Understanding the New Role of Government in the U.S. Auto Industry

“Focus on the Future”
UM Automotive Research Conferences

WELCOME!

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Automotive Analysis Division
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Funding

- Affiliate Program
- Research
- Conferences
Automotive Analysis Division
University of Michigan
Transportation Research Institute

**Affiliates**

**IT Organizations**
Oracle Corporation
IBM
HP
Siemens-PLM
QAD

**OEMs**
General Motors
Toyota
Nissan Tech Center

**Government**
NREL / EPA
NSF
Motor Carrier

**Consultants**
Deloitte
About Consulting

**Suppliers**
Chevron
Visteon
Denso
Dana
Delphi
Peterson Spring
Continental
TRW
Valeo
UMTRI-AAD Affiliate Program

For 2010, we have re-designed our Affiliate program by focusing the funding received from our Affiliates on 3 main annual research projects that look at the current and future direction of the global automotive industry:

1. Automotive powertrains and emissions focused on technology and regulatory/policy forecasting through our Powertrain Strategies for the 21st Century study

2. The role of information technology in the automotive industry through our Automotive CIO study

3. The globalization of the automotive industry based on a focused, country level analysis of a developing or developed market.
UMTRI-AAD Affiliate Program

• Affiliates will have access to all three reports, but they will be asked to choose which project their funding will support.

• Supporting companies will form the advisory board for each study and meet with UMTRI researchers to determine topics to examine within each study.

• Results will be presented at our annual conferences on powertrains, information technology, and globalization.

• We are also open to focusing on other areas of research based on client requests.
Upcoming UMTRI-AAD Conferences

• April 22, 2010 (Thursday): Inside China: Understanding China’s Current and Future Automotive Industry. This 3rd annual conference will provide in depth analysis of China’s automotive industry and its future direction.

• July 14, 2010 (Wednesday): Powertrain Strategies for the 21st Century. This 2nd annual conference will focus on current powertrain topics and their effects on the future of the industry.

• September 15, 2010 (Wednesday): The Business of IT: Transforming the Organization and the Vehicle

• November 10, 2010 (Wednesday): Topic to be Determined
Panelists

- **Walter McManus**, Research Scientist, University of Michigan Transportation Research Institute
- **Patrick Davis**, Program Manager, Vehicle Technologies, Department of Energy
- **Michael Vitek**, Vice-President, Mercedes-Benz Technology North America
- **John Dingell**, Congressman, U.S. House of Representatives
Panelists

- **Christopher Grundler**, Deputy Director of EPA’s Office of Transportation and Air Quality and the Chief Executive of the National Vehicle and Fuel Emissions Laboratory

- **Bob King**, Vice-President, United Auto Workers

- **Itay Michaeli**, Equity/Debt Research, Citi Investment Research
Morning Schedule

• 9am
  – Bruce Belzowskki
  – Walter McManus
  – Patrick Davis

• 10:25am Break

• 10:40am
  – Michael Vitek
  – John Dingell

• 11:30am Q&A

• Noon-1:30pm Lunch
Afternoon Schedule

• 1:30pm
  – Christopher Grundler
  – Bob King

• 2:35pm  Break

• 2:45pm
  – Itay Michaeli

• 3:20pm  Q&A

• 4:15pm  Adjourn
Conference Questions

• How big a role will the U.S. government play over the next 10 years in the U.S. auto industry compared to the past?
• What challenges, if any, will the industry face if the government plays a more active role?
• How, if at all, are the different agencies within the government related to the auto industry changing how they relate to the industry?
Conference Questions

• Is the U.S. government developing an industrial policy for the auto industry through its focus on alternative energy?
• What can the government do to encourage the transition to more fuel efficient vehicles?
• How will the focus on CO2 emissions affect fleet fuel economy?
• How will the CA emission initiatives affect the EPA initiatives?
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