### Morocco

South Korea

Internal supply network

Modularisation strategy

Supplier parks

Cluster of reference

Strategies for manufacturing efficiency

---

### Purchasing strategy

Purchasing strategy overview

Levels of vertical integration and outsourcing

Purchasing organisation

Purchasing offices

Key purchasing personnel

Purchasing budget

---

### Supplier selection

Supply base development

Major and strategic suppliers

Supplier selection criteria

Working with the Renault-Nissan Alliance

---

### Global sourcing

Policy and plans

EMEA

NAFTA

LATAM

APAC

---

### Pricing policy

Cost-reduction programmes and strategies

Payment terms

Raw-material price management

---

### Quality management

Quality level

Quality management systems

Integration into product development

Management of sub-suppliers

Supplier awards

---

### Technology

Technological positioning

Areas of focus

R&D spending

R&D organisation

Access to supplier technology

Approach to alternative fuels, electrification, and fuel cells

Special vehicle development

---

### Interviews

Christian Vandenhende, senior vice-president, Purchasing, and chairman of the Renault Nissan Purchasing Organization

John Whitfield, senior executive manager for on-site manufacturing and John Barnett, operations director
CK North-East, Calsonic Kansei.................................................................................................................. 89

OEM-supplier survey results...................................................................................................................... 96
  Introduction to the SuRe Index .................................................................................................................. 96
  Methodology ............................................................................................................................................... 96
  Executive summary ..................................................................................................................................... 96
  Profit potential ........................................................................................................................................... 98
    OEM level ................................................................................................................................................ 99
  Organization ............................................................................................................................................. 99
    OEM level ............................................................................................................................................... 100
  Trust ....................................................................................................................................................... 100
    OEM level ............................................................................................................................................. 101
  Pursuit of excellence ................................................................................................................................. 101
    OEM level ............................................................................................................................................. 102
  Outlook .................................................................................................................................................... 102
    OEM level ............................................................................................................................................. 103

SWOT analysis .......................................................................................................................................... 104

Global footprint .......................................................................................................................................... 105

Major suppliers ......................................................................................................................................... 120
  Nissan Qashqai 2014 (Europe) .................................................................................................................. 120
  Nissan Rogue 2013 (North America) ....................................................................................................... 121
  Nissan X-Trail 2013 (Japan) ..................................................................................................................... 123
  Renault Captur 2013 (Europe) .................................................................................................................. 124
  Renault Clio 2012 (Europe) ..................................................................................................................... 126

Figures

Figure 1: Global light vehicle sales, 2007–2013 .......................................................................................... 6
Figure 2: Structure of the Renault-Nissan Alliance ...................................................................................... 10
Figure 3: The Renault Clio Mercosur, introduced in 2012, is a second-generation car with fourth-generation styling updates .................................................................................................................. 11
Figure 4: The Renault Clio V6 from 1999 .................................................................................................... 12
Figure 5: The fourth-gen Renault Clio was introduced in 2012 ................................................................. 13
Figure 6: The all-new, second-generation Nissan Qashqai went on sale in Europe in January 2014 ...... 15
Figure 7: The North American version of the Nissan Tiida was facelifted in 2010 ............................................. 16
Figure 8: The chassis of the latest Nissan Altima is built using an increased proportion of high-strength steel 18
Figure 9: The world premiere of the Nissan Juke in February 2010 ............................................................. 21
Figure 10: The Nissan Figaro was based on the March mini car ................................................................. 22
Figure 11: Unveiled in 2013, The Twin’Z concept is described as offering a preview of the next Renault Twingo 25
Figure 12: The B-platform in the Renault Zoe EV has been reworked to accommodate the battery pack...... 27
Figure 13: The Lada Largus is based on the RF90 version of the B0 platform used in production of the Renault and Dacia Logan MCV (Maximum Capacity Vehicle) estate ................................................................. 28
Figure 14: Indonesia will be the test market for the Datsun Go+, which offers a third row of seating ............. 30
Figure 15: Diagram outlining the basic elements of the CMF module system ............................................. 32
Figure 16: Renault Powertrain global engine and transmission production sites ............................................. 39
Figure 17: Nissan Almera on the B0 line, Togliatti plant, Russia ................................................................. 45
Figure 18: Renault Production System: Four functions of product manufacture ......................................... 54
Figure 19: Structure of Renault-Nissan BV ................................................................................................. 59
Table 1: Key Renault financial performance values................................................................. 6
Table 2: Key Nissan financial performance values................................................................. 7
Table 3: Renault-Nissan Top 10 best-selling models (by Global Nameplate) 2009, 2013, 2018........ 10
Table 4: Ranking of key models in United States mid-size segment (2008, 2013, 2018).......... 19
Table 5: Global sales for Renault and Dacia Duster, 2009–2025 (inc. forecast)....................... 20
Table 6: Global sales for Megane, Focus and Golf (various years, 2000–2025)....................... 23
Table 7: Forecast vehicle output (by platform) at Renault-Nissan Oragadam (Chennai) plant 2013–2020 .... 24
Table 8: Renault-Nissan Alliance platform usage (by manufactured volumes) 2009, 2013 and 2020 .... 26
Table 9: Comparison of European sales for Ford Mondeo, Opel Insignia, Renault Laguna (2006–2020) .... 29
Table 10: Total global production Renault-Nissan Alliance (by brand and group) 2000–2020 .......... 33
Table 11: Renault-Nissan global production plants with forecast 2013 volumes (by brand) ......... 36
Table 12: Top Global EV manufacturers (by volumes) 2013–2020 ........................................... 38
Table 13: Top 20 OEMs in China (by sales) 2013................................................................. 42
Table 14: Annual local sourcing opportunity in the United Kingdom by component area (in GBP million) ... 57
Table 15: SWOT analysis – Renault Nissan ........................................................................ 104
Table 16: Nissan Qashqai 2014 (Europe) Suppliers and Component Data ......................... 120
Table 17: Nissan Rogue 2013 (North America) Suppliers and Component Data ................. 121
Table 18: Nissan X-Trail 2013 (Japan) Suppliers and Component Data ............................... 123
Table 19: Renault Captur 2013 (Europe) Suppliers and Component Data ............................ 124
Table 20: Renault Clio 2012 (Europe) Suppliers and Component Data ............................... 126