Getting to Win-Win
How Toyota Creates and Sustains Best-Practice Supplier Relationships
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Much has been written about “the Toyota Way.” Why, then, add to that extensive body of publications? The answer is that many automotive executives we’ve talked with have raised questions that the literature doesn’t clearly answer. Executives at OEMs want to know how to emulate Toyota’s example in creating a base of suppliers that are committed to continuous performance improvement, unshakably loyal, integrated into an extended network, and generating stable financial results. And executives at automotive supply companies want to know how to participate in such relationships. What principles and techniques does Toyota employ to create such a supply base and leverage it so effectively? And how do Toyota’s suppliers, in turn, experience that unique relationship?

We recently undertook a broad study to uncover the factors that set Toyota apart from the rest of the industry. As part of that effort, we conducted extensive interviews with OEMs, suppliers, and industry experts around the globe. Their experience and insights are reflected in this report.

How Toyota’s Supplier Relationships Are Distinctive

Many surveys have confirmed that Toyota ranks as suppliers’ preferred OEM—the one with which they would most like to do more business. The reasons they cite for this preference are manifold: Toyota allows them acceptable returns on their investments, is reliable in honoring its contract price agreements, supports suppliers in improving their operations, respects their capabilities and intellectual property, and provides an equitable split of any cost reductions they achieve. The fundamental principle guiding all these behaviors is simple but profound: treat all suppliers fairly.

Little wonder, then, that in many of our interviews Toyota’s suppliers began by stating immediately that the relationship is just very different from the relationship with other OEMs. But how, precisely, does Toyota go about cultivating that unique relationship? The answer is not as simple as implementing a few clear-cut processes. It lies in something both subtler and deeper: the culture and mindset with which fundamental principles are practiced.

In addition to treating all suppliers fairly, Toyota’s approach to supplier relations rests on three other principles: establish long-term supplier partnerships, retain critical new-product development (NPD) and design knowledge in-house, and take responsibility for suppliers’ development and growth. In translating these principles into action, Toyota’s example offers particularly valuable lessons in three broad areas: supplier selection, supplier collaboration, and supplier development. (See Exhibit 1, page 2.)
Supplier Selection: Toward Long-Term Partnerships

Toyota is constantly searching for new suppliers that can provide industry leadership on cost, quality, and technology. However, the company will select only those suppliers that are willing to establish long-term partnerships with Toyota and that have the ability to be successful in such relationships. Toward that end, Toyota imposes very stringent selection criteria and undertakes a long and arduous selection process. The goal is to ensure that every supplier meets Toyota’s requirements in terms of cost, quality, and technology, and also demonstrates a commitment to and a good philosophical fit with Toyota.

Toyota invests significant time and effort—often three to five years—in exploring a relationship with a supplier before signing a first contract. The goal is to build a solid working relationship, addressing and resolving all critical issues before awarding a contract. This investment pays off: once a relationship is in place, Toyota can expend far less effort and incur far lower transaction costs during actual production than would otherwise have been the case. This is because Toyota and the supplier have already sorted out the kinds of challenges that typically arise during production, such as misunderstandings and misalignments in expectations. Suppliers describe this managerial approach not only as highly conservative and risk averse but also as firmly focused on partnership and the long term. Toyota’s approach can go as far as discussing every detail of a proposed workflow and machine setup before the supplier is even offered the opportunity to bid on a contract. Several years of these detailed discussions can precede a first contract, even for a relatively simple, low-tech product, such as wheel weights. Toyota’s extraordinary attentiveness extends to all suppliers, regardless of the products they provide.

To manage this lengthy supplier-selection process, Toyota deploys a cross-functional team consisting of representatives from purchasing, engineering, manufacturing, and management. Although these

Exhibit 1. Toyota’s Success with Suppliers Rests on Four Principles

<table>
<thead>
<tr>
<th>Toyota’s sourcing principles</th>
<th>1. Treat all suppliers fairly</th>
<th>2. Enlist suppliers that value long-term partnerships</th>
<th>3. Retain in-house all levels of critical NPD and design knowledge: components, systems, and vehicle integration</th>
<th>4. Take responsibility for suppliers’ development and growth</th>
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**Stringent selection criteria**
- Long and meticulous selection process
- Engagement of a cross-functional Toyota team from the start
- Insistence on suppliers’ commitment to and philosophical fit with Toyota

**The world-class Toyota NPD process**
- Full in-house capacity to perform vehicle systems integration, which reduces dependency on suppliers
- Streamlined NPD process that optimizes interactions with suppliers during design, improving productivity for both Toyota and its suppliers
- Systematic leveraging of supplier expertise

**Toyota Production System expertise**
- Extensive monitoring of suppliers’ performance, involving suppliers’ senior management
- Thorough quality audits every six months
- Rapid problem resolution addressing root causes
- Development of suppliers’ capabilities through knowledge-sharing networks

*Source: BCG analysis.*
individuals work together very closely to qualify a supplier, each has a distinct role to play. Purchasing personnel identify new suppliers and are responsible for assessing suppliers’ competitiveness on cost, as well as their quality-assurance processes and procedures. Engineering team members assess suppliers’ technological capabilities and potential for innovation. Manufacturing team members assess suppliers’ production capabilities and potential for implementing the Toyota Production System.

Management team members evaluate suppliers’ strength and commitment in two areas: senior managers’ understanding of and involvement in operational details, and the company’s philosophical fit with Toyota. In evaluating a supplier’s philosophical fit, Toyota looks for five key elements: kaizen (or continuous improvement), consistent reasoning, cross-functional teaming, sharing of information and knowledge, and responsiveness. (See Exhibit 2.)

**Kaizen.** Is the supplier willing to improve its performance continuously? Does it have the ability to analyze the root causes of all problems and take the necessary corrective actions? Is it prepared to be permanently dissatisfied with the status quo and to always work on doing things better?

**Consistent Reasoning.** Does the supplier use fact-based decision-making processes? Does it have a deep understanding of the reasons behind each product-design decision? Can it handle the fact that Toyota’s engineers constantly ask highly specific and probing questions in their quest to understand every detail of the supplier’s production processes, as well as the reasoning behind every product specification?

**Cross-Functional Teaming.** Does the supplier have a team-based internal working culture? Is the supplier’s management involved in all operational matters? Does the supplier practice meticulous cross-functional coordination on all issues, no matter how narrow?

**Sharing of Information and Knowledge.** Is the supplier willing to share details about its costs, quality, and technology? Is there transparency and openness in all discussions?

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**Exhibit 2. Suppliers’ Philosophy Must Fit with Toyota’s**

*“When working with Toyota, you can never be satisfied with the status quo—you need to always work on doing things better.”*  
—A German supplier in Japan

*“Toyota is very well coordinated internally. Every function at Toyota is aware of all interactions with us, even when it is only related to one particular topic. Toyota expects the same from us.”*  
—A Thai supplier

*“Toyota engineers are very detail oriented, and they constantly ask very specific questions. They want to understand the reasoning behind every product specification.”*  
—A European supplier

*“When Toyota has a request for you, they expect a response as soon as possible, even if it is over the weekend.”*  
—A German supplier

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**Source:** BCG interviews and analysis.
quality, and technology with Toyota? Is it willing to engage in a highly transparent preapproval quality audit, opening its books and revealing all relevant information?

**Responsiveness.** Does the supplier reply promptly to all requests and deliver exactly what it has promised? Can Toyota count on receiving a response—even over a weekend? How much time does the supplier need to respond?

The whole selection process is based on Toyota’s belief that long-term partnerships create more value than short-term ones. Working with familiar suppliers reduces transaction costs, and long-term suppliers can be integrated into longer-term product-planning cycles. This capability, in turn, leads to custom-made, robust solutions with optimized specifications.

**Supplier Collaboration: Toward Flawless Design**

Despite Toyota’s significant in-house competence in design, the company is committed to expanding its capabilities by continuously leveraging its suppliers’ expertise. During the NPD process, Toyota routinely solicits and exploits its suppliers’ experience by means of engineering design changes. Typically, a supplier receives high-level product specifications and is asked to apply its design and manufacturing expertise to recommend changes to those specifications and to develop detailed design drawings.

A cross-functional team from Toyota then evaluates this feedback for the impact the proposed changes would have on manufacturing costs, quality, global platform standardization, and complexity, among other factors. Often Toyota’s design engineers fly from Japan to a supplier’s site to attend a day-long workshop in which they and the supplier jointly address the proposed specification changes and decide whether to approve or reject them. Typically, if the proposed changes are deemed viable, they are implemented in the next vehicle project.

During the NPD process, Toyota maintains extraordinary control of design, all the suppliers in the supply base, and the NPD process itself.

**Control of Design.** Toyota controls all critical NPD design knowledge across three levels: components, systems, and vehicle integration. Thanks to this policy, Toyota is never too dependent on any one supplier for critical capabilities. Furthermore, Toyota typically controls system integration design for all modules, outsourcing only the design of components to its suppliers.

Despite Toyota’s insistence on control of design, the company respects suppliers as experts on the parts they produce. Toyota engages in a highly interactive process with its suppliers when it comes to how a part might be designed or produced at lower cost or with better quality or functionality. It encourages suppliers to think constantly about ways they can improve product design or the NPD process—and thus to contribute to Toyota’s relentless search for continuous improvement.

**Control of Suppliers.** Because Toyota has tight, detail-based relationships with multiple tiers of suppliers, it is able to closely manage its supply base. For component design, Toyota deals not only with its tier-one suppliers but also with tier-two and tier-three suppliers because they all provide direct input into the system integration process. Only when Toyota has thoroughly understood and mastered a process, technology, or solution will the company consider spinning it off or outsourcing it to a supplier. In many cases, Toyota itself specifies which lower-tier supplier should contribute which component and enters directly into the negotiations among the suppliers. Moreover, Toyota directly manages relationships with all suppliers involved, even the smallest ones. Although this process has a significant impact on Toyota’s resources, it allows the company to know its supply base intimately—and maintain tight control over it.

Contrary to commonly held industry belief, a supplier that Toyota refocuses on delivering a particular subcomponent rather than larger modular assemblies might actually experience increased sales to Toyota. In contrast, a supplier that attempts
to sell Toyota its completely assembled modules, rather than (or in addition to) the simpler component that Toyota has agreed to buy, might find its sales to Toyota curtailed—at least in the short term, until Toyota decides that the supplier is sufficiently experienced and knowledgeable to take on the responsibility of supplying the more complex module.

**Control of the NPD Process.** Toyota’s streamlined NPD process optimizes its interactions with suppliers, improving productivity for both. Toyota uses its systematic just-in-time design process to create a highly effective and intricately interleaved master schedule for each of its products.

Suppliers’ engineering requirements are based on Toyota’s specific needs at different points in the design process. For example, let’s say that a supplier is designing a headlamp unit that is to be incorporated into a side module designed by Toyota. The supplier would be given a deadline for when it would have to provide Toyota with the exterior dimensions of the headlamp. Toyota would not request a complete design of the headlamp because the headlamp’s interior specifications would likely change as the design process moved along. Toyota’s precision in anticipating which information will be needed by what date enables the company to use its own and its suppliers’ R&D capacity very effectively, reducing waste and contributing to a highly efficient design process. This is in striking contrast to the multiple iterations, delays, and wasted effort that typify many design processes.

Toyota’s NPD master schedule typically has many more project milestones than do those of other OEMs. The frequent milestone checkpoints reduce risk and increase Toyota’s ability to practice precise managerial control over its entire product-development timeline. Suppliers that work with Toyota describe its NPD master schedule as highly stringent and its execution of requirements and milestones as far more consistent than that of any other OEM. The result is an evening out of resource requirements during the NPD process—much as Toyota’s approach to the production flow in a plant evens out the costly peaks and valleys in the utilization of suppliers’ resources and performance.

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**Supplier Development: Toward World-Class Performance**

When Toyota has established an ongoing relationship with a supplier, it takes responsibility for helping that supplier develop its capabilities and grow its business. The success of the supplier is a reflection of Toyota’s success. Toyota expends considerable effort in helping its suppliers improve their performance. Toward this end, it employs a few key tools. First, it monitors its suppliers’ performance extensively, insisting that senior managers and key executives of each supplier organization be responsible for all quality and performance issues. Second, it performs thorough quality audits every six months. Third, it employs proprietary processes that facilitate the rapid resolution of problems; these processes ensure that whenever there is a quality defect, the supplier addresses the root cause to prevent quality problems from recurring. Fourth, Toyota makes available to its suppliers a robust knowledge-sharing network, allowing them to learn from one another in order to enhance their capabilities.

**Monitoring Suppliers’ Performance.** Toyota monitors its suppliers’ performance by means of two key monthly reports: the quality report and the *kanban*, or delivery, report. The quality report sets forth details such as defects per million parts, descriptions of defects, corrective actions, and responsiveness, along with the supplier’s overall quality ranking vis-à-vis its peers and an analysis of trends in suppliers’ performance. By showing the performance of all suppliers, this report allows each supplier to understand exactly where it stands relative to its competitors. The kanban report, in contrast, captures supply chain metrics such as “short ship,” delays in delivery, incorrect quantities, countermeasures, and containment. On-time delivery is expected and is tracked very closely. Although both instruments are well known at other OEMs, Toyota’s versions are more detailed and more stringently applied.

**Performing Extensive Quality Audits.** In addition to generating the two monthly reports, Toyota per-
forms an extensive quality audit every six months. This audit focuses on helping suppliers solve problems rather than on blaming them for deficiencies. Toyota expects all its suppliers to open their books and seek support in solving any problems they might have. During a quality audit, Toyota’s personnel spend less time looking at records and documentation than they do on the shop floor inspecting processes and products and talking to the supplier’s employees. The goal is to understand the supplier’s attitude toward quality and the way it addresses quality issues. Suppliers describe Toyota’s quality audits as particularly practical and effective. Toyota’s objective is to anticipate quality issues before they arise rather than to examine reports, which are typically reactive.

In Toyota’s view, responsibility for quality does not stop at the quality manager. In fact, suppliers’ senior managers are involved in the quality audits. It is not unusual for the CEO or a board member to attend monthly supplier meetings—and to be held personally responsible for discussing corrective actions and quality improvement initiatives with Toyota’s management team. Plant managers, similarly, are responsible for day-to-day quality performance, kanban performance, and the resolution of all quality issues. Toyota’s insistence on holding senior managers personally responsible for resolving all issues tends to make those managers very effective at promoting quality awareness across their entire organization.

Ensuring Rapid, Thorough Problem Resolution. Toyota implements a swift and very strict process to handle any problems it experiences with suppliers. The quest for understanding the root causes of each problem calls for the deep and immediate involvement of the supplier of the part involved. Within hours of a problem’s being identified, a quality assurance engineer from the supplier must be on site to inspect the problem and work jointly with Toyota’s manufacturing team to identify its root cause. Within three days, Toyota expects to receive a report describing the corrective actions the supplier plans to take. If necessary, the supplier must dedicate one or more staff members to focus on the problem until all new components are free of defects; these individuals must also monitor all corrective actions in detail. What is most important is that suppliers proactively develop systems that allow them to prevent similar problems from occurring in the future.

Promoting Knowledge-Sharing Networks. Toyota employs several forms of knowledge-sharing networks to enhance its suppliers’ capabilities. These networks include supplier associations, problem-solving groups, and voluntary learning teams. The type of network used varies with the maturity of the relationships involved.

- In new markets, supplier associations share general information such as Toyota’s policies and widely applicable best practices. Members meet in bimonthly general assemblies to share production plans, policies, and market trends. In addition, topic committees meet monthly to address specific areas such as cost, quality, and safety.

- Once the supplier base in a region is more established, Toyota forms focused problem-solving groups. These groups can request and obtain on-site assistance from Toyota’s experts in solving problems, such as those related to implementing the Toyota Production System. Such resources are typically available to all suppliers at no cost.

- In markets where Toyota has highly mature and integrated supply organizations, it promotes voluntary learning teams. These teams conduct on-site sharing of deep know-how within small groups, typically including 6 to 12 suppliers. Each team determines the theme it wants to address and then spends up to three months focusing on problems at members’ sites. Often these teams are assisted by senior consultants from Toyota’s supplier-support center, and Toyota transmits the lessons they learn to the rest of the supplier network.

One example typifies the way Toyota helps suppliers improve their performance. Toyota invited a tier-one supplier in Japan to conduct a performance improvement program. The supplier first came to an agreement with Toyota about which area of the manufacturing process it would focus on and then convinced its tier-two suppliers to sup-
port this initiative. A joint working team, consisting of a Toyota consultant and representatives from all the suppliers involved, was then formed. The team assessed the supplier’s current manufacturing processes and developed recommendations to revise the layout of the manufacturing line and invest in upgraded equipment to reduce defect rates and improve turnaround times. Toyota agreed to foot the bill for the upgraded machines, with the guarantee that the new machines would lead to lower prices for Toyota in the long term.

Suppliers are willing to seek Toyota’s assistance in improving their performance because of the significant value that Toyota provides. This value arises from three sources: Toyota’s deep knowledge of its products and all aspects of their design and manufacturing; the renowned and highly effective Toyota Production System, which addresses complex process-redesign challenges; and Toyota’s ability to transfer best practices across the world. Importantly, suppliers can take what they learn from Toyota and apply it to their work with other customers. All performance-improvement programs are supported by highly qualified Toyota engineers who work as consultants—often on fast-track management career paths. Significantly, any cost savings that suppliers achieve do not transfer directly into lower prices to Toyota. And Toyota typically shares cost savings with the supplier during the next annual cost review.

Year-end reviews complete the supplier development program. Suppliers that rank highest in year-end reviews are rewarded, whereas senior managers of suppliers at the bottom of the ranking are required to meet with Toyota’s senior management to explain why their performance is lagging.

Getting to Win-Win

Treating Suppliers Fairly

Suppliers report that the most important difference between Toyota and other OEMs is that Toyota is respectful, fair, and trustworthy in its dealings with them. Although it is very tough in negotiations and insists that suppliers share virtually all their data, Toyota also understands that if suppliers don’t make money, they can’t create value for Toyota.

However, Toyota never allows its suppliers to take their relationship with the company for granted. Whereas suppliers that perform well are rewarded with increased business, those that disappoint Toyota lose its business. In the latter case, Toyota is always clear about why it has severed its business ties with a supplier. For instance, a supplier might introduce a new design with improved technology, but at a significantly higher price, and fail to convince Toyota that the new technology justifies the price increase. Other actions that might prove fatal to renewal of supply contracts include bidding on a contract for a new model without putting sufficient effort into developing a competitive price, believing that supplying the previous model would guarantee a new contract, and assuming that Toyota needs two suppliers to hedge its risk. In fact, Toyota might award 100 percent of a contract to a single supplier if the potential second source fails to demonstrate the necessary effort, commitment, and professionalism. In each case, Toyota provides feedback that highlights the areas the supplier should work on to improve its cost, quality, and support of Toyota.

Toyota also ensures that its suppliers earn reasonable returns. Armed with a deep understanding of suppliers’ costs, Toyota defines a target price that discourages suppliers from providing unreasonable cost estimates. For example, when one supplier put in a bid for a particular component at a price that Toyota considered too high, Toyota rejected the bid. The supplier, determined to win Toyota’s business, responded by cutting the original price by more than 10 percent. The supplier’s managers were confident that this concession would secure the contract. But when Toyota asked what changes the supplier had made in its production process to reduce its costs by more than 10 percent, the supplier could not provide a satisfactory response. Toyota awarded the contract to a competitor.

Similarly, Toyota rejects suppliers that provide unreasonably low prices, which in Toyota’s view are not sustainable. Unreasonably low prices could ultimately affect quality, delivery schedules, or
overall support from those suppliers—factors that could eventually lead to higher costs for Toyota.

Notably, Toyota has repeatedly gone out of its way to support its suppliers through difficult times. During the financial crisis in Thailand in 1997, Toyota helped its suppliers by making large up-front payments rather than amortizing its payments over time, thus greatly reducing its suppliers' financial burdens. When one supplier was on the verge of bankruptcy and thinking of exiting its automotive-parts business, Toyota sent its top managers to meet with the supplier's leaders, convinced them to remain in the business, and supported them so that the company survived the crisis.

Toyota also gave its suppliers in Thailand automatic price increases when they needed cash desperately. Immediately after the crisis, suppliers were unable to meet their cash-flow requirements because of low utilization and reductions in volume. Toyota proactively increased its prices by 8 percent—and then increased them again by an additional 5 percent half a year later. Suppliers in Thailand told us that Toyota was the only OEM that supported its suppliers during the crisis. Some suppliers had requested similar assistance from other OEMs, but to no avail. Toyota's assistance enabled some suppliers to stay in business, and they will always remain grateful and loyal to Toyota. (See the sidebar below.)

Adopting Toyota’s Supplier-Relationship Principles

How can other OEMs emulate Toyota’s example? How can they create a base of suppliers that are committed to continuous performance improvement, unshakably loyal, integrated into an extended network, and generating stable financial results?

The answer, although not easy to implement, is relatively straightforward. To establish and maintain exceptionally effective supplier relations, a company must first adopt an overall corporate philosophy of treating all stakeholders fairly—and approach its suppliers in that spirit.

This philosophy of fair and respectful treatment needs to be evident in all the company’s interactions and efforts. With that foundation in place, other principles also shape the company’s relationships with suppliers. When the company selects suppliers, it should choose only companies that are committed to building long-term partnerships and that share a high-level work ethic. The NPD process should be based on leveraging suppliers’ expertise and sharing relevant technical knowledge at all levels: components, systems, and vehicle integration. Finally, both the company and its sup-

Suppliers Report That Toyota’s Fair Treatment of Them Leads to Trust and Mutual Benefit

- “Toyota is professional in all their interactions with suppliers. They have proved time and time again that they are trustworthy and that they will treat us fairly.”
- “Toyota helped us dramatically improve our production system. We started by making one component, and as we improved, Toyota rewarded us with orders for more components. Toyota is our best customer.”
- “We are willing to share our cost structure with Toyota because we trust that they will not use the information against us but instead help us get more competitive.”
- “Toyota is tough as hell in negotiations, and we have to share every detail of our data with them—but they are fair, and they know that if we don’t make money, we can’t innovate for them.”
- “Toyota accepts the fact that mistakes do happen. What we need to show is that we have learned from our mistakes and that we will not make the same mistake a second time. Toyota rewards you for that.”
pliers should understand that the close monitoring of suppliers’ performance arises not from mistrust but from a sincere desire to identify potential performance gaps and support one another in closing them.

These are the basic principles on which executives should base a serious review and redesign of their supplier relationships. The ideal approach for each company will not be a “copycat” version of Toyota’s unique system, but a tailor-made adaptation designed to reflect each company’s unique circumstances and existing relationships.

Moving from adversarial relationships to win-win relationships is not easy. Often companies must challenge and revise many established practices. But making that change can create extraordinary value, as illustrated by the widely admired example of Toyota.
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