

2011 CAR Management Briefing Seminars

World Class Manufacturing: Manufacturing Excellence

Monday morning, August 1, 8 a.m. – Noon

Chair:

Jay S. Baron, Ph.D. President, Chairman and CEO, Center for Automotive Research

Manufacturing excellence manifests itself in many ways. Twenty years ago, when *The Machine that Changed the World* was published, the principal focus was on lean manufacturing and the elimination of waste. Manufacturing excellence is an extension of lean and, like lean, requires a systemic perspective to achieve it. The critical role suppliers' play as an extension of the manufacturing enterprise is another important consideration. Experts and automotive manufacturing leaders will provide insight into the breadth and depth of key systems that allow organizations to measure and achieve manufacturing excellence. Examples provided will touch on the integration of product and process engineering; the economies-of-scale achieved through global vehicle platforms with common engineering and manufacturing standards; strategic use of automation and labor; and overall organizational effectiveness in launching complex products with six-sigma quality levels.

SESSION SPONSOR:



Manufacturing Excellence

Speakers:

Don Jackson, President, Manufacturing, Volkswagen Chattanooga Operations, LLC

Kenneth Knight, Executive Director, Global and North America Manufacturing Engineering, General Motors

Ron Harbour, Partner, Oliver Wyman

World Class Manufacturing Productivity

Speakers:

Massimo Risi, Head of World Class Manufacturing, Launch Executive, Chrysler Group LLC

Kevin Butt, General Manager/Chief Environmental/Safety Officer, Toyota Motor Engineering & Manufacturing North America, Inc.

Mary Foster, Vice President, Supply Chain Management, Inteva Products, LLC

Automotive News Supplier Awards

The top three winners of these awards will be announced. The biennial *Automotive News* OEM supplier innovation survey provides fascinating details on how the suppliers view the ability of their OEM customers to foster, encourage and actually implement the suppliers' innovations. The survey and award determination are conducted by J.D. Power and Associates for *Automotive News* and their partners at Deloitte.

2011 CAR Management Briefing Seminars

World Class Manufacturing: Manufacturing for Fuel Economy

Monday afternoon, August 1, 1 – 4 p.m.

Co-Chairs:

Jay S. Baron, Ph.D. President, Chairman and CEO, Center for Automotive Research

Greg Schroeder, Research Analyst, Manufacturing, Engineering and Technology Group, Center for Automotive Research

In the quest for higher fuel economy, every part on the car is under scrutiny for its effectiveness and mass. Many components are transitioning from mechanical to electric-based designs for this reason. The trend toward electrification will alter the design and manufacturing of the body structure and chassis. More new materials such as high strength steel, aluminum, reinforced plastics, and magnesium are being introduced every year. These materials require sub-system redesigns with new part forming and joining technologies. The long-term trend will reshape the traditional supply base—many of which can expect to become obsolete if they don't transition to these technologies. This session will provide an overview of fuel economy technologies: how they are being re-designed, and how suppliers are adjusting to these trends.

SESSION SPONSOR:



Manufacturing for Fuel Economy

Speakers:

Dr. Joerg Pohlman, Managing Director, SGL Automotive Carbon Fibers

Jeffrey Brennan, Chief Marketing Officer and Executive Vice President, Global Markets, Altair Engineering, Inc.

Lyle Otremba, Vice President, Commercial and Technical, Cooper-Standard Automotive

Alexander Freitag, Director, Diesels Systems Engineering for North American, Robert Bosch

Steve McKinley, Vice President, Global Product Assurance, Honeywell Turbo Technologies

2011 CAR Management Briefing Seminars

Connected Vehicles: Are They Already Here?

Monday afternoon, August 1, 1 – 4 p.m.

Chair:

Richard Wallace, Director, Transportation Systems Analysis, Center for Automotive Research

While the national effort to develop connected vehicles continues within the automotive industry and at USDOT, MDOT, and other transportation agencies, rapid advances in telecommunications technologies mean that many of us drive connected every day. Smart phones, 3G (and now 4G) networks, new in-vehicle interfaces, thousands of apps, social networking, and other recent technological developments have made continuous, ubiquitous connectivity both possible and relatively common for many individuals—perhaps too easy and too common for some of us! This pervasive mobile connectivity opens the door to a wide range of mobility apps and location-based services, as well as to the potential for driver distraction and loss of privacy.

So far, however, these technologies have not added much to vehicle safety; many would argue that only cooperative, active safety enabled by Dedicated Short Range Communication can tackle the hardcore safety challenge. Through an expert panel, this session will address all the latest developments and debates in the connected vehicle world and offer a glimpse into the future of vehicle communications.

Speakers:

Jeff DeBest, Group Vice President and General Manager, Global Electronics, Johnson Controls

Linda Marshall, President, OnStar

Mike Foley, Executive Director, Bluetooth Special Interest Group

Rick Warner, Chief Executive Officer, ParkingCarma

David Miller, Chief Security Officer, Covisint

Scott Nelson, Director of Business Development, ATX Group

Roger Safford, Region Engineer for the Grand Region, Michigan Department of Transportation

2011 CAR Management Briefing Seminars

Advanced Powertrain Forum

Tuesday morning, August 2, 8 a.m. – Noon

Chair:

Brett Smith, Co-Director, Manufacturing, Engineering & Technology Group, and Co-Director Conference Group, Center for Automotive Research

The Advanced Powertrain Forum will bring together experts from vehicle manufacturers, technology suppliers, and other stakeholders to address the challenges of automotive powertrain strategy in a highly uncertain market. The 2011 Advanced Powertrain Forum will include two panels. The first will address "big picture" powertrain issues: technology, policy and strategy. Automotive Powertrain leaders will discuss the role technology, government policy and consumer choice play in creating a powertrain strategy.

The second panel will bring together representatives from diverse industry stakeholders for a panel discussion on powertrain technology options, and how companies can balance near-, mid- and long-term investment opportunities in these uncertain times.

Speakers:

Ken Davis, President - Vehicle Group, Eaton Corporation

Charlie Klein, Director, Global Mass, Energy, and Aerodynamics, General Motors Company

Dan Kapp, Director, Powertrain Research & Advanced, Ford Motor Company

Douglas E. Patton, Senior Vice President, Engineering Division, DENSO International America, Inc.

Justin Ward, Advanced Powertrain Program Manager, Advanced Technology Vehicles, Fuel Cell and Hybrid Vehicle Group, Toyota Motor Engineering & Manufacturing N.A. Inc.

Mike Donoughe, Chief Operating Officer, Bright Automotive, Inc.

2011 CAR Management Briefing Seminars

South America: Prospects for North American Suppliers

Tuesday morning, August 2, 8 a.m. – Noon

Chair:

Bernard Swiecki, Director, Market Analysis, Center for Automotive Research

South America presents North American suppliers with an outstanding opportunity to access a rapidly growing, stable, and profitable market close to home. Vehicle production and sales in Brazil and Argentina are setting records, and forecasters expect this trend to continue in the future. Accessing this market and taking full advantage of the opportunities it presents, however, will require an informed approach in order to navigate its complexities.

A North American supplier considering entry into the South American market must navigate--and take advantage of--currency fluctuations, regional free trade agreements, and other factors unique to the region. This session will reflect on how automotive supplier executives can maximize their opportunities and be successful as they consider entering the South American market. Speakers will include supplier executives whose firms operate successfully in South America, as well as analysts with unique insight into the market.

Speakers:

Jon Sederstrom, Director, Brazil, J.D. Power and Associates

Chris Powers, Specialist II, Automotive Practice, Oliver Wyman

Besaliel Botelho, Executive Vice President, Robert Bosch Latin America

Wilson Bricio, Chief Executive Officer, ZF South America

Kurk Wilks, Director, Sales and Engineering, Mann + Hummel

2011 CAR Management Briefing Seminars

Money Matters

Tuesday afternoon, August 2, 1 – 4 p.m.

Chair:

Bernard Swiecki, Director, Market Analysis, Center for Automotive Research

Although automotive production, sales, and profits have recovered from the recent economic crisis, automotive suppliers continue to face a challenging business environment that will exert continuing pressure on their financial health. Suppliers' revenues are under siege on all sides: pressure to reduce prices is increasing while banks and investment firms remain wary of the automotive sector. Suppliers are called on to provide more value to the automotive value chain—while running leaner, more efficient operations — than ever before.

In order for suppliers to respond to these demands, access to capital, as well as optimized money management is a must. Despite the recent economic recovery, money—for acquisitions, restructuring, or growth—remains challenging to obtain and manage. This session will strive to support supplier executives as they contend with this challenging industry environment. Speakers will include purchasing executives from automakers, automotive industry analysts from investment institutions, and supplier executives who have guided their firms through these challenges. Together, these speakers will paint a complete picture of the business environment currently faced by automotive suppliers and the paths that can lead them to prosperity.

SESSION SPONSOR:



Speakers:

Mark Morante, Senior Vice President, Policy, Program Management and Governmental Affairs, Michigan Economic Development Corporation

Michael Robinet, Director, Global Production Vehicle Forecasts, IHS Automotive

Dan Knott, Senior Vice President, Purchasing and Supplier Quality, Chrysler Group LLC

Birgit Behrendt, Executive Director, Global Programs and the Americas Purchasing, Ford Motor Company

Rebecca Vest, Vice President, Purchasing, Renault-Nissan Purchasing Organization

2011 CAR Management Briefing Seminars

Policy Matters -- How much faith can we (should we) put in technology?

Tuesday afternoon, August 2, 1 – 4 p.m.

Chair:

Kim Hill, Group Director, Sustainability & Economic Development Strategies and Associate Director of Research, Center for Automotive Research

In the current debate about emissions, fuel economy and safety targets, two positions have been staked out. The first is represented by those seeking to protect the public health and climate—environmental groups and other NGOs—and proposes that by setting ambitious goals, technology will respond and the goals will be achieved. The other is represented by those designing and producing the technology and responding to consumer demand—manufacturers and suppliers—and wants more reasonable goals that can be affordably achieved by improving today’s technologies. On the outside are the many commentators who tend to fan the flames, without a grounded appreciation for either point of view. Indeed, the most common refrain from all camps is: “you don’t understand the possibilities / limitations.”

This panel will seek to explore the pros and cons of current approaches to setting vehicle standards and how future goals and mandates should be determined.

Speakers:

Sean McAlinden, Ph.D., Executive Vice President, Research and Chief Economist, Center for Automotive Research

John DeCicco, Senior Lecturer, School of Natural Resources & Environment, University of Michigan

Mike Stanton, President and CEO, Global Automakers

Dan Becker, Director of the Safe Climate Campaign, Center for Auto Safety

Brad Markell, International Representative, Research Department, UAW

2011 CAR Management Briefing Seminars

Automotive: Prosperity Amid Uncertainty

Wednesday morning, August 3, 8:00 a.m. – 12:30 p.m.

Chair:

Jay S. Baron, Ph.D., President, Chairman and CEO, Center for Automotive Research

Thursday morning, August 4, 8:00 a.m. – 12:30 p.m.

Chair:

David Cole, Ph.D., Emeritus Chairman, Center for Automotive Research

The automotive industry's future appears bright after several years of darkness. While 2011 sales volumes remain at depressed levels, the industry has adapted by dramatically lowering its breakeven volume. Auto manufacturers have restructured their debt, realigned their supply chains and retooled their relationships with labor. This massive restructuring has set the stage for a period of potential profitability, but formidable challenges remain. As the industry takes aim at 2012 and beyond, uncertainties such as the pace of economic growth, volatile energy and material prices, global market vagaries, government policies, and technological change (e.g. advanced powertrains, advanced telematic systems, and advanced materials) are abundant. The challenge is will stakeholders be able to mitigate the complexity associated with so much uncertainty. It is in this context automotive industry leaders will address their expectations for a future that seems to be arriving—and changing—at an ever-increasing speed.

The Automotive sessions will include representatives from vehicle manufacturers and suppliers highlighting the strategies necessary to thrive in the new automotive world. The Wednesday morning session will also include a special supplier strategy panel (described below).

Wednesday Speakers:

Sergio Marchionne, Chief Executive Officer, Chrysler Group LLC and Chief Executive Officer of Fiat S.p.A.

Bob King, President, UAW

Réal "Ray" Tanguay, Senior Managing Officer, Toyota Motor Corporation (TMC); Senior Vice President, Toyota Motor North America (TMA) and Chairman, Toyota Motor Manufacturing Canada Inc. (TMMC)

Thursday Speakers:

Jonathan Browning, President and CEO, Volkswagen Group of America, Inc.

Paul Skalny, Director, National Automotive Center, U.S. Army RDECOM TARDEC

Mark Reuss, GM Vice President and President North America, General Motors Company

James Kamsickas, Co-Chief Executive Officer and President, IAC Group North America and Asia

Kirk Steudle, Director, Michigan Department of Transportation

2011 CAR Management Briefing Seminars

Rebuilding the New North American Supplier Sector

Wednesday a.m.

Chair:

Sean McAlinden, Ph.D., Executive Vice President, Research and Chief Economist, Center for Automotive Research

The North American supplier sector virtually hibernated to survive the terrible sales years of 2008 and 2009. Capacity and staffing were severely reduced, and a number of firms endured painful financial restructurings. The results have produced the leanest automotive supplier sector perhaps in history with an ability to generate earnings at very low levels of sales. Production and sales, however, are expected to rise in 2011 and the years following. The strains of such growth are beginning to appear in the form of inadequate capacity, short-falls in technical staff and commodity inflation. The pace of technological change has also produced a raft of non-automotive technology suppliers that are used to different business models and manufacturer supplier relations than those traditional to the auto industry. These challenges may produce solutions that dramatically change the structure of the supplier industry in North America. This panel will contain a representative group of traditional auto supplier CEOs and new non-automotive technology executives will discuss the ramp-up to a new North American supplier sector.

Speakers

Don Walker, Chief Executive Officer, Magna

William Kozyra, Chief Executive Officer, TI Automotive, and Chairman, Original Equipment Suppliers Association

Hans-Werner Kaas, Director, McKinsey & Company, Detroit

2011 CAR Management Briefing Seminars

Bargaining for a Competitive Future:

The 2011 Negotiation between the UAW and the Detroit 3

Wednesday afternoon, August 3, 1:30 – 4:30 p.m.

Chair:

Kristin Dziczek, Director, Labor and Industry Group, and Director, Program for Automotive Labor and Education, Center for Automotive Research and **Art Schwartz**, Ph.D., President, Labor & Economics Associates and former General Director, Labor Relations, General Motors

The Detroit 3 and the UAW will negotiate a new 2011 labor agreement this summer. This agreement has the potential to reinforce the competitive position the Detroit companies now have on labor costs in the North American industry and extend it into the future. This position came about under the trying circumstances of the financial rescue of GM and Chrysler and the restructuring of Ford. The UAW can prove through this negotiation that it is committed to the competitive success of its major employers in the long run; it is also worthy of consideration by workers in international companies outside of the traditional industry. The development of a new formula for compensating workers that is more closely tied to the performance of the company—both financially and in terms of quality and productivity—are key to this negotiation. An efficient pattern along these lines could spread throughout the industry.

This panel will attempt to identify the key bargaining issues and barriers that must be solved to make the 2011 agreement a win-win deal for the whole industry and the economy. Panel participants will include important negotiators from past bargaining years from both the companies and the unions.

Speakers:

Joel Cutcher-Gershenfeld, Dean and Professor, School of Labor & Employment Relation, University of Illinois at Urbana-Champaign

Bob Clark, President, RWC Consulting L.L.C. and former Director, Labor Affairs Planning, Ford Motor Company

Jim Stanford, Economist, Canadian Auto Workers

Tom Walsh, Columnist, Detroit Free Press

2011 CAR Management Briefing Seminars

Designing for Technology

Wednesday afternoon, August 3, 1:30 – 4:30 p.m.

Co-Chairs:

Brett Smith, Co-Director, Manufacturing, Engineering & Technology Group, and Co-Director Conference Group, Center for Automotive Research

Richard Wallace, Director, Transportation Systems Analysis, Center for Automotive Research

Technology, demographics and other factors are changing the automobile. Gen Y, Gen X'ers, millennial and the Internet generation view the automobile differently than the Baby Boomers. Yet the need—and desire—for personal mobility remains strong. Advanced powertrains, connected vehicle and safety technologies, and alternative materials will play a role in how vehicle manufacturers respond to the changing demands of the consumer.

Clearly, there is an ever increasing blending of consumer electronics, vehicle powertrain technologies and the vehicle itself. Companies that create products and business models to effectively meet at that convergence will be ideally positioned for success.

The Designing for Technology Symposium will bring together thought-leaders from technology companies, vehicle manufacturers and other stakeholders to explore how technology and consumer trends will influence the design, sales and use of vehicles in the coming decade.

This interactive program will include presentation formats such as technology demonstrations, vehicle design walk-around, and other interactive activities to highlight the pathways to create high demand products.

Speakers:

Imre Molnar, Dean of the College, College for Creative Studies

James D. Farley, Jr., Group Vice President, Global Marketing, Sales and Service, Ford Motor Company

Paul Williamsen, National Manager, Lexus College at Toyota Motor Sales, U.S.A., Inc.

Chris Weber, President, Nokia North America

Sean Sullivan, Director, Global Marketing Solutions, Facebook