



STATE OF
AUTOMOBILITY



STATE OF AUTOMOBILITY



Sandy K. Baruah

Chief Executive Officer, Detroit Regional Chamber



Jan. 2015

Established to champion statewide policy for industry

Jan. 2017

Launched automotive and mobility news site to share Michigan stories globally

Dec. 2019

Increased focus on talent, awareness, policy, and mobility

Today

93
investors

Jan. 2007



Founded to represent industry

Jan. 2012



Adopted as a key economic development initiative

March 2013

MICHIGAN IS AUTO MOBILITY

Published to market the industry's assets

Adopted statewide for business attraction, translated in multiple languages

May 2015

Michigan Mobility Initiative

Launched to ensure Michigan leads the nation in next-generation mobility

Oct. 2017

Launched Landing Zone for mobility and technology startups



March 2020

Established MICHauto Board of Directors

Jan. 2021

Launched CEO Coalition for Change in partnership with CADIA



4

original investors

34

investors



Thank
You

PRESENTING



MICHIGAN OFFICE OF
FUTURE MOBILITY
& ELECTRIFICATION

SUPPORTING



STARTUP

Bank of America

MAHLE

Dykema

Nexteer Automotive

Ford Motor Company

Warner Norcross + Judd

IN PARTNERSHIP WITH





MICHauto



@MICH_auto



@MICHauto

#SOA21

#MIMobilityReport

CEO COALITION FOR CHANGE: MODERATED DISCUSSION



GLENN STEVENS JR.
Executive Director, MICHauto;
Vice President, Automotive and
Mobility Initiatives,
Detroit Regional Chamber



CHERYL THOMPSON
Chief Executive Officer and Founder,
CADIA



MODERATOR
LISA LUNSFORD
Chief Executive Officer
and Founder, GS3; Chair,
MICHauto Board of Directors

AUTOMOTIVE TECH TALKS



ALI CARAVELLA
Partner, WRK/360



JOHN MCELROY
Host, Autoline



MICHAEL ROBINET
Executive Director,
IHS Markit Advisory



MARC SIRY
Vice President,
Strategic Development,
Comcast Business





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Glenn Stevens Jr.

Executive Director, MICHauto; Vice President, Automotive and Mobility Initiatives, Detroit Regional Chamber

2020 Summit: Feb. 25



Evolution of EVs



Diversity and Inclusion Panel



Gov. Whitmer establishes
Office of Future Mobility
and Electrification

Today

CEO COALITION FOR CHANGE



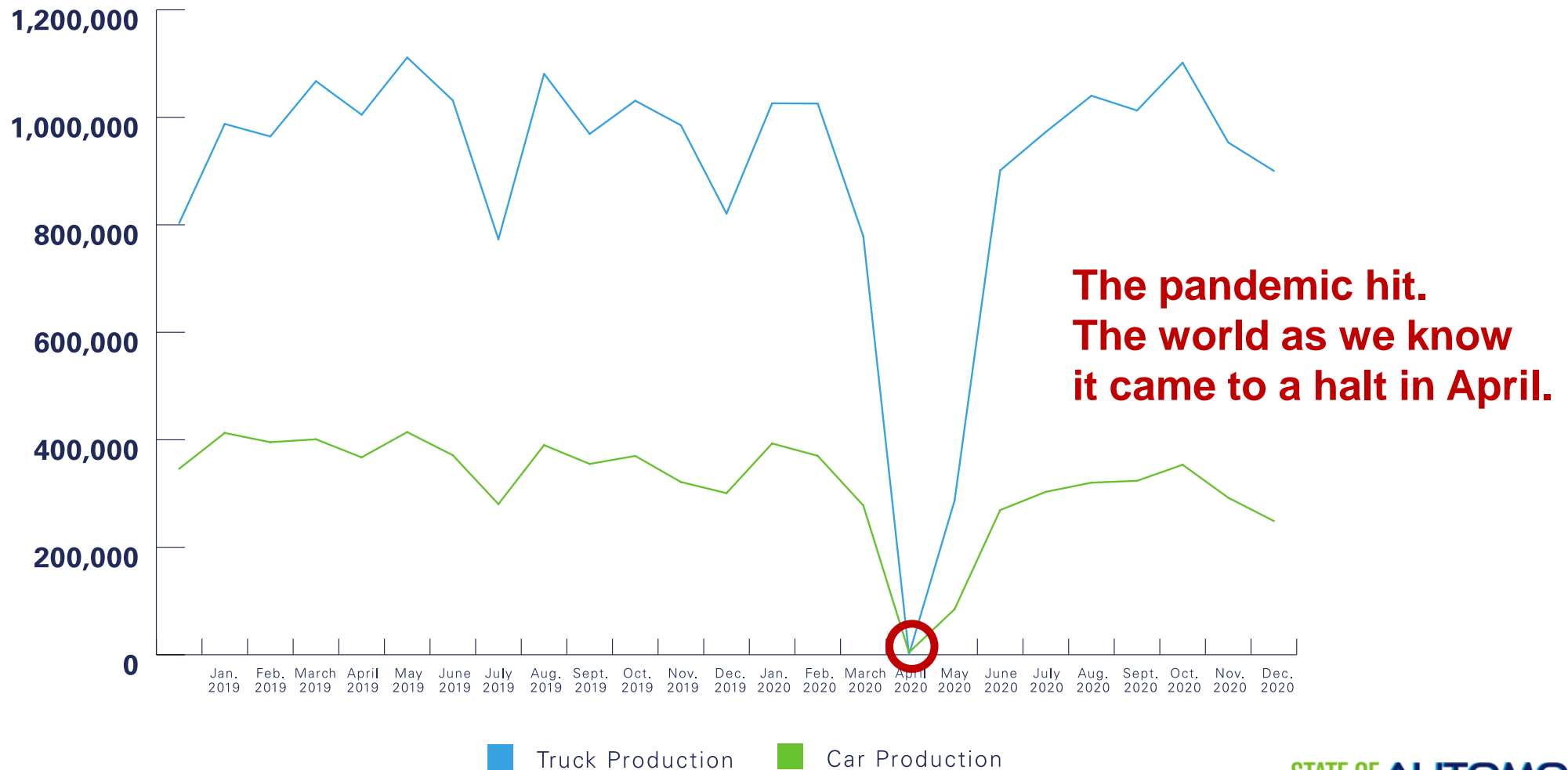
Developing a strategic partnership and call to action in the automotive industry for a renewed focus on diversity, equity, and inclusion.



**MICHIGAN ECONOMIC
DEVELOPMENT CORPORATION**

**MICHIGAN OFFICE OF
FUTURE MOBILITY
& ELECTRIFICATION**

NORTH AMERICAN CAR AND LIGHT-TRUCK PRODUCTION



Michigan Automotive Synergy Task Force



- ✓ PPE Mobilization
- ✓ Promote Diverse Workforce
- ✓ Reopen Manufacturing
- ✓ Tariff Response
- ✓ Immigration Reform

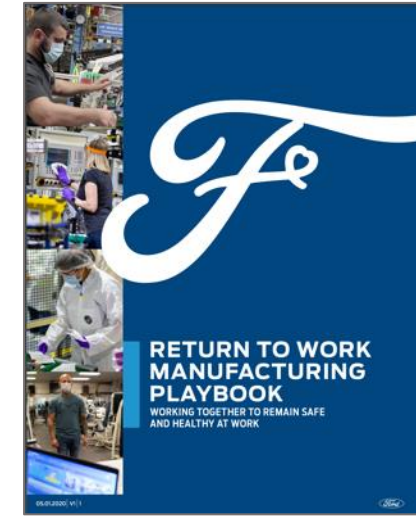




Supported pivot to production of PPE through connecting manufacturers with demand, such as Nexteer for face shields.



Connected the City of Detroit to key resources at Honda to bring contactless vehicles to Detroit for transporting COVID-19 patients.



Safe Work Playbooks

Interactive guide on COVID-19 pandemic preparedness and response found on detroitchamber.com/covid19.



MICH auto
One Woodward Avenue • Suite 1900 • Detroit, MI 48226

May 5, 2020

The Honorable Gretchen Whitmer
Governor, State of Michigan
P.O. Box 30013
Lansing, MI 48909

Dear Governor Whitmer:

Thank you for the leadership your Administration has provided during this unparalleled period in the history of our state, and we continue to address and respond to the COVID-19 crisis with the same care and shares in your commitment to the health and safety of Michigan.

MICHauto joins the Original Equipment Manufacturers Association (OEM) in their letter dated April 30, 2020, as we cautiously emerges from the "Stay Home, Stay Safe" period. The sequencing of the commencement of automotive production to a safe and efficient restoration of final assembly.

While all elements of the automotive supply chain must first be in place, OEM counterparts, many firms that produce the necessary production, preparation and mobilize our corporate environment and positioned to support the automotive industry.

As Michigan's only automotive industry organization, our priorities of keeping employees safe, working environments, and employee health are paramount. We look forward to working with you to ensure the automotive industry is prepared to restart.

Sincerely,

Glenn Stevens
Executive Director, MICHauto

July 16, 2020

The Honorable Gretchen Whitmer
Governor, State of Michigan
P.O. Box 30013
Lansing, MI 48909

Dear Governor Whitmer:

On behalf of Michigan's automotive industry, thank you for your continued leadership as our state and nation move forward in perseverance of the COVID-19 pandemic. We share your priorities of keeping Michigan's residents safe while balancing the need to maintain a responsible level of social and economic activity.

The automotive industry is also concerned about the recent rise in confirmed cases. MICHauto is actively encouraging our membership to take the "Keep Businesses Open - #MaskUpMichigan" pledge in order to promote public health and ensure our economy can continue to stay open for business.

As you evaluate your options, I encourage you to consider the record of the automotive industry in keeping our associates and workplaces safe. Anecdotal information seems to suggest that the greater risk of virus spread comes from social gatherings where people let their guard down, discarding social distancing and mask guidelines, as opposed to structured manufacturing environments. I am pleased to report that no major COVID incidents have been tied to any Michigan automotive manufacturing facility. The industry also recognizes that more can be done to encourage proper adherence to health protocols when our employees are "off the clock."

I know you fully realize the importance of the automotive supply chain to Michigan's economy, and I hope you recognize how this industry has taken these matters seriously and the extensive and thorough precautions that have been taken at these manufacturing sites. The safety measures implemented by our automotive plants have proven successful and have served as best practice models for other industries across the state.

You face an unprecedented challenge as Michigan's leader during this time. While no one knows how long this will last, Michigan's ultimate recovery will likely rely on the strength of its largest industry. On behalf of Michigan's automotive leaders, I urge you to resist the closure of our manufacturing facilities and allow these demonstrated safety protocols to continue working to keep our businesses open.

USA TODAY May 6, 2020
Letter to Whitmer pleads for auto suppliers to restart sooner than Detroit Three

FOX 2 DETROIT May 7, 2020
Auto suppliers go back to work as Michigan manufacturing begin restart amid COVID-19

Detroit Free Press PART OF THE USA TODAY NETWORK May 6, 2020
Letter to Whitmer pleads for auto suppliers to restart sooner than Detroit Three

The Detroit News May 7, 2020
Whitmer allowing Michigan factories to restart work next week

Detroit Free Press PART OF THE USA TODAY NETWORK July 18, 2020
Gov. Whitmer issues warning to auto industry: How it's reacting

WWJ-950 NEWSRADIO July 18, 2020
Gov. Whitmer Urged To Keep Auto Plants Running; High School Sports Will Be Back




Work Smart, Play Smart to KEEP MANUFACTURING OPEN

Personal Safety Protocols

				
S	M	A	R	T
Socialize in small groups.	Mask up in public to keep manufacturing moving.	Always opt for outdoor dining and activities.	Remember to be smarter than the virus by being vigilant of potential symptoms.	Take this seriously, and it will be temporary.



CREATE



COMMUNICATE

COVID-19
TOWN HALL SERIES



CENTER FOR
AUTOMOTIVE
RESEARCH



Webinar Series

MPC20 CONVERSATIONS:
Respond and Rebuild 

CONTINUE



CAPITOL
Conversations



MICHIGAN ECONOMIC
DEVELOPMENT CORPORATION

MICHIGAN OFFICE OF
FUTURE MOBILITY
& ELECTRIFICATION

Mobility
Meetup

CEO Convenings



STATE OF AUTOMOBILITY

The logo for the Michigan Auto Caucus, featuring a dark blue silhouette of the state of Michigan. The word "MICHIGAN" is written in dark blue, uppercase, sans-serif font across the top of the silhouette. The word "AUTO" is written in large, green, uppercase, sans-serif font across the middle, with a green car wheel icon integrated into the letter "O". The word "CAUCUS" is written in dark blue, uppercase, sans-serif font across the bottom of the silhouette.

Rep. Jim Lilly (R-Park Twp),
Co-Chair, Michigan Legislative
Automotive Caucus



Sen. Mallory McMorrow (D-Royal Oak),
Co-Chair, Michigan Legislative
Automotive Caucus



Sen. Wayne Schmidt (R-Traverse City),
Co-Chair, Michigan Legislative
Automotive Caucus



Rep. Joe Tate (D-Detroit),
Co-Chair, Michigan Legislative
Automotive Caucus

Policy Agenda



- Drive legislation for:
 - ✓ EV infrastructure
 - ✓ distracted driving,
 - ✓ R&D tax credits
- Talent
- Trade
- Business Climate

The Year Ahead in Talent

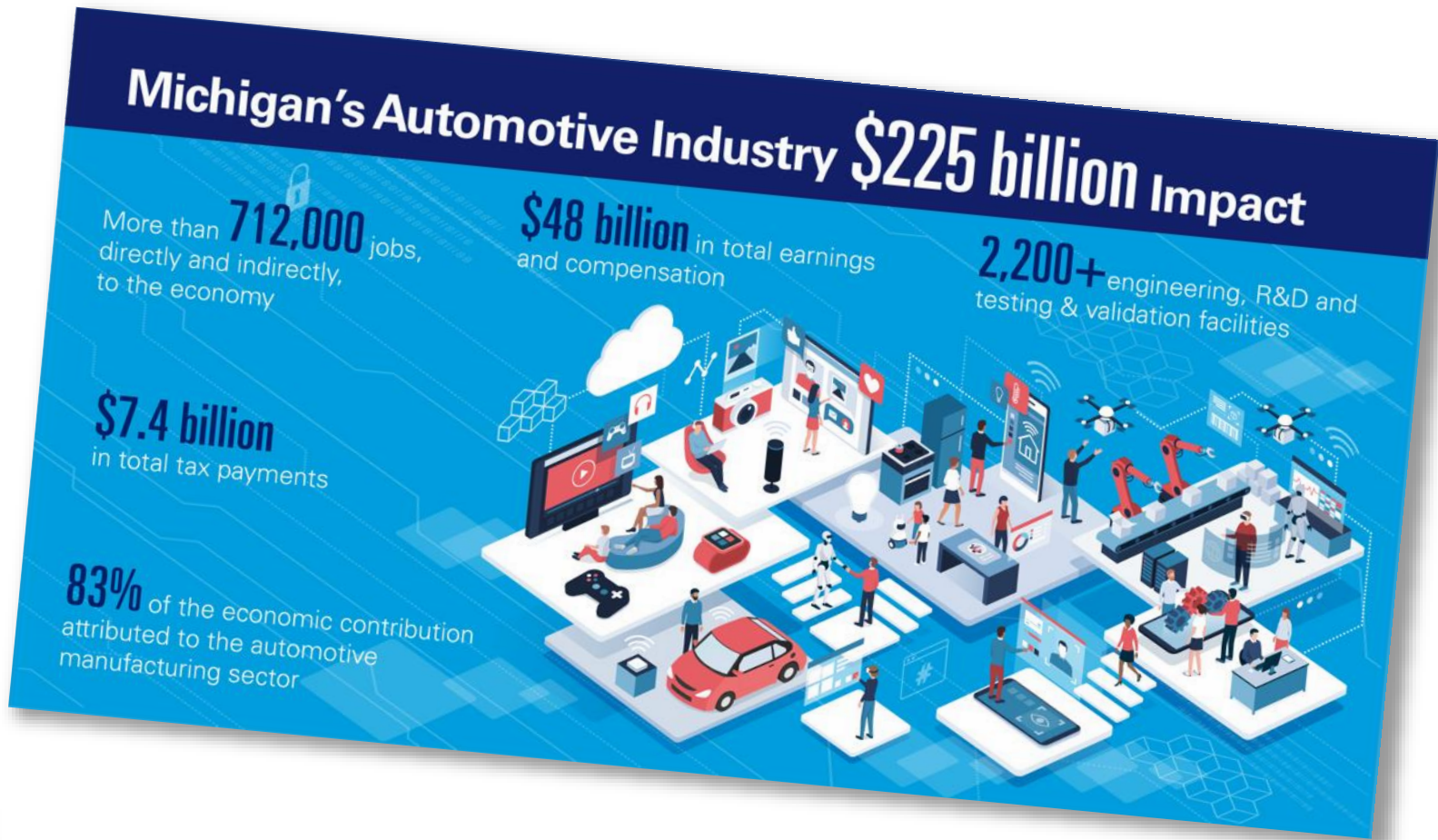


**HIGH-TECH
TALENT
FOCUS**

**CEO COALITION
FOR CHANGE**



In 2019...



Making News Today



Michigan's Mobility* Industry **\$304 billion** Impact

More than **1.1 million** jobs, directly and indirectly, to the economy

\$71 billion in total earnings and compensation

\$65,000 average annual compensation

\$9 billion in total tax payments

23% of Michigan's gross state product (GSP)



*Michigan's mobility industry, beyond the automotive industry alone, includes the production and distribution of goods and delivery of services that support all movement of people and products.



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John McElroy

Host, Autoline



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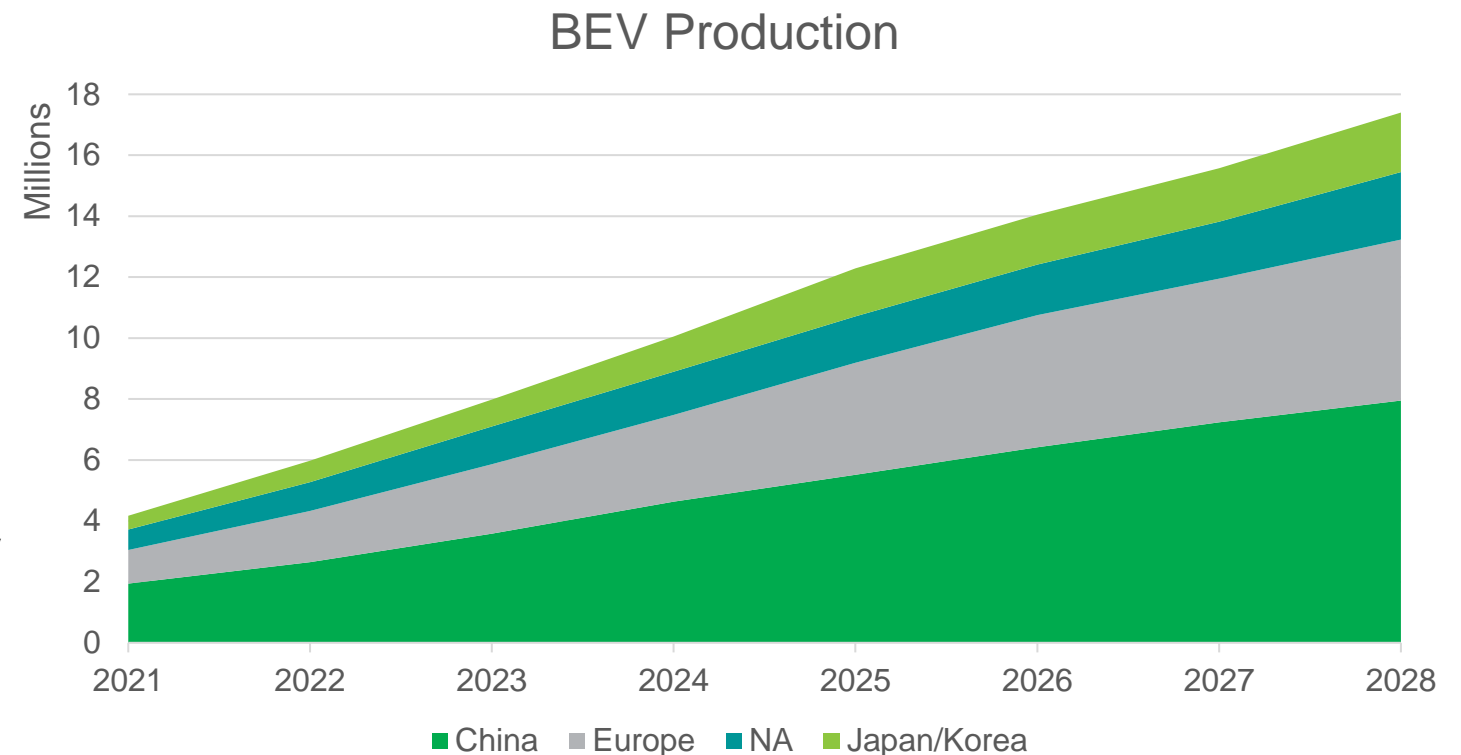
Michael Robinet

Executive Director, IHS Markit Advisory

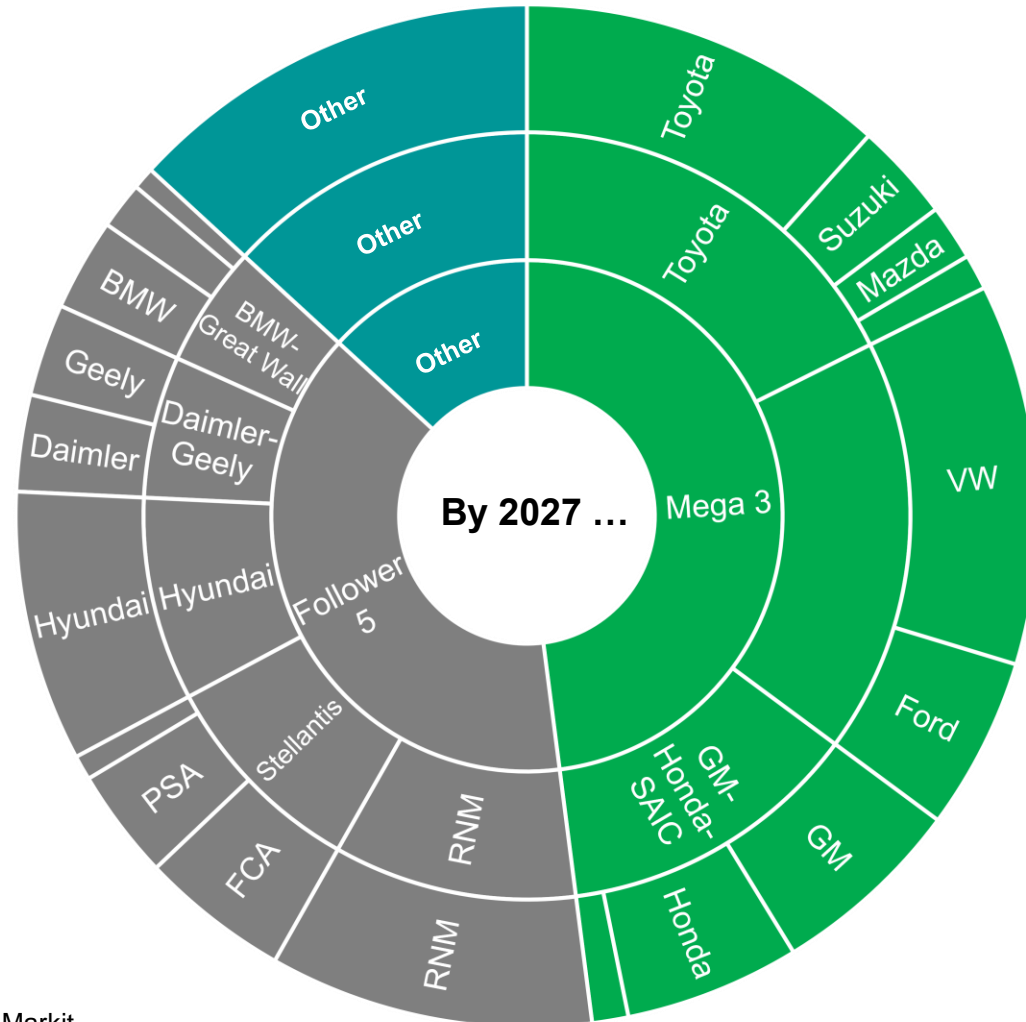
Regional and OEM dynamics of BEV production growth through 2027

Global BEV production reached 1.97 million units in 2019 but is forecast to reach 14.47 million units in 2027, or roughly 15% of total light-vehicle production.

- As is true of LV production, the highest-volume producers will deliver more than 75% of total BEV production.
- China, Europe, and North America will host more than 85% of BEV production globally; China more than 40% alone. Most Chinese production is expected to remain in China; export opportunities are greater for other regions.
- **Traditional legacy OEMs are increasing production in their home regions first**
 - With global manufacturing footprints in place, they can rapidly expand BEV production
- **EV segments are changing**
 - Increasing BEV segment coverage is critical to becoming a natural part of the landscape, not a separate market
 - Not unlike hybrid evolution; at one point, they were weird-looking, boring, penalty boxes. Today, hybrid is simply a powertrain option, not a “market.”



OEMs Consolidate – The New Economies of Scale



- Impact of dual-stream industry – ICE vs. BEV
- Up to six mega-OEMs could account for 75% of total global production volumes
 - Toyota and affiliates
 - VW-Ford
 - GM-Honda-SAIC
 - R-N-M
 - Stellantis (FCA/PSA)
- Consolidation drivers include:
 - Speed to market
 - Geographic expansion/coverage
 - Economies of scale/ Procurement
 - Regulatory compliance
 - Access to technology

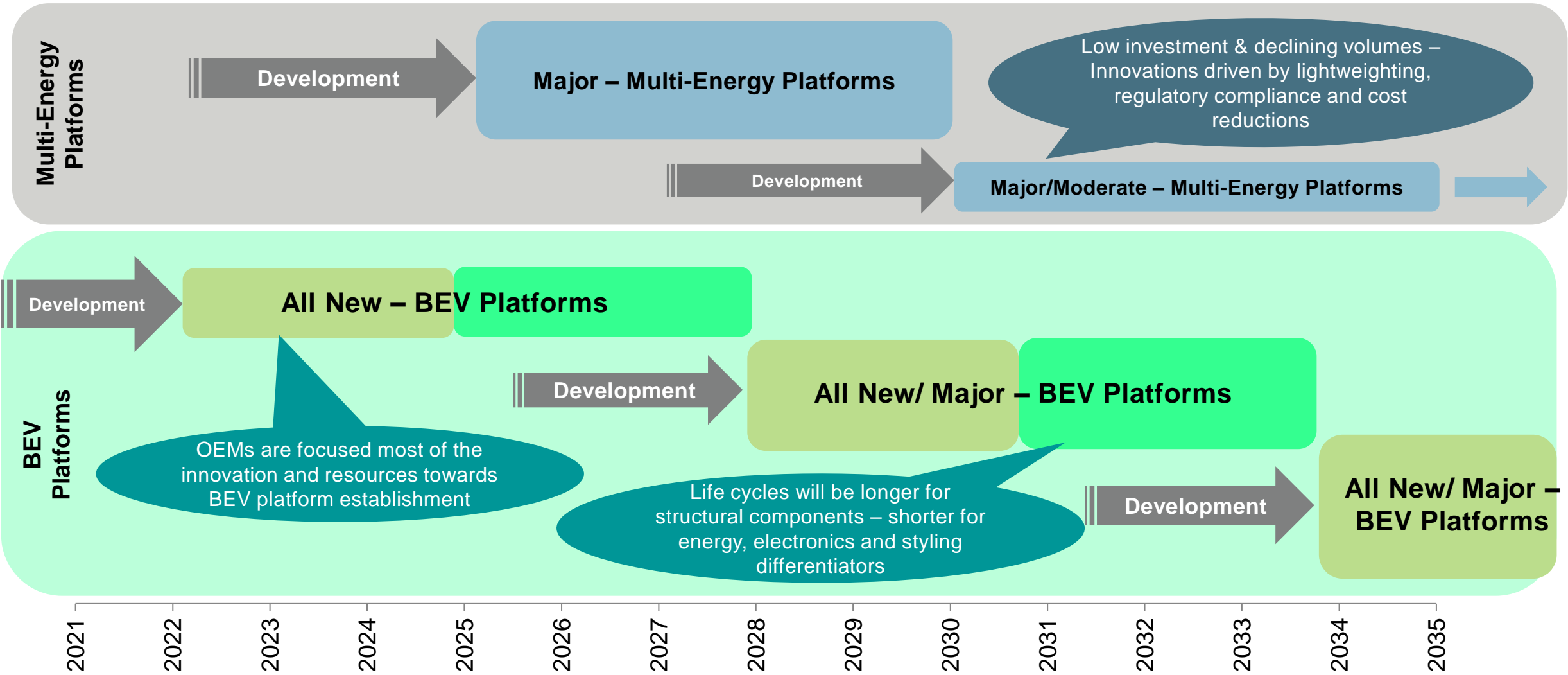
Source: IHS Markit

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Aspirational Goal: BEV-Only After 2035?

Two More ICE Development Cycles - Finite, Restricted and Riskier

Suppliers need to work backwards to efficiently invest in Multi-Energy Platforms. Only two cycles to amortize major investments, new facilities, ICE innovations.





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Ali Caravella

Partner, WRK/360



2021 State of Automobility – Automotive Tech Talk

Evolution of How We Will Work in the Future

WHERE ARE WE?

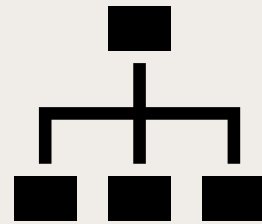


THE NEXT PHASE OF WORK

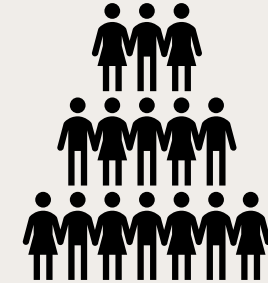
3 TIERS OF FOCUS



1. Organizations

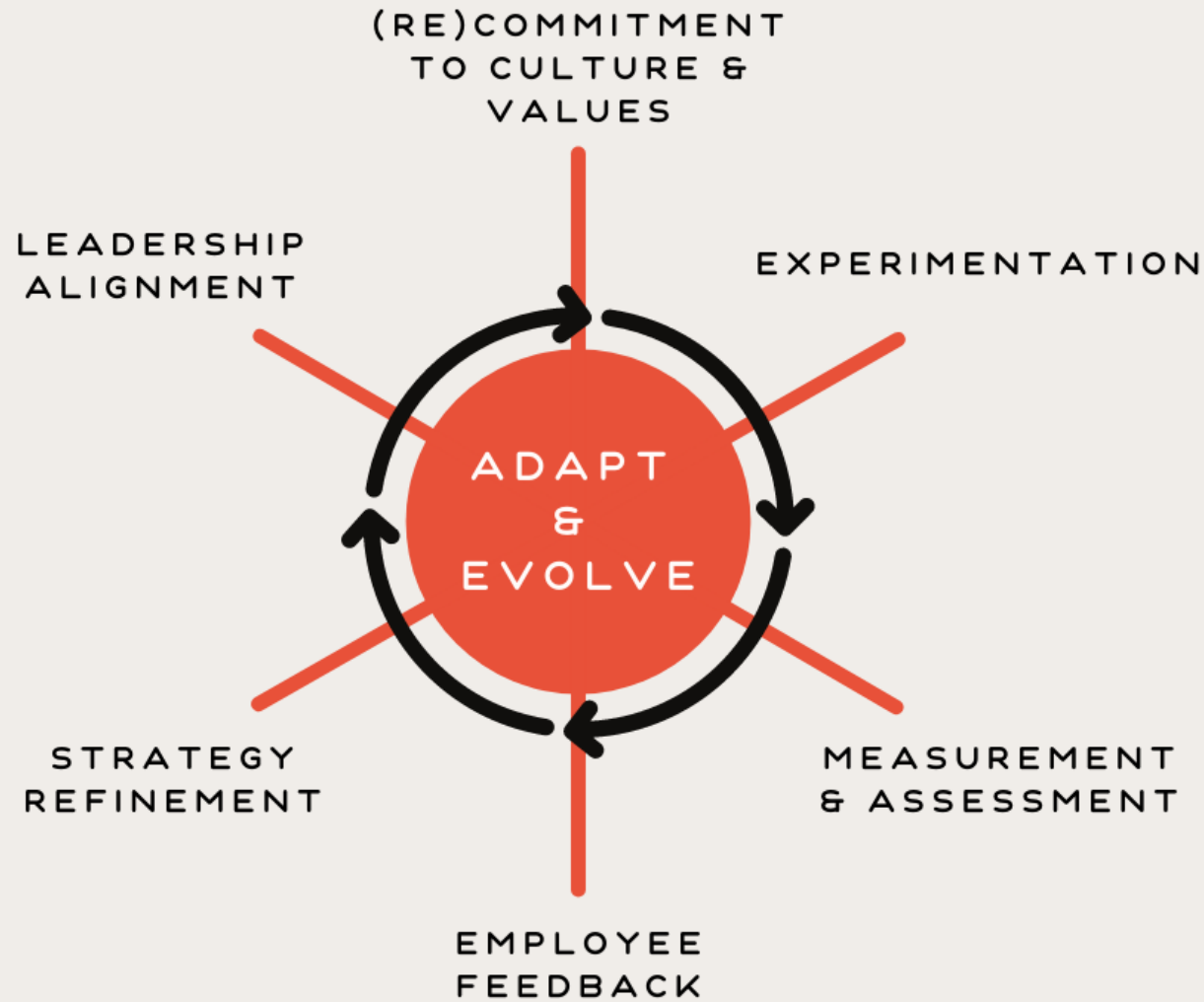


2. Managers



3. Employees

NEXT PHASE OF WORK







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Marc Siry

Vice President, Strategic Development, Comcast Business



COMCAST
NBCUNIVERSAL

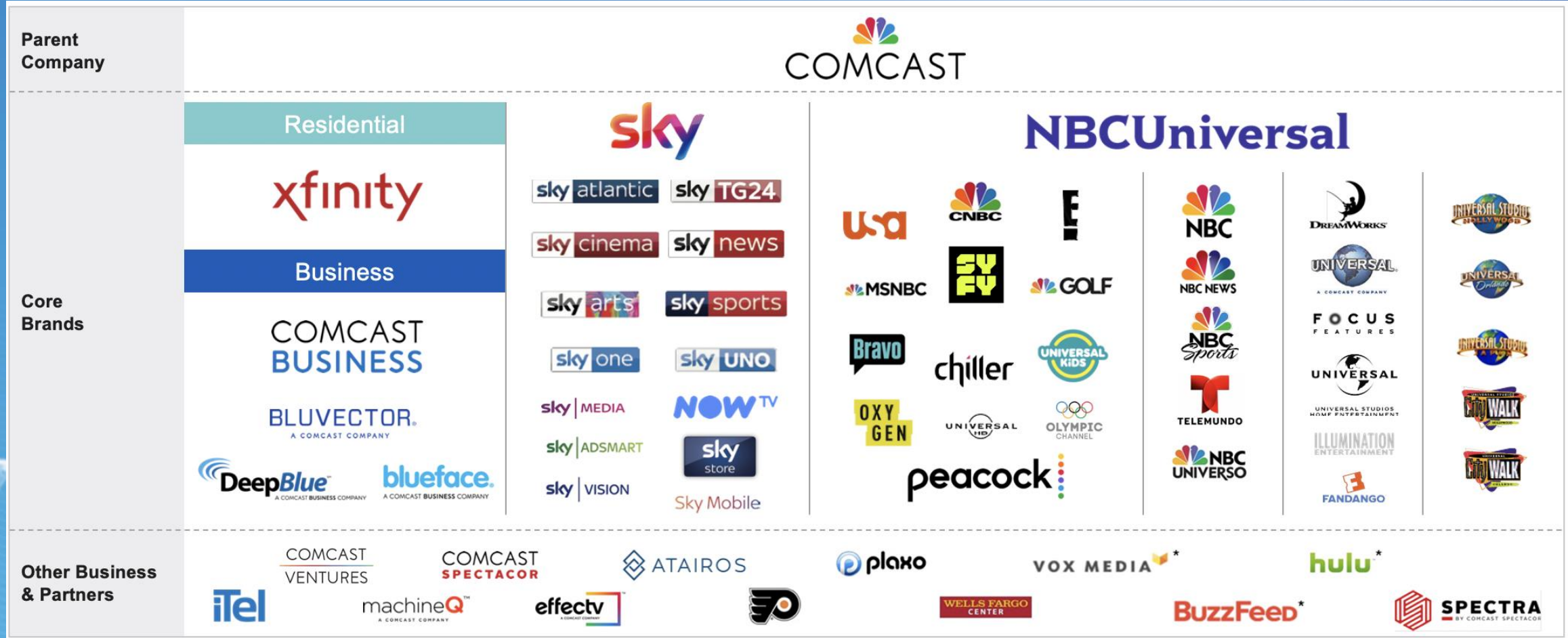
COMCAST
BUSINESS

Connectivity Evolution and
Revolution in Mobility



1956 Chevrolet 3100 Panel Van – Tupelo Community Antenna, Inc.

Today: A Media, Technology, and Connectivity Company











Thank You



COMCAST
NBCUNIVERSAL

COMCAST
BUSINESS





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Carolyn Sauer

Senior Director, MICHauto



Glenn Stevens Jr.

Executive Director, MICHauto;
Vice President, Automotive
and Mobility Initiatives,
Detroit Regional Chamber



Thank You Investors

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Wayne State University
WJR AM 760



Thank
You

PRESENTING



MICHIGAN OFFICE OF
FUTURE MOBILITY
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SUPPORTING



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IN PARTNERSHIP WITH





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