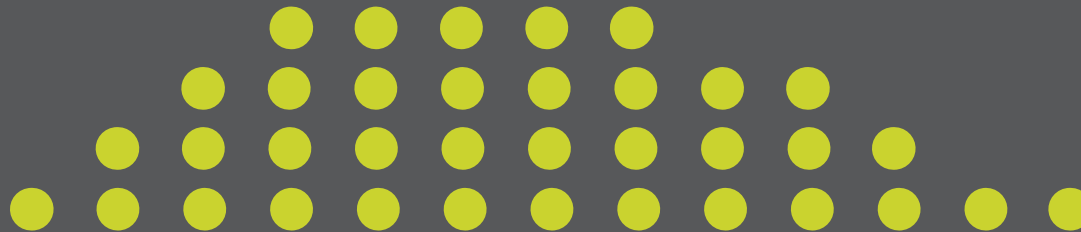


Volume

High-volume phase:

Typical order-winners of price requiring low-cost operations processes



Low-volume phase:

Typical order-winners of delivery speed and delivery reliability requiring flexible operations processes to cope with low volumes and wide product range

Price would typically be a qualifier



Process investment considerations

Exhibit 11.5

Product life cycles, order-winning criteria and process investment interact