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## POSLOVNO POROČILO

### GOSPODARSKEGA INTERESNEGA ZDRUŽENJA ACS, SLOVENSKEGA AVTOMOBILSKEGA GROZDA

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## BUSINESS REPORT

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## NAGOVOR LASTNIKOV

Skupščina je na svojem 5. zasedanju, 26. junija 2003 obravnavala in sprejela predlog računovodskih izkazov za leto 2002 ter potrdila predlog letnega poročila za leto 2002.

Na področju strateškega delovanja smo potrdili STRATEGIJO RAZVOJA GIZ ACS. Za nadaljnji strateški razvoj je potrebna predhodna uskladitev podjetij na določenih ožjih programskih segmentih. Prav tako so za nadaljnji razvoj grozda ključni skupni razvojno - raziskovalni projekti (v nadaljevanju skupni RR projekti), skupno trženje, promocija in internacionalizacija. Pisarna GIZ ACS bo s sredstvi za razvoj in organizacijo še v naprej omogočala finančno podporo pri zagonu skupnih RR projektov članic ACS. Pomagala pa bo članom, nosilcem RR projektov tudi pri pridobivanju sredstev iz razpisa za tehnološke projekte Ministrstva za gospodarstvo.

## POROČILO NADZORNEGA SVETA

Nadzorni svet je tekoče obravnaval delovanje Gospodarskega interesnega združenja ACS, Slovenskega avtomobilskega grozda. Delo nadzornega sveta se je vsebinsko odražalo predvsem v spremljanju uresničevanja dolgoročnega in strateškega razvoja, statusnih sprememb, oblikovanja in preoblikovanja notranje organizacije, načrtovanje rezultatov ter tekoče spremljanje rezultatov poslovanja. Direktor združenja je nadzornemu svetu redno poročal in predstavljal korektne in primerljive podatke za nadzor in odločanje o poslovanju.

Na dveh rednih sejah in dveh korespondenčnih sejah smo z direktorjem dejavno usmerjali pogled v prihodnost in kritično obravnavali dosežene rezultate.

- Na 1. korespondenčni seji nadzornega sveta smo imenovali vodje skupnih infrastrukturnih projektov ACS ter možnost zaposlitve za določen čas pri drugem delodajalcu skladno z določili Zakona o delovnih razmerjih in predhodnim soglasjem matične organizacije pri kateri je vodja projekta zaposlen za določen čas.
- Na 1. redni seji nadzornega sveta smo potrdili strategijo ACS in letno poročilo GIZ ACS za leto 2002. Potrdili smo tudi predlog sprejema novih šestih članov (razvidno v letnem poročilu). Zavzeli smo se tudi za sklic programskega sveta, kot specifičnega organa za nadaljnjo identifikacijo in izvajanje aktivnosti na skupnih RR projektih.
- Na 2. korespondenčni seji nadzornega sveta smo potrdili možnost najema kratkoročnega posojila za zagotovitev plačilne sposobnosti pisarne GIZ ACS. Za zunanjega izvajalca za izdelavo kataloga smo po predhodnem predlogu direktorja ter projektne skupine za promocijo potrdili podjetje Creatim, Ržišnik&Perc d.o.o. iz Šenčurja.

## OWNERS' REPORT

At its 5th meeting in June 26, 2003, the General Assembly discussed and approved the proposed financial statements for the year 2002 and the proposed annual report for 2002.

In terms of strategies, the DEVELOPMENT STRATEGY OF GIZ ACS was approved by the General Assembly. For further strategic development the preliminary consent of companies on certain narrow programme segments is required. In addition, for further development of the cluster of Common Research and Development Projects (Common R&D Projects), common marketing, promotion and internationalisation are of great importance. The GIZ ACS Office is to assure the launch of R&D projects from a financial perspective, namely through means of the development and organisation of ACS. Likewise, the Office is obliged to assist project owners with acquisition of financial support through the invitation for tenders for engineering projects granted by the Ministry of Economic Affairs.

## REPORT OF THE SUPERVISORY BOARD

The Supervisory Board discussed the work of the Business Interest Association ACS, Automotive Cluster of Slovenia. The Supervisory Board observed the realisation of the long-term and strategic development, status changes, formation and reformation of the internal organisation, planning and monitoring of the results of operations. The Manager of the Association regularly reported to the Supervisory Board and presented the Board with correct and comparable data for supervision and decision-making on the operations.

During the two general meetings and two correspondence meetings the Supervisory Board planned future activities and critically reviewed the results yet achieved.

- At the first correspondence meeting the Leaders of common ACS Infrastructure Projects were offered the opportunity of a full-time position at another employer in accordance with the definitions in the Act on Employment Relations and with the preliminary consensus of the mother organisation where otherwise the Leader had a full-time employment.
- At the first general meeting of the Supervisory Board, the ACS strategy and the Business Interest Association ACS annual report 2002 were approved. The Board also approved the proposal to accept six new members (see annual report). In addition, the Board agreed to convene the Programme Council as a specific agency responsible for further identification and carrying-out of the activities on common R&D projects.
- At the second correspondence meeting of the Supervisory Board the notion to accept a short-term loan to assure liquidity of the Office was approved. After the proposal made by the Manager and the Promotion Project group the Board approved the company Creatim, Ržišnik & Perc d.o.o. from Šenčur to be the external contractor in charge of designing the catalogue.

- Na 2. redni seji smo obravnavali finančno poročilo za obdobje I. – IX. 2003 ter sprejeli predlog finančnega plana in sistemizacije pisarne za leto 2003. Nadzorni svet se je zavzel za podporo predlaganim spremembam notranje organizacije, in sicer nadaljnji postopni razvoj v profesionalizacijo. Skupaj z direktorjem GIZ ACS je nadzorni svet izoblikoval predlog gradiva za sklic letne skupščine lastnikov.

Nadzorni svet se je seznanil z letnim poročilo za leto 2003 in poročilom o opravljeni reviziji za leto 2003, ki jo je opravila revizijska hiša Renoma, Družba za revizijo in svetovanje d.o.o. (predhodno ob podpisu pogodbe: revizijska hiša Šager d.o.o., Ljubljana – star naziv podjetja Renoma d.o.o.).

Na podlagi pregleda letnega poročila za leto 2003 in poročila o reviziji, poglobljene razprave vseh članov nadzornega sveta, nadzorni svet ugotavlja:

- Letno poročilo za 2003 omogoča podrobno ugotavljanje finančnega izida in stanja ter uspešnosti poslovanja združenja.
- Od revizorja potrjeni računovodski izkazi odražajo resnično in pošteno sliko poslovanja na dan 31.12.2003, izid njenega poslovanja ter gibanja finančnih tokov za leto 2003, ki so v skladu s Slovenskimi računovodskimi standardi. Poslovni del poročila je skladen z revidiranimi računovodskim izkazi družbe.

Na podlagi navedenega, nadzorni svet nima pripomba na poročilo o reviziji ter letno poročilo za leto 2003. S tem je letno poročilo za leto 2003 s stališča nadzornega sveta sprejeto.

- At the second general meeting the Board discussed the financial report for the period January September 2003 and approved the proposed financial plan and systematisation of the Office for 2003. The Supervisory Board expressed its support to the proposed changes in the internal organisation regarding further gradual development and professionalism. Together with the Manager of Business Interest Association ACS, the Supervisory Board formed a proposal of material for the convocation of the Annual Assembly of the owners.

The Supervisory Board reviewed the 2003 annual report and the auditor's report for 2003, carried out by the Audit Office Renoma d.o.o., Ljubljana – previously named Šager d.o.o.)

On the grounds of having inspected the annual report 2003 and the auditor's report, and after an in-depth discussion by all members of the Supervisory Board, the Supervisory Board states:

- The 2003 annual report allows us to establish the financial situation in detail as well as realise the success of the Association's operations.
- The financial statements, approved by the auditor reflect the true and just image of operations on December 31, 2003, the outcome of the operations and funds flow movements for 2003 which are in accordance with Slovenian accounting standards. The business part of the report is in accordance with the audited financial statements.

On the grounds of the above mentioned, the Supervisory Board has no objection to the auditor's report and the annual report for 2003. Thereby, the Supervisory Board approves the annual report for 2003.

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## POSLOVNO POROČILO GOSPODARSKEGA INTERESNEGA ZDRUŽENJA ACS, SLOVENSKEGA AVTOMOBILSKEGA GROZDA

### SLOVENSKI AVTOMOBILSKI GROZD DANES

Gospodarsko interesno združenje je bilo ustanovljeno leta 2001. Po podpisu ustanovitvene pogodbe in izpolnitvi vseh formalnih in tehničnih pogojev ter minimalne kadrovske zasedbe, je bilo najprej potrebno pristopiti k izvajanju infrastrukturnih projektov. V letu 2002 se je začel proces vzpostavitve infrastrukture na skupnih organizacijskih področjih delovanja (informatika, promocija, dobaviteljske verige, skupna razvojno, raziskovalna in kakovostna infrastruktura, usposabljanja in izobraževanja za specifične potrebe avtomobilske dobaviteljske industrije, kakovost in poslovna odličnost), ki smo ga z vzpostavljeno načrtovano infrastrukturo zaključili ob koncu leta 2003. Vzporedno z navedenim procesom pa se je začel proces identifikacije skupnih razvojno, raziskovalnih projektov za nove proizvode in deficitarne oziroma napredne tehnologije. Ob slednjem je bil razvit skupni proizvod START RELE. Vendar pa se v okviru GIZ ACS v letu 2003 proces identifikacije skupnih RR projektov kontinuirano nadaljuje, kar predstavlja osrednje področje povezovanja članic v virtualna podjetja.

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## BUSINESS REPORT OF THE BUSINESS INTEREST ASSOCIATION ACS, AUTOMOTIVE CLUSTER OF SLOVENIA

### AUTOMOTIVE CLUSTER OF SLOVENIA TODAY

The Business Interest Association was established in 2001. Having signed the founding act, fulfilled all formal and technical terms, and assured a minimum working team, the first step was to launch projects for infrastructure. In 2002 the process of establishing infrastructure began in common activities of organisational fields (information technology, promotion, supply chains, common research and development infrastructure and standard quality, training and education for specific needs of automotive supply industry, quality and business excellence). This was completed at the end of 2003, as was planned through the established infrastructure. In addition, the Board began the process of identification of common R&D projects for new products and deficit or advanced technologies. As a result, a new, common product was developed – START RELE. Further to this success, the process of identification of common R&D projects continued in 2003 within the framework of Business Interest Association ACS. This represented the central field of member-linking in virtual companies.



Gospodarsko interesno združenje ACS, Slovenski avtomobilski grozd se kontinuirano usmerja v iskanje novih priložnosti na rastočih, bolj oddaljenih evropskih (Skandinavija, Ruska federacija, idr.) in neevropskih trgih (Kitajska, Indija) kar predstavlja nove izzive, nova tveganja in inovativne pristope v razvoju novih proizvodov/storitev. Pri tem ACS predvsem igra pomembno vlogo pri vzpodbujanju bazičnih/aplikativnih raziskav in razvoja kompleksnih proizvodov in storitev z višjo dodano vrednostjo ter z načrtnimi analizami in spremljanjem razvoja avtomobilске oziroma dobaviteljske industrije prizadeva k usmerjanju aktivnosti naših članov v razvoj zahtevnejših in kompleksnejših proizvodov. Ob tem ACS veliko pozornost namenja razvoju skupnega informacijskega sistema, ki se prilagaja dinamičnim potrebam, ciljem in interesom članic ACS.

## POSLOVANJE

Globalizacija na vseh področjih poslovanja se neizbežno širi, vključevanje Slovenije v Evropsko unijo kot trga z neizprosno konkurenco, zahteva povezovanje podjetij/organizacij/univerz različnih dejavnosti za krepitev konkurenčnih sposobnosti vseh udeleženih ter povečanje dodane vrednosti in posledično krepitev konkurenčne sposobnosti celotnega slovenskega gospodarstva. Razvoj ACS v nekaterih pogledih prerašča nacionalno (regijsko) raven, zato se usmerja k višji stopnji čezmejnega povezovanja. To terja inovativni pristop v delovanju grozda, ki je bolj problemsko in projektno orientiran z vidika skupnih RR projektov. Z vidika inovativnosti je predvsem poudarek na analitičnem spremljanju inovativnih aktivnosti ter posledično njihovih učinkov (pogoji za izrabo priložnosti, pogoji za osvajanje novosti, akumulacija tehnološkega znanja, benchmarking proizvodov in procesov, ipd.), kar se v nadaljnje odraža z rastjo prodaje (realizacije), rastjo dodane vrednosti na zaposlenega, število letno izvedenih razvojno - raziskovalnih projektov, naložbami v pridobivanje, usposabljanje in izobraževanje kadrov, z rastjo obsega informacijsko podprtega komuniciranja med člani ACS ter z relevantnim okoljem in s prizadevanji za poslovno odličnost po EFQM modelu.

Poleg navedenih strateških ciljev pa je Slovenski avtomobilski grozd svoje poslanstvo v letu 2003 kontinuirano uresničeval z izvajanjem aktivnosti na skupnih infrastrukturnih projektih, in sicer: Informatika, Promocija, Skupna razvojno, raziskovalna in kakovostna infrastruktura, Skupni razvojno, raziskovalni projekti in dobaviteljske verige, Usposabljanje in izobraževanje ter Kakovost in poslovna odličnost.

Visoko usposobljeni strokovnjaki slednjih projektov so s svojim kreativnim delom in požrtvovalnostjo pripomogli k hitrejšemu in učinkovitejšemu ter skupno, uspešnejšemu razvoju, kot tudi k premostitvi velikega razkoraka pri prenosu znanja med gospodarsko in raziskovalno sfero. Posledično raziskovalne institucije pridobivajo najsodobnejšo opremo in sodelujejo na konkretnih RR projektih. Vzporedno s slednjimi aktivnostmi pa se strateški cilji grozda uresničuje tudi s skupnimi razvojno raziskovalnimi projekti, s katerimi se prav tako rešuje problematika prenosa znanja iz področja nosilcev znanja k porabnikom znanja – podjetjem in obratno. Članice že razvijajo skupne proizvode, kot sta PEDALNI SKLOP in SEDEŽ OSEBNEGA VOZILA, nekateri skupni RR projekti pa so v fazi priprave. Navedeno sodelovanje se kaže v sposobnostih uvajanja neprestanih izboljšav v tehnologije, razvoju novih materialov, notranji organizaciji in stalnem prilagajanju spremenjenim razmeram na globalnem trgu. Navedeno spremlja izobražena in motivirana delovna sila, zato povpraševanje po njej stalno narašča. Podjetja se učijo ena od druge kar kaže na visoko stopnjo zainteresiranih skupin za pridobitev konkurenčnega položaja na današnjem nestabilnem trgu.

Business Interest Association ACS, Automotive Cluster of Slovenia is continually looking for new opportunities in expanding, further reaching European markets (Scandinavia, Russian Federation, etc.) and non-European markets (China, India) which represent new challenges, new risks and innovative approaches in the development of new products and services. The role of ACS is mainly to encourage basic and practical research and development of complex products and services with higher added value as well as to stimulate the activities of our members towards developing new more complex products. This is achieved by providing planned analysis and following the development of the automotive supply industry. Besides this, ACS has made an endeavour to develop a common information technology system that meets the dynamic needs, attainment of goals and satisfaction of interests of ACS members.

## OPERATIONS

The trend of globalisation is growing in all the fields of business. Since Slovenia has become a part of the European Union and its market with inexorable competition, it is inevitable for companies, organisations, and universities with different activities to link in order to strengthen their competitiveness and to increase their added value. As a result of this they will also strengthen the competitiveness of whole Slovenian economy. The development of ACS has in some views been growing over national (regional) frames and the Board has therefore been increasingly directing its activities towards establishing links abroad. This certainly requires an innovative approach in the activities of the cluster, which has been problematic and project-oriented from the point of view of common R&D projects. As far as innovations are concerned, the emphasis should be placed mainly on analytical monitoring of innovative activities and their effects (conditions for taking the opportunity, conditions for acquiring new information, accumulation of technological knowledge, benchmarking of products and processes, etc.). This is later reflected in the growth of sales (realisation), the increase of added value per an employee, the number of annually carried out R&D projects, investments in acquiring, training and education of employees, in the growth of communication among the ACS members and relevant environment and in attempts to reach business excellence according to EFQM model.

Besides the above mentioned strategic goals in 2003, the Automotive Cluster of Slovenia continually carried out activities on common infrastructure projects, such as; information technology, promotion, common R&D and quality infrastructure, common R&D projects and supply chains, training and education and quality and business excellence.

Highly qualified experts, whom have been working on these projects, have contributed to faster, more efficient and more successful development. With creative work they have succeeded in filling the gap within the transfer of knowledge between the economic and scientific-research sphere. As a consequence, the institutions have acquired the most up-to-date equipment for their research and have co-operated in concrete R&D projects. Alongside these activities the Board has realised the strategic goals of the cluster also with common R&D projects, in which the problem of knowledge transfer has been solved in such a way that those who have the appropriate knowledge pass it to those who need it – companies and vice versa. The members are currently developing common products like PEDAL BOX and DRIVER SEAT FOR PASSENGER CARS, while some of the common R&D projects are in the preparation stage. Such co-operation results in successful introduction of technological improvements, in development of materials, internal organisation and permanent adjustments to changed conditions on the global market. There is also a growing demand for a well-educated, highly skilled and motivated labour force, which results from such processes. Companies learn from one another and this indicates how interested groups are in achieving a competitive position in today's unstable market.



Poleg prizadevanj za priprave in izvajanje razvojno raziskovalnih projektov za nove proizvode in napredne tehnologije, v ACS potekajo številna prizadevanja za izrabo poslovnih priložnosti:

1. Skandinavski avtomobilski industriji (SAAB, VOLVO, SCANIA) seli večji obseg dobaviteljske industrije in oskrbe od domačih dobaviteljev na območja z nižimi stroški.
2. Na Kitajskem, zlasti na vzhodnem delu, bo avtomobilski industriji imela v naslednjih petih letih največjo rast. Priložnosti vidimo zlasti na območju trikotnika Hong Kong, Macao, Guangzhou.
3. Ministrstvo za avtomobilsko industrijo Ruske federacije pospešuje nabavo avtomobilskih komponent iz območja JV Evrope in Slovenije. V ta namen ACS skupaj z NPAK v Moskvi ustanavlja skupen inženiring center za prenos tehnologij.
4. Poteka sodelovanje med zainteresiranimi člani obeh grozdov (ACS in micro (electronic) cluster) v okviru programa STRAPAMO – tehnološki most med Avstrijo in državami Srednje in Vzhodne Evrope in drugo razvojno in poslovno sodelovanje med člani.
5. Načrtovana naložba v novo vozilo za potrebe Revoza d.d. predstavlja pomembno razvojno priložnost za nadaljnji programski razvoj ter povečanje obsega avtomobilski dobaviteljske industrije v ACS oz. v Sloveniji. Nabor projektov novih proizvodov je za razvojne sistemske dobavitelje znotraj ACS in zunaj njega v Sloveniji prednostna aktivnost.

V letu 2003 je bilo za potrebe razvoja samega sistema grozda ACS in izvedbo infrastrukturnih projektov ter nekaterih razvojno raziskovalnih projektov, izdelkov in tehnologij skupno vloženi okrog 260 MIO SIT, tako v finančnih sredstvih, kot v ovrednotenem strokovnem delu zaposlenih pri članih ACS. Pridobljene razvojne spodbude Ministrstva za gospodarstvo so znašale približno 100 MIO SIT, in sicer v višini 40 % upravičenih nastalih stroškov delovanja pisarne ter aktivnosti skupnih infrastrukturnih in RR projektov.

Zakonski okvir pridobljenih spodbud Ministrstva za gospodarstvo predstavlja podpis Anexa k pogodbi št. 2111-02-030450 o izvajanju razvoja pilotnega grozda, z dne 10.03.2003. Razvojne spodbude Ministrstva za gospodarstvo so bile v letu 2003 pridobljene, ker je:

- Država nadaljnje podprla ACS kot del strategije pospeševanja konkurenčnosti slovenskega gospodarstva;
- Strategija razvoja industrije vozil oz. dobaviteljev industrije vozil rezultat intenzivnega dialoga z državo.

V drugi polovici leta 2003 je bila poslovna politika Slovenskega avtomobilskega grozda usmerjena v identificiranje in oblikovanje skupnih RR projektov, novih proizvodov in tehnologij (virtualnih podjetij) in v mednarodne povezave s podjetji ter institucijami s področja avtomobilski industrije. Pokazala pa se je tudi potreba po začetku interregionalizacije, za kar so pobude za takšno sodelovanje že prisotne, v prihodnosti pa se bodo še okrepile.

Efforts to make preparations and implement R&D projects for new products and advanced technology are not the only activities at ACS. ACS makes endeavours to seize other business opportunities, for example:

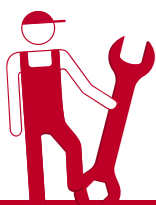
1. The Scandinavian automotive industry (SAAB, VOLVO, SCANIA) is making a switch from local suppliers and sourcing to foreign sources to obtain lower costs.
2. In China, particularly eastern China, the greatest growth in the automotive industry is expected in the following five years. Our best opportunity would be the Hong Kong–Macao–Guangzhou triangle.
3. The tendency of the Russian automotive industry is to strengthen the purchase of car components in South-eastern Europe and Slovenia. For this purpose ACS and NPAK from Moscow together are establishing a common engineering centre for technology transfer.
4. Members of both clusters (ACS and micro (electronic) cluster) have been co-operating within the STRAPAMO programme – a technological bridge connecting Austria, Middle European and East European countries – as well as working on other R&D projects.
5. A planned investment in a new vehicle at Revoz d.d. is an important development opportunity for further programme development and growth in volume of the automotive supply industry of ACS, i.e. Slovenia. The selection of projects for new products is a priority for development of ACS system suppliers and other system suppliers in Slovenia.

In 2003 investments for system development at the ACS cluster, accomplishment of infrastructure projects, R&D projects, products and technologies amounted to about SIT 260 million, and represented funding and expert work carried out by the employees of association members. The Development Incentives received from the Ministry of Economic Affairs totalled about SIT 100 million, which represented a value of 40% of justified costs of the Office operations and activities for common infrastructure and R&D projects.

The legal framework of Development Incentives received from the Ministry of Economic Affairs is presented in the signed annex to the contract No. 2111-02-030450 concerning the implementation of the pilot cluster development of March 10, 2003. The development Incentives from the Ministry of Economic Affairs were obtained in 2003 on the grounds of:

- the state having further supported ACS as a part of the strategy of acceleration of competitiveness of Slovenian economy;
- development strategy in the automotive industry or for its suppliers, resulting from intensive negotiation with the state.

In the second half of 2003, ACS business policy concentrated on the identification and creation of common R&D projects, new products and technologies (virtual companies), and cross-border relations with automotive companies and institutions. In addition, the requirement for the beginning of interregionalisation was also expressed, some incentives for such co-operation are already present and they are to be strengthened in the future.



## VIZIJA

Slovenski avtomobilski grozd hoče s svojimi člani postati zanesljiva mreža dobaviteljev za globalne proizvajalce vozil na izbranih segmentih z izdelki višje stopnje sestavljenosti in dodane vrednosti.

## TRŽENJE

Na področju skupnega trženja grozd ACS predvsem spodbuja srečanja s kupci in konkurenco na poslovnih konferencah (tudi tistih, ki jih organizira GZS). Udeležba treh članov in predstavnikov GIZ ACS na forumu avtomobilskih dobaviteljev v Landavu, Nemčija v organizaciji Bayern Innovativ (420 udeležencev podjetij, organizacij) je ponovno prispevala k vzpostavitvi novih stikov članov in promociji ACS v evropskem prostoru. Zelo odmeven je bil skupni nastop ACS in Me2c (microelectronic clustra) na Avtomobil Forumu v Gradzu. Na Forumu je sodelovalo preko 500 udeležencev iz okrog 280 podjetij in organizacij, kjer so bili vzpostavljeni prvi kontakti s predstavniki slednjih. Forum je potekal v naslednjih tematskih slopih, in sicer: hipoteze in scenariji bodočnosti; mreža avtomobilske odličnosti; mnogo gibanj, malo napredka; priložnosti z razširitvijo EU; problemi financiranja dobaviteljskih verig. Na osnovi enoletnega sodelovanja med ACS in Me2c je bil tak nastop logičen, istočasno pa smo v duhu STRAPAMO projekta s skupno stojnico pokazali naše sodelovanje avstrijski ter drugi strokovni javnosti.

V novembru 2003 so skupno predstavniki ACS sodelovali na poslovni konferenci PANAC v Gyoru, Madžarska.

V sodelovanju z ekonomskimi svetniki slovenskih veleposlaništev zlasti v Skandinaviji in Nemčiji smo se s skupnim nastopom članic ACS ter drugih podjetij/organizacij slovenskega gospodarstva predstavili proizvajalcem vozil.

ACS pa utira tudi nekaj novih poti, ki jih sicer izvozno zelo intenzivni člani ACS še niso osvojili. Tako za potrebe razvoja, kot iskanja novih tržnih priložnosti za člane, ACS vzdržuje stike tudi z nekaterimi tujimi avtomobilskimi grozdi oziroma mrežami v Avstriji, Nemčiji, Italiji, Franciji, Portugalskem, Španiji in Madžarskem, pa tudi s komplementarnimi grozdi kot je (micro) electronic cluster na Avstrijskem Koroškem.

## ORGANIZACIJA

Slovenski avtomobilski grozd kontinuirano izpolnjuje identificirane osnovne interese članov, ki so usmerjeni v rast obsega prodaje avtomobilskih komponent in dodane vrednosti.

## VISION

The Automotive Cluster of Slovenia wishes to develop an intensive and reliable network of suppliers providing products of a higher rank of complexity and added value for global car manufacturers.

## MARKETING

Concerning common marketing, ACS mainly wishes to encourage meetings between buyers and competition at business conferences (including those organised by Chamber of Commerce of Slovenia). The participation of three members and ACS GIZ representatives at the Forum of Suppliers in Automotive Industry in Landau, Germany organised by Bayern Innovativ (420 participants – companies and organisations) again contributed to new contacts established by the members and for the promotion of ACS in Europe. ACS and Me2c (a microelectronic cluster) made an important mutual appearance at the Automotive Forum in Graz. There were over 500 participants at the forum from about 280 companies and organisations. During the forum first contact was established with many of their representatives. The themes at the Automotive Forum were the following: the hypotheses and scenarios for the future; the network of automotive excellence; many movements, little progress; opportunities with the expansion of EU; problems associated with financing supply chains. Such an appearance was a logical consequence of the one-year co-operation between ACS and Me2c, and at the same time by sharing the same location at the forum, we displayed our co-operation in the spirit of the STRAPAMO project to the Austrian industry sector and other professional players.

Representatives of ACS took part in a business conference titled PANAC in Győr, Hungary in November 2003.

With the help of financial advisors at Slovene embassies, especially in Scandinavia and Germany, ACS members and other companies and organisations of the Slovenian economy presented themselves to automotive manufacturers.

In addition, ACS is investigating new processes for strongly export-oriented ACS members. Namely, ACS is making contact with foreign automotive clusters or networks in Austria, Germany, Italy, France, Portugal, Spain and Hungary and also with some complementary clusters like the (micro)electronic cluster in Kaernten, Austria.

## ORGANISATION

The Automotive Cluster of Slovenia continues to fulfil members' identified interests, which are directed towards growth in volume of sales of automotive components and growth of added value.



#### Področja delovanja so:

- Nadgrajevanje in vzdrževanje splošnih infrastrukturnih pogojev delovanja;
- Pospeševanje in pomoč pri nadaljnjem povezovanju in sodelovanju med člani na vseh področjih delovanja;
- Izvajanje strategije ter kontinuiran proces prilagajanja razmeram na domačem in tujem trgu;
- Zastopanje interesov podjetij/institucij/organizacij ter promocija doma in v tujini;
- Spremljanje in uveljavljanje dogovorjenih norm in pravil igre delovanja ACS;
- Spremljanje sistemskih, pravnih in ekonomskih vprašanj ter predlaganje ukrepov;
- Premoščanja razkoraka med znanostjo in industrijo (bazičnih, aplikativnih in industrijskih raziskav);
- Zastopanje dostopa do skupnih informacij in temeljnih znanj ter posredovanje le-teh članov;
- Pospeševanje skupnega delovanja članov pri izboljšanju razvoja novih izdelkov;
- Pospeševanje skupnega delovanja članov za izboljšanje poslovanja na področju organizacije, kakovosti in tehnoloških postopkov;
- Spodbujanje raziskovalnega dela in pridobivanje znanja;
- Iskanje tujih partnerjev za izvajanje skupnih razvojno raziskovalnih projektov;
- Prenašanje prakse gozdenja z domačimi in tujimi gozdi;
- Nižanje cene različnih izobraževalnih programov, skupnih nastopih na konferencah, dostopov do različnih baz podatkov;
- Več sodelovanja med javno upravo, politiko in gospodarstvom.

#### Ustanovni člani (2001):

1. AET Tolmin, d.o.o., Podljudinj 89/a, 5220 Tolmin
2. Agis Plus, d.o.o., Rajšpova 16, 2250 Ptuj
3. Cimos, d.d., Marežganskega upora 2, 6000 Koper
4. EMO – Orodjarna, d.o.o., Bežigradska cesta 10, 3000 Celje
5. Iskra Avtoelektrika, d.d., Polje 15, 5290 Šempeter pri Gorici
6. Iskra ISD, d.d., Savska Loka 4, 4000 Kranj
7. Iskra Mehanizmi, d.d., Lipnica 8, 4245 Kropa
8. PS Cimos TAM Ai, d.o.o., Ptujška cesta 184, 2000 Maribor
9. PINT – Primorski inštitut za naravoslovne in tehnične vede, Marežganskega upora 2, 6000 Koper
10. Rotomatika, d.o.o., Spodnja Kanomlja 23, 5281 Spodnja Idrija
11. Univerza v Ljubljani, Fakulteta za strojništvo, CRV, Aškerčeva 3, 1000 Ljubljana
12. TECOS – Razvojni center orodjarstva Slovenije, Mariborska 2, 3000 Celje

#### Člani sprejeti v letu 2002:

1. DIFA, d.o.o., Kidričeva 91, 4220 Škofja Loka
2. Domel, d.d., Otoki 21, 4228 Železniki
3. Inexa Štore, d.o.o., Železarska 3, 3220 Štore
4. KIK Plastika, d.o.o., Fužine 009, 1241 Kamnik
5. Kovinoplastika LOŽ, d.d., Cesta 19. oktobra 57, 1386 Stari trg pri Ložu
6. LIV Plastika, d.o.o., Industrijska cesta 2, 6230 Postojna
7. Polycorn, d.o.o., Predmost 51, 4223 Poljane nad Škofjo Loko

#### Associated activities include:

- Upgrading and maintenance of general infrastructure conditions for operations
- Acceleration and help in making contacts and co-operation between members in all areas of activities
- Implementation of strategy and a continuous process of adjustment to conditions on the domestic market and abroad
- Representation of the interests of companies, institutions and organisations and promotion of the cluster locally and globally
- Remaining current with and applying the norms and rules of ACS
- Remaining current with systematic, legal and economic issues and submitting purposeful actions
- Bridging the gap between science and industry (basic, applicable and industrial research)
- Providing access to common information and passing it on to members
- Acceleration of co-operation between members on improvement of product development
- Acceleration of co-operation between members on improvement of organisational operations, quality and technological processes
- Encouragement of research
- Locating foreign partners for implementation of common R&D projects
- Exchange of experience in clustering with other Slovenian and foreign clusters
- Lowering prices of various educational programmes, common presentations at conferences and accesses to different data bases
- Facilitating co-operation between public administration, politics and economy.

#### Founding members (2001):

1. AET Tolmin, d.o.o., Podljudinj 89/a, 5220 Tolmin
2. Agis Plus, d.o.o., Rajšpova 16, 2250 Ptuj
3. Cimos, d.d., Marežganskega upora 2, 6000 Koper
4. EMO – Orodjarna, d.o.o., Bežigradska cesta 10, 3000 Celje
5. Iskra Avtoelektrika, d.d., Polje 15, 5290 Šempeter pri Gorici
6. Iskra ISD, d.d., Savska Loka 4, 4000 Kranj
7. Iskra Mehanizmi, d.d., Lipnica 8, 4245 Kropa
8. PS Cimos TAM Ai, d.o.o., Ptujška cesta 184, 2000 Maribor
9. PINT – Primorska institute of science and technology, Marežganskega upora 2, 6000 Koper
10. Rotomatika, d.o.o., Spodnja Kanomlja 23, 5281 Spodnja Idrija
11. The University of Ljubljana, Faculty of Engineering, CRV, Aškerčeva 3, 1000 Ljubljana
12. TECOS – Slovenian tool and die development centre, Mariborska cesta 2, 3000 Celje

#### Members which joined in 2002:

1. DIFA, d.o.o., Kidričeva 91, 4220 Škofja Loka
2. Domel, d.d., Otoki 21, 4228 Železniki
3. Inexa Štore, d.o.o., Železarska 3, 3220 Štore
4. KIK Plastika, d.o.o., Fužine 009, 1241 Kamnik
5. Kovinoplastika LOŽ, d.d., Cesta 19. oktobra 57, 2386 Stari trg pri Ložu
6. LIV Plastika, d.o.o., Industrijska cesta 2, 6230 Postojna
7. Polycorn, d.o.o., Predmost 51, 4223 Poljane nad Škofjo Loko





8. RESISTEC, d.o.o., Krška cesta 8, 8311 Kostanjevica na Krki
9. ROTO Murska Sobota, d.o.o., Gorička ulica 150, 9000 Murska Sobota
10. Semikron, d.o.o., Gabrsko 12, 1420 Trbovlje
11. TBP, d.d., Kidričeva 14, 2230 Lenart
12. Tovarna vozil Maribor, d.o.o., Ptujška cesta 184, 2000 Maribor
13. Univerza v Mariboru, Fakulteta za elektrotehniko, računalništvo in informatiko, Smetanova ulica 17, 2000 Maribor
14. Univerza v Mariboru, Fakulteta za strojništvo, Smetanova ulica 17, 2000 Maribor
15. VESNA, d.d., Einspielerjeva 31, 2000 Maribor

GIZ ACS je v letu 2003 aktivno uresničeval tudi politiko vključevanja novih članov, saj se je število članic ACS povečalo iz 27 iz leta 2002 na 35 članic ACS. Sprejeti so bili naslednji novi člani:

1. Atotech Podnart d.d., Podnart 43, 4244 Podnart
2. Kočevar&Thermotron d.o.o., Ločica ob Savinji 65/d, 3313 Polzela
3. MBB d.o.o. Mengeš, Gorenjska cesta 2, 6230 Postojna
4. Sep d.o.o., Kamnje 41, 8232 Šentrupert
5. TPV TADIS d.o.o. Novo Mesto, Kandijska cesta 60, 8000 Novo Mesto
6. TT Okroglica d.d., Dombrava 1, 5270 Volčja Draga
7. UNIOR d.d., Kovaška cesta 10, 3214 Zreče
8. Univerza v Ljubljani, Naravoslovnotehniška fakulteta, Aškerčeva 6, 1000 Ljubljana

Slika 1 prikazuje organizacijsko strukturo z označenimi relacijami med organi upravljanja in nosilci organizacije delovanja Gospodarskega interesnega združenja ACS, Slovenski avtomobilski grozd.

Slika1



8. RESISTEC, d.o.o., Krška cesta 8, 8311 Kostanjevica na Krki
9. ROTO Murska Sobota, d.o.o., Gorička ulica 150, 9000 Murska Sobota
10. Semikron, d.o.o., Gabrsko 12, 1420 Trbovlje
11. TBP, d.d., Kidričeva 14, 2230 Lenart
12. Tovarna vozil Maribor, d.o.o., Ptujška cesta 184, 2000 Maribor
13. The University of Maribor, Faculty of electrical engineering, computer science and information technology, Smetanova ulica 17, 2000 Maribor
14. The University of Maribor, Faculty of Engineering, Smetanova ulica 17, 2000 Maribor
15. VESNA, d.d., Einspielerjeva 31, 2000 Maribor

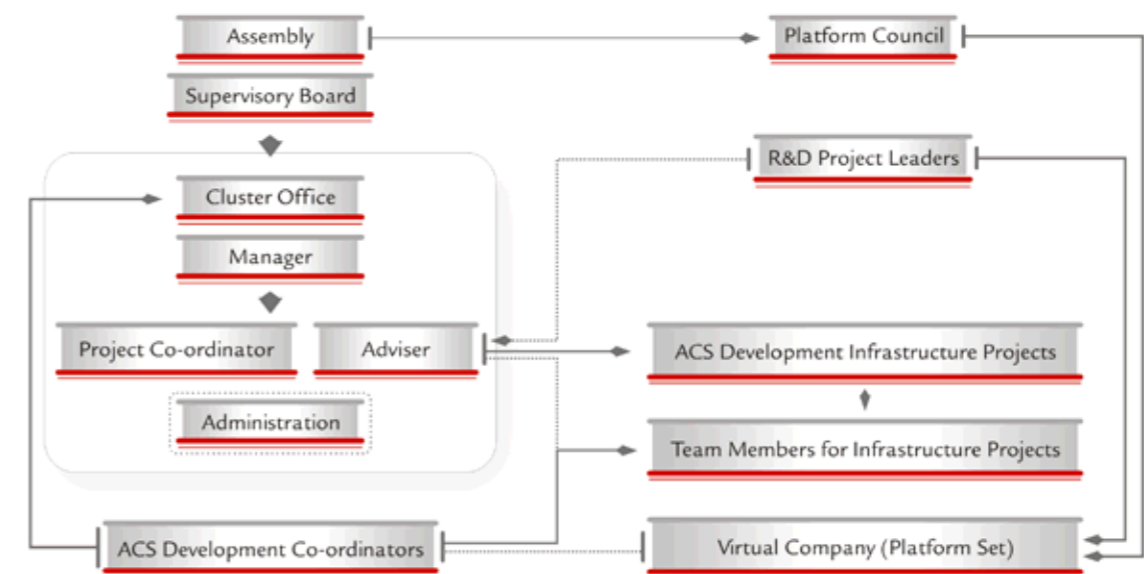
The Business Interest Association, ACS was successful in 2003 in fulfilling its policy of incorporating new members systematically so that the number of ACS members increased from 27 in 2002 to 35 in 2003.

New members which joined in 2003:

1. Atotech Podnart, d.d., Podnart43, 4244 Podnart
2. Kočevar&Thermotron, d.o.o., Ločica ob Savinji 65/d, 3313 Polzela
3. MBB, d.o.o., Mengeš, Gorenjska cesta 2, 6230 Postojna
4. Sep, d.o.o., Kamnje 41, 8232 Šentrupert
5. TPV TADIS, d.o.o. Novo Mesto, Kandijska cesta 60, 8000 Novo Mesto
6. TT Okroglica, d.d., Dombrava 1, 5270 Volčja Draga
7. UNIOR, d.d., Kovaška cesta 10, 3214 Zreče
8. The University of Ljubljana, Faculty of Natural Sciences and Engineering, Aškerčeva 12, 1000 Ljubljana

Figure 1 shows the organisation structure with links between management bodies and process owners of the Business Interest Association, ACS.

Figure 1



Člani Nadzornega sveta GIZ ACS so:

1. prof. dr. Matija Fajdiga, UL – Fakulteta za strojništvo, predsednik
2. Milan Bavec, Iskra Mehanizmi, d.d., podpredsednik
3. Franc Krašovec, Cimos, d.d., član
4. Živko Kavš, AET Tolmin, d.o.o., član
5. Aleš Nemeč, Iskra Avtoelektrika, d.d., član

Direktor GIZ ACS od 01.01.2003 je bil Dušan Bušen.



Members of the Supervisory Board of Business Interest Association, ACS:

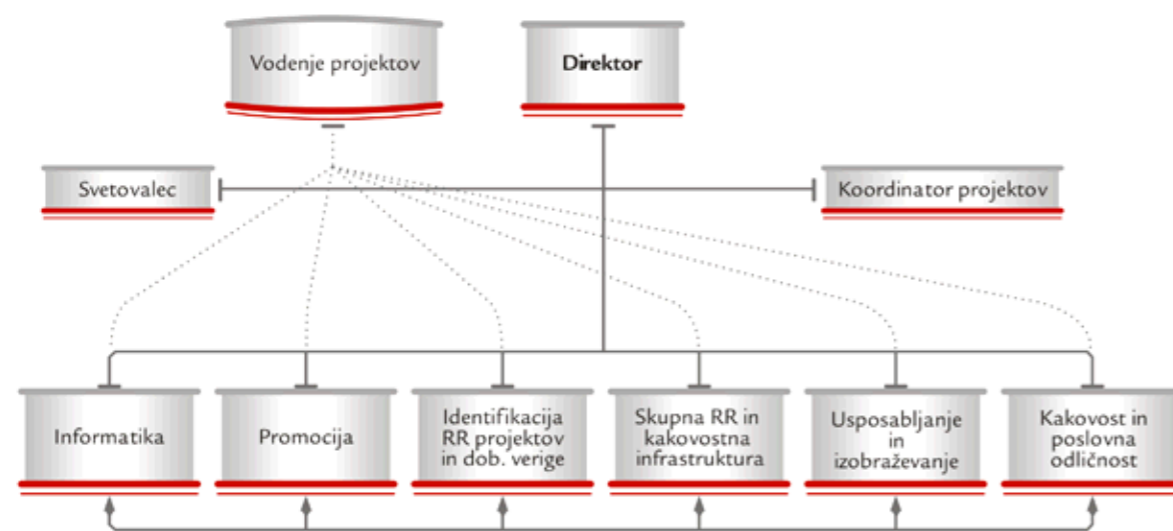
1. Dr Matija Fajdiga, UL – Faculty of Engineering, president
2. Milan Bavec, Iskra Mehanizmi, d.d., vice-president
3. Franc Krašovec, Cimos, d.d., member
4. Živko Kavš, AET Tolmin, d.o.o., member
5. Aleš Nemeč, Iskra Avtoelektrika, d.d., member

From January 1, 2003, the Manager of the Business Interest Association was Mr Dušan Bušen.

## PROJEKTI

Glavne aktivnosti so se poleg razvoja sistema GIZ ACS, kot osrednje komunikacijske točke, izvajale za potrebe skupnih infrastrukturnih projektov, in sicer:

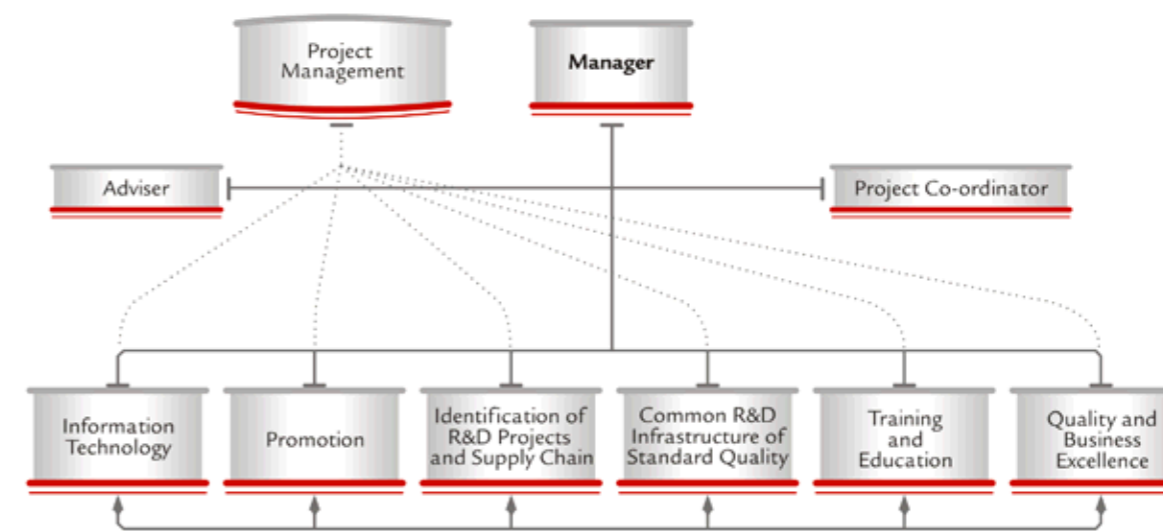
1. Informatika
2. Promocija
3. Identifikacija razvojno raziskovalnih projektov in dobaviteljske verige
4. Skupna razvojno raziskovalna in kakovostna infrastruktura
5. Usposabljanje in izobraževanje
6. Kakovost in poslovna odličnost



## PROJECTS

Apart from the development of the Business Interest Association, ACS, as a central communication point, the greatest importance was attached to the following mutual infrastructure projects:

1. Information Technology
2. Promotion
3. Identification of research and development (R&D) projects and a supply chain
4. Common research and development (R&D) infrastructure of standard quality
5. Training and education
6. Quality and business excellence



Skupni infrastrukturni projekti so v drugi polovici leta 2003 prešli v fazo zaključevanja. Vzpostavljeni so bili osnovni infrastrukturni pogoji za delovanje ACS ter odpravljene vse identificirane pomanjkljivosti, ugotovljene med delovanjem ACS. Kontinuirano pa so se nadaljevale aktivnosti razvoja skupnega informacijskega sistema, ki bo odpravil težave komuniciranja med člani ter omogočil dostop do dokumentacije razvoja grozda ter drugih baz, ki so v fazi razvoju. Prav tako je bil velik dela aktivnosti posvečen promociji na tujih trgih.

Aktivnosti v zvezi z identifikacijo RR projektov pa so se kontinuirano nadaljevale iz leta 2002. V letu 2003 so bili na Programskem svetu za obdobje 2003 in 2004 sprejeti za izvajanje naslednji projekti:

1. INTEGRIRAN ZAGANJALNIK/GENERATOR 42V, 2/6 KW
2. VISOKOTLAČNA ČRPALKA 24 V
3. KOMPLET OPREME VRAT VOZILA
4. INTEGRIRANI SESALNIK ZA AVTO
5. MEHATRONIKA-REGULACIJA ŽAROMETOV; KLIMA LOPUT
6. TRAKTORSKI SEDEŽ
7. VOZNIŠKI SEDEŽ ZA GOSPODARSKA VOZILA S POPOLNO ELEKTRONSKO REGULACIJO
8. RAZVOJ SETA KOMPONENT ZA VEČNAMENSKO VOZILO (REPREZENTANT RHINO – COFA GMBH )
9. NASTAVLJIVI PEDALNI SKLOP
10. PRENOVA VOZILA IN RAZISKAVA MOŽNOSTI OSKRBE IN RAZVOJA S KOMPONENTAMI ZA LETALIŠKI AVTOBUS
11. SKUPNA PONUDBA KOMPONENT ACS ZA OSEBNA VOZILA (REPREZENTANT RENAULT)
12. RAZISKAVE MOŽNOSTI OSKRBE IN RAZVOJA SKUPNE PONUDBE KOMPONENT ZA AVTOBUS MARBUS B3 090 IN MARBUS B4 080
13. IZPOPOLNJEVANJE, INTEGRACIJA IN UVAJANJE SODOBNIH METOD VREDNOTENJA V RAZVOJ AVTOMOBILSKIH DELOV IN SKLOPOV
14. SNOVANJE, IZDELAVA IN TESTIRANJE ORODIJ IN PRIPRAV ZA LASERSKO KROJENE PRIREZE
15. GALVANSKA ZAŠČITA – ZN – FE IN ZN - NI (TEHNOLOGIJA Z BOBNI)
16. START RELE-VKLOPNI
17. STRAPAMO – ČEZMEJNO TEHNOLOŠKO SODELOVANJE ( Z ME2C, AVSTRIJA)
18. RAZVOJ PLAZMA – POLIMERNIH SLOJEV Z VISOKIMI ADHEZIVNIMI KARAKTERISTIKAMI
19. EUROPEAN KNOWLEDGE SOCIETY – EVROPA KNOWS

Tekom leta 2003 so bili identificirani še naslednji novi RR projekti - za izdelke:

1. KLJUČAVNICA Z BOVDEN POTEKOM ZA ODPIRANJE POKROVA MOTORNEGA PROSTORA
2. ODPREŠKI
3. NEMEHANSKI PRETIČNI MEHANIZEM
4. PROJEKT MITSUBA – ZOBNIŠKI MEHANIZMI ZA IZPIRANJE VETROBRANSKIH STEKEL
5. NASTAVLJIVI SEDEŽ ZA OSEBNO VOZILO

In the second part of 2003 the common infrastructure projects reached their concluding phase. The basic infrastructure conditions for the functioning of ACS were established and all the irregularities discovered during the functioning of ACS were eliminated. The development of a common information technology system continued in order to eliminate communication problems between the members and allow access to documentation on the cluster development as well as other data-bases that are currently being prepared. In addition, a lot of attention and activities were dedicated to the promotion on foreign markets.

The process of identification of R&D projects continued from 2002. In 2003 the Programme Council approved the following projects to be carried out in 2003 and 2004:

1. INTEGRATED STARTER/GENERATOR 42V, 2/6 KW
2. HIGH-PRESSURE PUMP 24V
3. CAR DOOR EQUIPMENT SET
4. INTEGRATED CAR VACUUM CLEANER
5. MECHATRONICS – HEADLAMP ADJUSTMENT
6. TRACTOR SEAT
7. ELECTRONICALLY ADJUSTABLE DRIVER SEAT FOR COMMERCIAL VEHICLES
8. DEVELOPMENT OF A COMPONENT SET FOR A MULTI PURPOSE VEHICLE (RHINO – COFA GMBH)
9. ADJUSTABLE PEDAL BOX
10. FEASIBILITY STUDY ON THE PROCUREMENT AND DEVELOPMENT OF COMPONENTS AND SERVICES FOR AN AIRPORT BUS
11. A SHARED RANGE OF ACS COMPONENTS FOR SELECTED PASSENGER CARS (RENAULT)
12. A FEASIBILITY STUDY ON THE PROCUREMENT AND DEVELOPMENT OF A SHARED RANGE OF COMPONENTS FOR MARBUS B3 090 AND MARBUS B4 080
13. ADVANCED STUDY COURSES ON MODERN TECHNOLOGIES, AND THEIR INTEGRATION AND INCEPTION INTO THE DEVELOPMENT OF CAR COMPONENTS AND ASSEMBLIES
14. CONCEPTION, FABRICATION AND TESTING OF TOOLS AND JIGS FOR LASER CUTTING
15. ELECTROPLATING OF METAL PARTS IN BARRELS (ZN-FE AND ZN-NI)
16. START RELAY – SWITCH ON
17. STRAPAMO – CROSS-BORDER TECHNOLOGICAL CO-OPERATION (WITH ME2C, AUSTRIA)
18. TAILOR-MADE ADHESION PROMOTION LAYERS BY PLASMA POLYMERISATION
19. EUROPEAN KNOWLEDGE SOCIETY – EUROPA KNOWS

In 2003 the following R&D projects – for products were identified:

1. LOCK WITH BOWDEN CABLES FOR HOOD OPENING
2. PRESSED SHEET METAL PARTS
3. NON-MANUAL GEARSHIFT MECHANISM
4. MITSUBA PROJECT – GEARS FOR DRIVING UNIT OF WIPER MOTOR FOR CAR'S WINDSHIELD CLEANING
5. ADJUSTABLE SEAT FOR PASSENGER CARS



V letu 2003 pa so bile tudi identificirane deficitarne tehnologije, in sicer:

1. GALVANSKA ZAŠČITA ZN-NI – TEHNOLOGIJA Z OBEŠANJEM
2. PROCESIRANJE MEHATRONSKIH SKLOPOV (UPRAVLJANJE - ELEKTRONIKA)
3. DEBELOSTENSKI KTL (DO 40 MIKRONOV NANOSA)

Nekateri navedeni projekti so bili v letu 2003 že zaključeni, večina pa jih je še v fazi izvajanja. Zaradi usklajevanj s potencialnimi kupci so bili nekateri izmed njih, in sicer: VISOKOTLAČNA ČRPALKA 24V, VOZNIŠKI SEDEŽ ZA GOSPODARSKA VOZILA S POPOLNO ELEKTRONSKO REGULACIJO začasno zaustavljeni.

## RAVNANJE Z LJUDMI

20 Skladno z načelom racionalnosti ter obsegom poslovanja je zaposlovanje potekalo skladno s potrebami. V letu 2003 sta bila v GIZ ACS zaposlena 2 delavca za nedoločen čas in 1 delavec pogodbeno (zunanji svetovalec). Za vodenje skupnih infrastrukturnih projektov ACS smo zaposlili še 5 delavcev za dopolnilni delovni čas (petinski delovni čas), ki so bili sicer zaposleni za polni delovni čas pri matičnih organizacijah (članicah ACS). Za tovrstne zaposlitve so bila pridobljena soglasja matičnih organizacij. Zaposlovanje navedenih vodij projektov je potekalo skladno z določili Zavoda za zaposlovanje o deficitarnosti poklicev, ob tem pa je bil izpolnjen pogoj VII. In VIII. stopnje strokovne izobrazbe. Za izvajanje administrativno tehničnih nalog, vnosa in ažuriranja podatkov je bil za krajše obdobje angažiran 1 študent, za posebne dogodke namenjene promociji ACS pa so bili angažirani še dodatni 3 študentje, ki so izvajali enostavna tehnična opravila.

Izobraževanje je zelo pomembna naloga stimulativenega pomena za učinkovitejše izvajanje opravil posameznega zaposlenega ter uspešnejšega timskega dela. Obseg ponudbe izobraževanja s področja razvoja grozdov je relativno majhen, zato so bile izrabljene možnosti izobraževanja na področjih, ki posredno vplivajo na dejavnost grozdenja. Direktor se je izobraževal na področju strateškega managementa ter usposabljal na področju nemškega jezika. Koordinatorica projektov pa se je izobraževala na področju timskega dela, in sicer je bila delavnica organizirana v okviru ACS. Poleg slednjega pa se je usposabljala za pridobitev dodatnih znanj angleškega jezika.

Stroški izobraževanja so se v letu 2003 gibali v mejah finančnega načrta.

In 2003 also deficit technologies were identified:

1. ELECTROPLATING OF METAL PARTS ON HANGERS (ZN-NI)
2. PROCESSING OF MECHATRONIC KITS (CONTROL-ELECTRONICS)
3. THICK LAYER KTL (COATING THICKNESS UP TO 40 MICRONS)

Some of these projects were concluded in 2003, whereas the majority are still being carried out - due to compromises with potential buyers some of them have been temporarily stopped; namely the HIGH-PRESSURE PUMP 24V and the ELECTRONICALLY ADJUSTABLE DRIVER SEAT FOR COMMERCIAL VEHICLES.

## HUMAN RESOURCE MANAGEMENT

21 In conformity with the principle of rational management and volume of operations, the hiring process answered to current staffing needs. In 2003 the Business Interest Association employed two full-time workers for an indefinite period and one part-time worker (external adviser). For the management of common R&D projects of ACS, five more people were hired for complementary working hours (up to 1 to 5), and who otherwise had full-time employment with organisation members of ACS, and which agreed to this kind of employment. These project managers were employed in compliance with the National Employment Office regulations on deficit professions so that they were professionals with a VIIth or VIIIth level of education. A student employee accomplished technical administration tasks, entering and updating of data. Simple technical tasks for promotion of ACS at special events were carried out by three more student employees.

Education is of great stimulating importance for an individual employee or a team, and this results in more efficient work. The range of training in cluster development is rather limited, therefore we used opportunities for training and education in fields that indirectly influence clustering activities. The Manager received training in strategic management as well as German language. The Project Co-ordinator was trained in team working skills - the workshop being organised within ACS. In addition she attended courses to improve her knowledge of English.

Training expenses in 2003 fluctuated within the financial forecast.

## NAČRTOVANI RAZVOJ



Ob pospešeni organski rasti grozda ACS, poglobljanju mrežnega delovanja (skupne predstavitve proizvajalcem vozil, medsebojno poznavanje tehnologij oz. storitev in njegova izraba za razvojno, proizvodno in tržno sodelovanje, čezmejno oziroma tehnološko sodelovanje s partnerji v EU, investiranje razvojnih in sistemskih dobaviteljev v proizvodnjo modulov in sistemov s partnerji v Sloveniji,..) bo za rast grozda in njegovo vplivanje na razvoj avtomobilskega sektorja v Sloveniji usoden razvoj avtomobilske industrije in njeni globalni razvojni trendi. Ti se že danes kažejo v zaostrenih kriterijih za izbiro dobaviteljev, v globalni konkurenci (avtomobilski koncerni izbirajo najboljše dobavitelje iz svetovnega nabavnega trga), in sicer: kakovost, inovativnost, tehnologija, logistika, storitve (servisi), konkurenčnost in fleksibilnost dobaviteljev.

Dobaviteljem se odpirajo tudi nove priložnosti s pospešenim prelaganjem kompetenc od proizvajalcev vozil na dobavitelje. Ta proces zmanjševanja deleža razvoja modulov in integracije dobaviteljev nižjih stopenj vgradnje od OEM na dobavitelje poteka pospešeno. Od dobaviteljev pa zahteva visoko inovativnost in obvladovanje stroškov, ob intenzivnem investiranju v tehnologijo oziroma proizvodne in storitvene procese ter mehke razvojne dejavnike. Priložnosti za razvoj dobaviteljske industrije nudijo tudi prvenstvene razvojne zahteve (kupcev) vozil: individualizacija vozil, informacijska tehnologija, varnost in udobje, varovanje okolja.

V teh pogojih bo ACS razvijal in prilagajal svojo strukturo, aktivnosti in deloval predvsem kot inovativni grozd. Upoštevati bo moral tudi prognostrirana tržna gibanja na trgu vozil, ki območjem NAFTA, Zahodni Evropi in Japonski (triada) obetajo marginalno rast. Rastoči trg je v Vzhodni Evropi, Aziji in zlasti Kitajski. Grozd ACS bo s spremljanjem dogajanj na globalnem in bližnjem okolju avtomobilskega sektorja ter izvajanjem skupnih in dopolnilnih razvojnih aktivnosti svojim članom odpiral nove razvojne in tržne priložnosti ter zmanjševal tveganja velikih tržnih in tehnoloških premikov v prihajajočem obdobju.

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## POROČILO POOBlašČENEGA REVIZORJA

Poslovno poročilo za leto 2003 je skladno z revidiranimi računovodskimi izkazi.

## PLANNED DEVELOPMENT

Due to the accelerated growth of the cluster, ACS intensified network activities through common presentations to car manufacturers, common acquaintance with technologies and services and its usefulness for developmental production and marketing co-operation, cross-border, technological co-operation with partners in EU, investments of development and system suppliers into production of modules and systems with partners in Slovenia. The development of the automotive industry and its global development trends will be of paramount importance for the growth of the cluster and its influence on the development of the automotive sector in Slovenia. Global development trends can already be identified as a stricter criterion for the choice of suppliers, as global competition regarding: quality, innovation, technology, logistics, services, competitiveness and flexibility of suppliers. Automotive concerns are choosing the best suppliers on the world supply market.

With accelerated transfer of competence from producers to suppliers, suppliers are continually gaining new opportunities. This process of decreasing of the development module part and integration of suppliers of low level implantation from OEM to suppliers is being accelerated. This demands a high level of innovation and cost control from suppliers with intensive investment in technology that includes production and service processes, as well as soft development factors. Opportunities for the development of a supply industry can also be seen as one of the first development demands (of buyers) of vehicles: customisation of vehicles, information technology, safety and comfort and environment protection.

In such conditions, ACS will develop and adjust its structure and activities and function above all others as an innovative cluster. ACS must take into account the predicted market trends of the automotive market, which currently predict marginal growth for the NAFTA areas, Western Europe and Japan. Major growth markets exist in Eastern Europe, Asia and especially China. The ACS cluster will, by following the activities on the global market and local environment of the automotive sector and implementation of common and complementary development activities, open new development and market opportunities for its members. It also aims to reduce the risks of major market and technological activities in the oncoming period.

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## INDEPENDENT AUDITOR'S REPORT

The business report for 2003 is in accordance with the audited financial statements.

## POMEMBNEJŠI POSLOVNI DOGODKI, KI SO NASTOPILO PO KONCU POSLOVNEGA LETA 2003

Osnovna dejavnost GIZ ACS je podpora članov pri vključevanju v svetovno industrijo vozil z izdelki višje dodane vrednosti. ACS zlasti pospešuje razvoj dejavnosti članov ter njihovo uspešnost poslovanja s skupno promocijo pri proizvajalcih vozil in sistemskih dobaviteljih z ustreznimi raziskavami in povezovanjem s strokovnimi, podpornimi in znanstvenimi institucijami doma in v tujini.

Pomembnejših poslovnih dogodkov, ki so nastopili po koncu poslovnega leta 2003 in, ki bodo vplivali na razvoj dejavnosti članov ter grozda kot celote so:

1. Organizacija poslovne koference v Moskvi, pospešene priprave na konferenco v Sizrinj (organizirana medpodjetniška srečanja med slovenskimi in ruskimi podjetji), priprave za skupinski sejmski nastop na sejmu »Avtokomponente« v maju 2004 v Moskvi ter priprave za zaključno uskladitev ustanovne pogodbe skupnega inženiring centra v Moskvi;
2. Predstavitve ACS na delavnici »World class manufacturing in Europe«, kjer smo dobili obilo pohval za predstavljenje dosežke na področju izboljšanja konkurenčnosti tako s strani organizacije »Enterprise Ireland« kakor tudi organizatorja EU-Japan Centra, pa tudi nekaterih drugih udeležencev. Predstavljeni smo bili kot edina organizacija na strani držav pristopnic EU;
3. Priprava in organizacija skupinskega nastopa s stojnico na forumu JAMA-CLEPA, ki bo 20. in 21. aprila 2004 v Goeteborgu, Švedska (forum japonskih proizvajalcev vozil in evropskih proizvajalcev avtomobilskih komponent);
4. Priprave na obisk članov uprave podjetja MAGNA, Graz v Sloveniji;
5. Priprava na poslovno konferenco v okviru projekta »STRAPAMO«, ki jo bomo skupaj z grozdom Me2c organizirali 21. in 22. oktobra 2004 v Villachu, Avstrija;
6. Priprava na skupinski nastop na sejmu »Automechanika Shanghai«, ki bo decembra 2004 na Kitajskem;
7. Priprave na obisk podpredsednika in direktorja podjetja INFINEON, ki bo obiskal podjetja ACS, katera se ukvarjajo z izdelavo elektronskih in električnih komponent za avtomobilsko industrijo. Predstavil bo tudi pogled na trende v avtomobilski industriji, predvsem z vidika povečevanja deleža mikroelektronike in mehatronike v vozilih. Skladno s slednjim se bodo odvijali pogovori o možnostih nadaljnjega sodelovanja;
8. Priprave na skupni obisk članic grozda ACS in Me2c v grozdu Silicon Saxony na Saškem;
9. Priprave na predstavitev ACS z referatom na konferenci AKJ Congress v Saarbruecknu, Nemčija;

## IMPORTANT BUSINESS EVENTS THAT TOOK PLACE AFTER THE END OF THE BUSINESS YEAR 2003

The principal activity of GIZ ACS is providing support for its members in their integration into the world automotive industry with products of higher added value. The aim of ACS is especially to accelerate the development of its members' activities and increase their success in business with common promotion to car manufacturers and system suppliers with adequate research and co-operation with expert, support and scientific institutions in Slovenia and abroad.

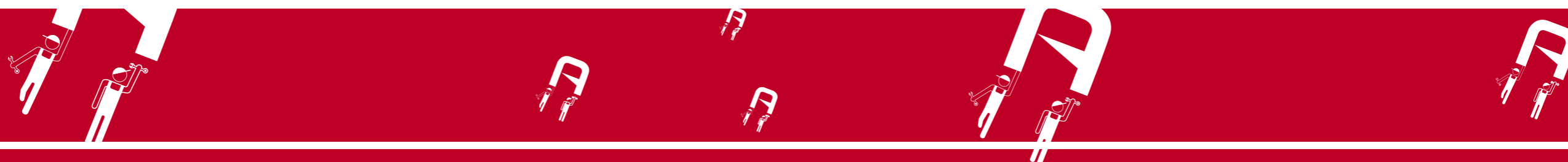
Important events that took place after the end of business year of 2003 and will have an influence on the development of the member's activity and the cluster as a whole are:

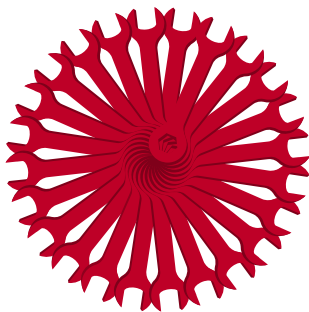
1. The organisation of a business conference in Moscow, preparations for the conference in Sizrinj (organised meetings between Slovenian and Russian companies), preparations for the common presentation at the fair "Avtokomponente" in May 2004 in Moscow and preparations for the final reconciliation of the memorandum of association of common engineering centre in Moscow.
2. Presentation of ACS at the workshop "World class manufacturing in Europe" where ACS received praise for the achievements presented in the field of competitiveness improvement from the organiser "Enterprise Ireland" and EU - Japan Centre as well as from some other participants. ACS was presented as the only EU accession country organisation.
3. Preparation and organisation of the common presentation at the stall at the forum JAMA-CLEPA, which took place on April 20th and 21st 2004 in Goeteborg, Sweden (forum of Japan car manufacturers and European manufacturers of automotive components).
4. Preparations for the visit of Management Board members from MAGNA, Graz to Slovenia.
5. Preparations for the business conference within "STRAPAMO" project, which will take place on October 21st and 22nd 2004 in Villach, Austria. The conference will be organised by ACS and Me2c.
6. Preparations for the common presentation at the "Automechanika Shanghai" fair, which will take place in China in December 2004.
7. Preparations for the visit of the Vice-President and the Manager of the INFINEON company who will visit companies, ACS members, which are involved in manufacture of electronic and electrical components for the automotive industry. He will also present his opinions concerning trends in the automotive industry, especially in connection with increased microelectronic and mechatronic parts in vehicles, according to which we will continue our discussion related to possibilities of further co-operation.
8. Preparations for the common visit of ACS and Me2c members at the cluster Silicon Saxony in Saxony.
9. Preparations for the ACS presentation with a report at AKJ Congress conference in Saarbruecken, Germany.



10. Priprave na o 2. posvetovanje ACS »Razvojni trendi v avtomobilski dobaviteljski industriji«, ki bo 13. maja 2004 v Ljubljani. Vzporedno bo potekala poslovna konferenca z medpodjetniškimi srečanji med podjetji ter razvojnimi institucijami iz srednje in vzhodne Evrope;
11. Aktivno sodelovanje pri prijavi projekta »NEAC - Network of European Automotive Competence Clusters« na razpis EU Interreg 3C (sodelujejo avtomobilske regije vse Evrope), pri katerem gre za mrežo avtomobilskih grozdov Evrope na skupni informacijski osnovi;
12. Aktivno sodelovanje pri prijavi projekta »Dynovation Net« na javni razpis 6. okvirnega programa EU – finančni instrument Collective Research (sodelujejo avtomobilske regije vse Evrope oziroma mrežna povezanost grozdov Evrope);
13. Priprave na javni razpis Ministrstva za gospodarstvo za spodbujanje razvoja grozdov za obdobje 2004-2005;
14. Priprave na javni razpis Ministrstva za gospodarstvo za pridobitev sredstev iz Evropskega sklada za regionalni razvoj. Interes za predstavitev celovitega projekta je ACS izkazal že z oddajo dokumentacije na javno povabilo Ministrstva za gospodarstvo ukrepa »INOVACIJSKO OKOLJE« prednostne naloge št. 1: Spodbujanje proizvodnega sektorja in konkurenčnosti dne, 19. septembra 2003;
15. Izveden davčni postopek v zvezi s poslovanjem GIZ ACS ter sprejemljivosti in prilagodljivost davčni zakonodaji v katerem niso bile ugotovljene nobene davčne nepravilnosti;
16. Priprave na Skupščino GIZ ACS (predvidoma bo v juniju 2004), vključno s sprejemom novih članov.

10. Preparations for the 2nd ACS conference “Development trends in automotive supply industry”, which took place on May 13th 2004 in Ljubljana. This was organised together with a business conference with meetings between companies and development institutions from Middle and Eastern Europe.
11. Active participation in tendering the project “NEAC – Network of European Automotive Competence Clusters” of EU Interreg 3c (participating automotive regions from all Europe, which are associated in networks of automotive clusters of Europe with a common information basis).
12. Active participation in tendering the project “Dynovation Net” of the 6th EU frame programme – financial instrument Collective Research (participating automotive regions from all Europe – network of European clusters).
13. Preparations for the tender by Ministry of Economics for encouraging the development of clusters in the period 2004-2005.
14. Preparations for the tender by the Ministry of Economics for gaining assets from the European Regional Development Fund. ACS had expressed its interest for the presentation of the complete project by submitting the documents in response to the Ministry of Economics’ public call for competition according to the provision: “INNOVATON ENVIRONMENT” Priority 1: Encouraging the production sector and competitiveness on September 19th 2003.
15. Tax processes regarding the operations of GIZ ACS and acceptance and adaptability to tax legislation found no irregularities.
16. Preparations for the GIZ ACS Assembly (June 2004) when new members were accepted.





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