

Canada-Japan Business Symposium

November 4, 2009

Manufacturing Collaborations in Kanagawa



Steve Rodgers
President
GS Global Solutions



School Buses in Japan

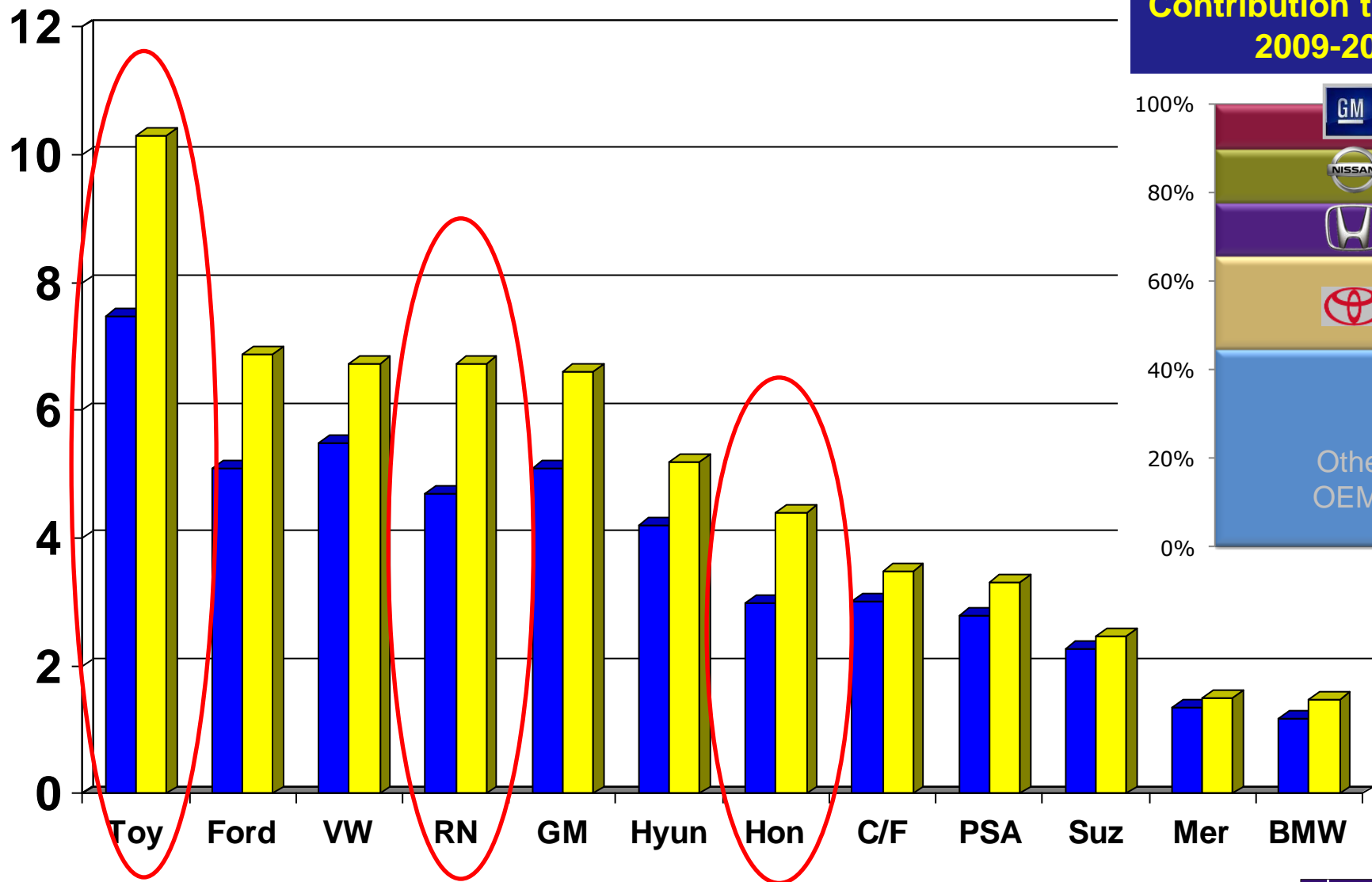


School Buses in India

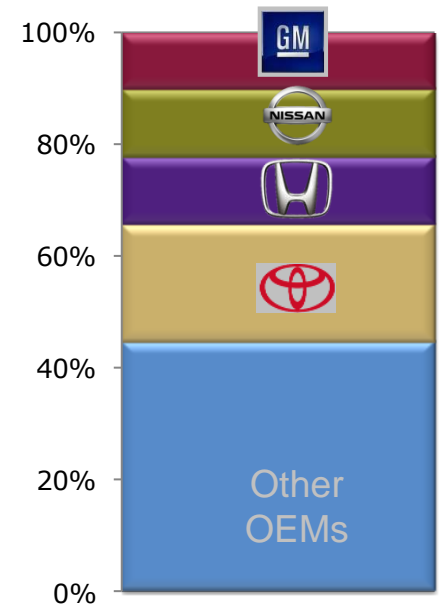


Top 12 Global OEMs

2009 -- 2011 (Millions)



Contribution to Growth 2009-2011



Source: AutomotiveCompass

Global LV Outlook

Light Vehicle Production (millions)

Region	2008	2009	2010	Average 2011-15
N. America	12.62	8.20	10.00	14.70
Europe	20.99	16.50	18.30	21.60
Asia	26.76	24.00	25.75	32.00
S. America	3.68	3.10	3.65	4.70
Total	64.05	51.80	57.70	73.00

-19%

+14%

Source: AutomotiveCompass Ltd.

Keys to Success in Japan

- **Engineering resources in right locations**
- **Consistent, global cost structures**
- **Embrace the Design In Process**
- **Partnerships where necessary**
- **Innovation first and always**
- **Simple, clean cost structures**
- **Honesty – with bad news first**
- **Global production locations**
- **Leading competitive country strategy**
- **Learn their language**

Leaders in PHEV/BEV Technology



Leaders in PHEV/BEV Technology



Source: AutomotiveCompass Ltd.

Leaders in Transportation Innovation



Source: AutomotiveCompass Ltd.

Operating in Japan

- **Essential to Good Relationships with the Japanese OEMs**
- **Many capable executives and engineers**
- **Geographic presence possible but not necessary**
- **Utilize JETRO**
- **Japan Offices were always very effective**
- **Engineering communication was very good**
- **Essential to Global automotive success**

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