgr qt0 f h'

Uwti gqp."V0l0*4232+0F g'Ecf gpcu'F g'O gtecepe'cu"Eqo o qf kkgu+C"Ecf gpcu'F g'Xcmj<Eqput weekppgu" Vg>tlecu'Gp'Wpc' r qec'F g'I mqdck' cel0p0Eutopia - Revista de Desarrollo Económico Territorial0 j wr u<lf qkqti B2089363 lgwqr kc0042320249"

Uwti gqp."V0l0" ("Dkgudtqgem"l0X0*4233+0I mqdck'xcnw'ej clpu'lp"y'j g'cwqo qvkg'lpf wut { <Cp"gpj cpegf" tqrg"ht" f gxgnr kpi "eqwpt'kguAInternational Journal of Technological Learning, Innovation and Development."4*3445+."3: 3/4270j wr u<lf qkqti B208726 lkvnkf 04233063; 26"

Uwti gqp."V0l0"O go gf qxle."Q0"Dkgudtqgem"l0X0" ("I gtghk"l0*422; +0I mqdck'cvkqp"qh'y'j g'cwqo qvkg" lpf wut { <O clp' hgcwttgu'cpf "v'gpf u0International Journal of Technological Learning, Innovation and Development."2*344+."; /460j wr u<lf qkqti B208726 lkvnkf 0422; 043; 76"

Uwti gqp."V0"Xcp"Dkgudtqgem"l0" ("I gtghk"l0*422: +0Xcnw'ej clpu'pgy qtmu'cpf "enwvgtu" Tghtco kpi " y'j g' i mqdck' cwqo qvkg" lpf wut { 0 Journal of Economic Geography." 8*5+." 4; 9/5430 j wr u<lf qkqti B2082; 5 lgi lndp229"

Uwi k co c."l0" ("Hwko qvq."V0*4222+0Rtqf wv'F gxgnr o gpv'Utcvgi { "kp"Kpf qpguk<C" F { pco ke"Xlgy "qp" I mqdck'Utcvgi { 0Gp'LOJ wo r j tg{ .l' 0Ngergt." ("O 0U0Ucrtpq" *Gf u0."Global Strategies and Local Realities" r 0398/428+0Rcn' tctxg' O ceo kmp "WMOj wr u<lf qkqti B208279; 9: 2555; 99934a: "

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