



The Sixth Annual
Central European
Automotive Event

2004

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Driving Your Business In The Central & Eastern European Automotive Industry Through Collaboration And Localisation

October 19th-22nd, 2004, Renaissance Penta Hotel, Vienna, Austria

1. YOUR CHOICE OF REGISTRATION PACKAGE

REGISTRATION PACKAGES

*For pricing information see page 11

- Option A Platinum Package:** Supplier Collaboration Day + Main Two Day Conference + Russia Focus Day
- Option B Gold Package 1:** Supplier Collaboration Day + Main Two Day Conference
- Option C Gold Package 2:** Main Two Day Conference + Russia Focus Day
- Option D:** Main Two Day Conference Only
- Option E:** Interactive CD Rom If You Are Attending The Conference
- Option F:** Interactive CD Rom If You Are Not Attending The Conference

Please tick here if you do not wish to attend the Gala Dinner & Awards Ceremony. You will receive a £60/€94 discount.

2. DELEGATE DETAILS

**Please photocopy this form for multiple registrations
Yes! I will be attending AUTOCEE2004**

(Please print when completing information)

Surname (Mr/Mrs/Ms) _____

Name _____

Job Title _____

Department _____

Head of Department (if applicable) _____

Registration Contact _____

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AUTOCEE2004 Hotel Information:

Renaissance Penta Vienna Hotel, Ungargasse 60, A-1030 Wien
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 Fax WBR on:
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WWW

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Now In Its 6th Year With
Over 350 Participants!

Supplier Collaboration Day: 19 October, 2004
Main Two Day Conference: 20 – 21 October, 2004
Russia Focus Day: 22 October, 2004
Renaissance Penta Hotel, Vienna, Austria

60 speakers with
case studies from
Central & Eastern
Europe's top auto
companies, including:

Driving Your Business In The Central And Eastern European Automotive Industry Through Collaboration And Localisation

Keynote Speakers Include:



Martin Hofmann,
Head of Group
Supply Strategy,
VOLKSWAGEN

**Keynote
Guest
Speaker!**



Masatake Enomoto,
President,
TPCA CZECH



Vratislav Kulhanek,
Chairman of the Board,
SKODA AUTO



Didier Valleur,
Deputy Managing Director,
PSA TRNAVA



Jorn Reimers,
President,
VW POZNAŃ



Josef Uhrík,
Chairman Of The Board,
VW SLOVAKIA



Romuald Rytwiński,
Managing Director,
**GENERAL MOTORS POLAND,
OPEL POLSKA**

Why No Other Event Matches AUTOCEE's Ability To Deliver Need-To-Know Information & World-Class Contacts:

- The best networking: over 350 senior participants every year
- The best projects: every major project in the region covered
- The best coverage: all relevant Central & Eastern European countries featured
- The best track record: 6 years delivering the industry's annual conference

NEW Attend The Industry's Only **See p3** Annual Awards Ceremony At The Fine Arts Museum In Vienna

Join the industry's key figures as they recognise and honour exceptional corporate and personal achievement. Awards to be announced:

- Project of the Year
- Project Management Excellence Award
- Just-In-Time Manufacturer of the Year
- Fastest Growing Project of the Year
- Most Innovative Product of the Year



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AUTOCEE 2004: Lead Sponsor

The Only Event Where You Will Get Updates On All The Top Projects In Central & Eastern Europe

The AUTOCEE speaker faculty is always considered a 'who's who' of the Central European automotive industry. The quality of this year's programme is truly unrivalled. Below is just a brief selection of the senior automotive executives who will share their vast experience and meet with you in Vienna this October:



Vratislav Kulhanek, Chairman of the Board of **Skoda Auto**, will give you a strategic overview of Skoda's future development plans for local and new markets.



Francois Fourmont, Chief Operating Officer, **Dacia/Renault**, will present an assessment of the current & future opportunities for Dacia in Romania.



Romuald Rytwinski, Managing Director of **General Motors Poland and Opel Polska**, will outline Opel Polska's plans for increasing production.



Rudolf Hamp, Managing Director of **Opel Hungary Powertrain**, will share with you his experience of achieving sustainable success by using the EFQM Excellence Model.



Masatake Enomoto, President of **TPCA Czech**, will provide you with the latest update on the Kolin project, including the strategy for supplier development and management.



Jorn Reimers, President of **VW Poznan**, will reveal the practical realities of building and running an ultra-modern VW production facility.



Oleg Boyarin, General Director of **Eurocar**, will provide an evaluation of the current and future investment options in the Ukraine.



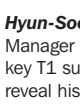
Chris Lacey, Executive Director Central & Eastern Europe, **General Motors Europe**, will give you details of the company's plans in the region.



Didier Valleur, Deputy Managing Director, **PSA TRNAVA**, will give you an update on the progress of the project and its supplier selection and management strategies.



Till Becker, President & CEO of **Mercedes Benz** in Turkey, will present you with an overview of DaimlerChrysler's work in Turkey as well as give you his views on the future of the Turkish auto market.



Hyun-Soo Kim, Deputy General Manager of **Hyundai Mobis** - one of the key T1 suppliers to Hyundai and Kia, will reveal his approach to reducing cost and maintaining the highest levels of quality through localisation of manufacturing.



Richard Meyer, Manager of International Development & Special Projects at **GM FIAT Purchasing Organisation**, will give you an overview of the company's plans in the Ukraine.



Josef Uhrík, Chairman of the Board of **VW Slovakia**, will give you a strategic overview of the company and its use of local suppliers.

See p.5

Supplier Collaboration Day - October 19th, 2004

Sponsored By: 

Winning Strategies For Building Long Term Collaborative Relationships With The World's Leading OEMs: How Can You Drive Your Business In Central & Eastern Europe?

Most of your colleagues and competitors have specifically asked to meet and hear from the purchasing organisations of the global OEMs. Just imagine how long it would take you to organise meetings with 8 top level purchasing directors from the world's global OEMs. 3 weeks? 3 months?

The hard work has been done for you!

Let's face it, the relationship between suppliers and OEMs has never been easy to manage. Customers can be demanding and a lot of your effort goes into ensuring that collaboration and full understanding is really achieved throughout the production process.

By joining the Supplier Collaboration Day on October 19th, you not only get to hear the latest supplier management and selection strategies from top level executives including:

KEYNOTE GUEST SPEAKER!



Martin Hofmann, Head of Group Supply Strategy, **VOLKSWAGEN**

Volker Riemann, Head of Purchasing, **SKODA**

Stanislav Blatnik, Performance Manager, Purchasing, **REVOZ/RENAULT**

Vice President, Purchasing, **DACIA**



Wolfgang Rohroff, Purchasing Director, **VW SLOVAKIA**



Ralf Huenerfeld, Director, Worldwide Purchasing, Poland, **GM FIAT**



Kamil Basaran, Purchasing Director, **TOFAS**



Ali Alptekin, Purchasing Director, **HONDA**

...but you also get to join the carefully prepared and moderated panel discussions, where your colleagues and competitors from the world's leading T1 suppliers will be discussing and debating the most important aspects of managing the supplier/ customer relationship in the automotive sector.

Don't miss this unique opportunity to build on your existing relationships and make new contacts with your customers!

See p.10

Russia Focus Day - October 22nd, 2004

Capitalising On Current Opportunities In The Russian Automotive Industry: Choosing The Right Strategic Partners To Drive Your Business In Russia

All of your customers (OEMs) and competitors (T1 & T2 suppliers) are currently considering Russia as the next step in their expansion. The Russian automotive market has now become a growing reality with Ford and Renault already operating and Toyota considering production in the region. The **local Russian automotive companies are also actively looking for new T1 & T2 suppliers and partners** to drive the quality of their products up to world standards. If you don't want to miss the boat then join the Russia Focus Day to meet and hear from the leaders and pioneers of the Russian automotive industry:



Alexander Yushkevich, General Director, **RUSPROMAVTO**



Georges Schiellein, Head of External Communications, **AVTOFRAMOS/RENAULT**



Alexander Soloviev, Chairman, **SOK**



Paul Hendry, Operations Director, **CONTINENTAL RUSSIA**



Pamela Smith, Finance Director, **GM-AVTOVAZ**

Valery Sokolov, Managing Director, **AVTOTOR**



Murray Gilbert, General Manager, **FORD ST PETERSBURG**



Alexei Barantsev, General Director, **GAZ**



Vadim Shvetsov, General Director, **SEVERSTAL-AUTO**



Sergei Zanozin, Chairman, **RUSSIAN BUSES**

Delegation Of Senior Representatives, **AVTOVAZ**

Can you afford to miss out on this unique opportunity to evaluate the current and future opportunities in Russia and start building relationships with these key players in the region?

The Only Truly Industry Respected Automotive Conference For Central & Eastern Europe

With the current rate of automotive investment and growth in Central & Eastern Europe, it is imperative that you keep abreast of all the new projects and developments in the region, and meet the key executives involved. AUTOCEE 2004 is the only event in Central & Eastern Europe which, through many years of growth and expansion, has become the annual gathering place for all leading auto companies in the region. With its exceptional 6 year track record, its amazing reputation in the industry, and its support from global OEMs, AUTOCEE 2004 is simply the only place where in just a few days you will:

- 1** Meet and **network with over 350 of the industry's key executives** including all of the region's OEMs.
- 2** Hear the latest developments from, and meet with, the very top executives from all your key clients and potential clients including a **special update on the TPCA Czech project** from its President Masatake Enomoto.
- 3** Get **full coverage of Central & Eastern Europe** with detailed case studies from the top automotive industrialists in the Czech Republic, Slovakia, Poland, Hungary, Romania, Slovenia, Turkey, Ukraine, Russia as well as China and South East Asia.
- 4** Benefit from **6 years of AUTOCEE conference tradition** and full support from all the key auto industry and government players in the region.
- 5** **Attend the one and only Central & Eastern European Annual Awards Ceremony & Dinner** with nominations for Project of the Year, JIT Manufacturer of the Year, Project Management Excellence, Most Innovative Product and Fastest Growing Project of the Year.

Given that AUTOCEE 2004 is the one and only event where all your key customers will be discussing and revealing their plans for the future, **can you afford to miss it?**


Attend The Industry's Only Annual Awards Ceremony & Gala Dinner At The Fine Arts Museum In Vienna

October 20th, 2004



As the one and only place where everyone in the Central & Eastern European automotive industry gathers each October, it was only natural that AUTOCEE should host the industry's annual awards. On the evening of October 20th, over 350 top level automotive executives will gather to celebrate, recognise and honour the exceptional corporate and personal achievements of their colleagues in Central & Eastern Europe.

The awards that will be announced and presented are:

- **Project of the Year**
- **Just-In-Time Manufacturer of the Year**
- **Most Innovative Product of the Year**
- **Project Management Excellence Award**
- **Fastest Growing Project of the Year**
Sponsored by: Geodis Solutions 

Every year our delegates tell us that meeting AUTOCEE's participants in an informal atmosphere is one of the most rewarding and unique aspects of the conference. Nowhere else will you be able to make so many vital personal contacts and network with so many key people in the industry in just one evening. On October the 20th all AUTOCEE 2004 delegates will be invited to gather at one of the most beautiful and impressive architectural and historical monuments in Vienna, the Fine Arts Museum. The Gala Dinner will follow on from the AUTOCEE Awards Ceremony with drinks, a splendid 4 course meal and entertainment at the end of the evening.

Don't miss this unique opportunity to get to know your colleagues and clients personally. After all, personal contact is what drives your business!

So What Do Your Peers And Competitors Think Of AUTOCEE?

"AUTOCEE provides you with the opportunity to meet with all of the key players in the Central European automotive industry"

Dr Carl Hahn, Chairman Emeritus, VOLKSWAGEN

"Top level speakers with the latest key, need-to-know information"

Vratislav Kulhanek, Chairman, SKODA AUTO

"AUTOCEE - a must attend for anyone who is serious about winning business in the Central & Eastern European automotive market"

Ervin Applefeld, Managing Director, TRW

"A truly informative and enriching experience bringing together the automotive industry leaders"

Alvin Mingle, Global Sourcing Development Manager, FORD

"The key event for meeting with the most senior executives of the region"

Alfredo Altavilla, Corporate Development Manager, FIAT AUTO

"Great speaker panel and great level of delegate participation"

Marko Lekse, Supplier Relationship Manager, REVOZ SLOVENIA

"Great networking opportunities"

Jan Hanzl, Director, Investment Support Division, CZECHINVEST

"Excellent variety of case studies"

Manfred Bauder, Member of the Board, Finance, VOLKSWAGEN SLOVAKIA

AUTOCEE is the only truly respected event for the automotive industry in Central & Eastern Europe. Through the years AUTOCEE has welcomed over 2,000 top automotive professionals at the conference.

Here is just a sample of companies that regularly attend AUTOCEE:

Fiat Auto • RusAvtoProm • Fezko • Saint-Gobain • Johnson Controls • AvtoVAZ • Volkswagen • Adam Opel • Skoda Auto • Michelin • Citroen Polska • Dacia/Renault • Daihatsu Motor Company • Volvo Cars • ASEC • EDS • Connaught Electronics • Hungarian Investment Agency • NABI Hungary • Quaker Chemical • Czech Automotive Industry Association • Zastava • Pal International • Avery Dennison • Bekaert • Corning Inc. • Schnellecke Group • Henkel Polska • Rencol Tolerance Rings • Splintex Czech • Tatra • Gates Polska • R.L Polk • Raba • Avon Automotive • Autozakup • Thyssen Kerex Aluminium • Rubena • BMW • Contitech Vegum • Cegelec • EBRD • Delphi Automotive • Auto Plaza • GE Electronic • ITW Automotive Products • Jato Dynamics • Akzo Nobel Coatings • General Motors Poland • Lucchini • Opel Hungary • Miba Sinter • AB Elektronik • Audi Hungaria Motor • Fiev • PSA • Renault • Magyar Suzuki • IMG Polska • Cooper - Standard Automotive • Allevard Rejva Auto • TI Automotive • Cascade Engineering • Pilkington Automotive Poland • Continental • Kautex Textron Bohemia • Rzeczpospolita • Rieter Automotive Systems • Denso • Hoedlmayr International • SAS Autosystemtechnik • FAURECIA Exhaust Systems • SAI Automotive Bratislava • Agoria • A Raymond Jablonec • Brano Group • D Plast-Eftec • Eagle-Picher Automotive • Kirchoff Polska • Knorr Bremse • Rautenbach Slovakia • Asso Filtry • Tower Automotive • Centra • Peguform • Kiekert • Usinor • Basell France • Benteler • Automobile Group • ABB • Viza Automocion • J.C. Bamford Excavators • Severstal Auto • Ford Motor Company • POL-ORSA • AutoSysteme • Magnesium-Electron • Polynorm • American Axle • CzechInvest • Dura Automotive Systems • Recticel • Intralox • Grupo Antolin • ESAB Slovakia • Intier Automotive Interiors • Aisin Europe • Orsa-Moto • Wagon Automotive • Essa Czech • Continental Matador • SAS Automotive • SARIO • Opel Polska • TVP Tadis • Horst Mosolf • Voestalpine Stahl • SAPA Automotive • Aeroquip Wolfsburg • TRW Automotive • Mann & Hummel • GM-Avtovaz • Hutchinson • Plastic Omnium • Grammer • Tenneco • Group Hamann • Automotive Lighting • Biazet El • Paneuro Company • Showa Aluminium • Debica Tyre Co • Nemak Europe • Honda • Revoz • Covisint • Eaton • Hayes Lemmerz Alukola • Toyota Motor Corporation • IMMO Industry Group • Renishaw • GM-FIAT • AIG LINCOLN • DaimlerChrysler • IRE-TEX PRAHA • Venture Industries • Heat Transfer Tonder • Kostal • Inergy Automotive Systems • Dow Automotive • Robert Bosch • Ruecher • Textile Bonding • BASF • The Timken Company • US Steel Kosice • Daihatsu Motor Company • Pavlovo Bus Plant • ITOCHU Corporation • TPCA • KATRING • Arcelor Auto • CMS Group • Avtotor Holding • The Torrington Co • 3M • Apia • Autonika Holding • BOSS • Delco Remy • MATADOR • Mercurio Group • Auto Plaza • SG Bank • Motorpal • Bulgarian Foreign Investment Agency • Autoliv Romania • Marketing Systems • PAIZ • Schenker • MAN Polska • Autofacts • Fabrimetal • Degussa • CentreInvest • Reuters • QUAD • Raufoss Technology • Saturns • Scania • DHL • Urban Science • Joloda International • Vivendi • GEFCO • SAT • Vibacoustic • BTR Automotive Selling • Linklaters • Euratec • Citibank • ITD Hungary • Stako • Sumitomo • TecCom • Industry Planung Fischer • Daewoo Ukraine • Schaumann Wood • Agoria • Miller, Canfield, Paddock & Stone • Ryder • Samar • Mann Filtr • Parker Poland • Oracle • Mannesmann • Tennex • Calsonic • CDS • AS Norma • Euro Corporate Finance • Isuzu Motors • ABN Amro • AT Kearney • Alcatel • Solvay Automotive • Temic • Magna Automotive • Emery Worldwide • Iveco • Ascometal • Ministry of Economy Poland • SAP • Mitsubishi • Morst Mosolf • PricewaterhouseCoopers • Elf Lubricants • John Stokes & Sons • AAA AutoPraha • NYK Logistics • Mostva • SDC International • ICI • LPA Software • Covisint • Brain • Siebe Automotive • SkoFIN • Business Lease • Business Management & Finance • Calligen • Arthur D Little • Findlay Automotive • Magnetti Marelli • Kdynium • Advanced Elastomer Systems • Bovis Lend Lease • Geodis • GNK • Lucas Aftermarket • Mackie Automotive Systems • Boston Consulting Group • Majosz • Kulczyk Tradex • Wix Filtron • Perception • PPG • Nissan Europe • Nizegorod Motors • Sekurit • European Commission Psion Teklogix • Hamburger Hafen • Hydro Aluminium Precision Turbine • Harada Industries • Schuler Pressen • Opel Hungary Powertrain • Frans Maas • Freemarkets • Funder Industrie • Coventry Business School • Sick AG • Atlas Copco • Cracier Vandervell • Deloitte & Touche • Peugeot • Visteon • VSZ Holdings • TOFAS • KIA Motors Poland • Barum Continental • Valeo Auto System • Bosch Uklady Hamulcowe • Volvo Truck Corporation • Knott • Lear Corporation Poland • SKF • Arvinmeritor • Faurecia Automotive • Behr • GAZ



Supplier Collaboration Day, Tuesday 19th October 2004

Sponsored By: **PRICEWATERHOUSECOOPERS**

Winning Strategies For Building Long Term Collaborative Relationships With The World's Leading OEMs: How Can You Drive Your Business In Central & Eastern Europe?

Based on months of research with T1 and T2 suppliers in Central & Eastern Europe, the Supplier Collaboration Day is specifically designed to give you a detailed insight into how your customers choose, manage and change their suppliers. Some of the most influential and sought after purchasing executives from the world's leading OEMs will give you a detailed overview of the critical strategic information you need to understand in order to become their preferred supplier. You will also be able to question and debate your key supplier management challenges during our carefully prepared panel discussion where your peers, from leading T1 suppliers, will provide the OEMs with your point of view. It will take you weeks, if not months, to achieve what you can achieve in just one day at the AUTOCEE 2004 Supplier Collaboration Day!

8:30-9:00 Coffee & Registration

9:00-9:15

Chair's Welcome Address



Matthew Pottle,
Partner, Head of Regional Automotive Practice, PRICEWATERHOUSECOOPERS



Matthew Pottle heads up PricewaterhouseCoopers' Central & Eastern European automotive practice, which includes amongst its clients many of the region's leading vehicle makers and suppliers. He has extensive experience of advising foreign investors coming into the region and has for many years led a number of projects in the area of process improvement.

9:15-9:55 KEYNOTE GUEST SPEAKER!

Supplier Collaboration - The New Challenge: Managing Multi-Tier Supplier Relationships



Martin Hofmann,
Head of Group Supply Strategy, VOLKSWAGEN



For the first time in its history AUTOCEE delegates will be welcoming the most senior purchasing executive at Volkswagen as the keynote guest speaker. Don't miss your chance to hear the strategy behind the entire company's multi-tier supplier relationship management approach.

9:55-10:35

How Skoda Has Developed And Implemented An Effective Supplier Selection And Purchasing Strategy: Balancing Centralised Control With Local Decision Making

Volker Riemann,
Head of Purchasing,
SKODA



If you are working in Central & Eastern Europe, then winning business from Skoda must be on your agenda. Join Volker Riemann, the most senior purchasing executive at Skoda, to learn first hand his strategy and practice of:

- evaluating your local needs for products purchased on a global basis
- setting guidelines for centralised strategic supplier evaluation and selection
- ensuring full transparency of communication with current and potential suppliers
- assessing suppliers to determine the ones that can be managed globally
- ensuring that local and smaller suppliers are not alienated by your global sourcing practice
- reducing the total cost of ownership by leveraging your local market strength through global purchasing

10:35-11:15

Managing The Challenges And Risks In Emerging Market Supply Chains



John Hadley, Head of Automotive Emerging Markets (Europe),
PRICewaterhouseCOOPERS



The enlargement of the European Union and economic developments in China and Russia are forcing change in global sourcing patterns. For many western European automotive suppliers, the pressure to reduce purchasing and manufacturing costs has become overwhelming. To help automotive suppliers develop effective strategies for investing and sourcing in these new markets, PricewaterhouseCoopers has analysed the drivers behind low cost sourcing and the risks related to investing in emerging markets. John Hadley will talk about PricewaterhouseCoopers' view on:

- why companies need to move to low cost production and sourcing strategies
- the risks involved in emerging markets
- the steps that need to be taken to reduce these risks and develop a successful sourcing strategy

11:15-11:45 Morning Coffee

11:45-12:25

Adding Value Through Partnerships With Localised Just-In-Time Suppliers



Wolfgang Rohroff,
Purchasing Director,
VW SLOVAKIA



Following on from VW Slovakia's massively popular presentation last year focused on the key aspects of JIT production, we have asked Wolfgang Rohroff to return and reveal exactly which supplier management strategies and techniques lie behind the legendary success of JIT production:

- evaluating your current relationships with JIT suppliers
- assessing the key criteria for choosing JIT suppliers
- maximising transparency and continuous communication with your JIT suppliers
- integrating your suppliers into every step of production: giving them more responsibility and control
- measuring the cost savings on transport and logistics: how much value do JIT suppliers bring to your overall cost?
- maximising the use of local suppliers

12:25-13:05

INTERACTIVE PANEL DISCUSSION:

Assessing The Future Impact Of Supplier Localisation In Central & Eastern Europe: Will You Have To Expand Your Operations In The Region To Gain More Business?

Following many requests from last year's delegates, we are making the Supplier Collaboration Day a much more interactive event. Not only will you hear from your customers how they manage their suppliers, but you will also have the opportunity to debate, discuss and exchange experiences on the challenges of managing customers during our interactive panel discussions. Have your say in the relationship with OEMs, don't let them dictate the discussion! Join our carefully selected panellists, who will lead the debate on:

- assessing the current supplier sourcing practice for key projects in Central & Eastern Europe
- evaluating the advantages of being based locally: to what extent does it help win new business?
- key strategies for growing your business with existing local customers
- developing collaborative purchasing techniques to alleviate the ever increasing pressure on prices
- measuring cost savings and business growth related to new investments in Central & Eastern Europe: to what extent can you expect to grow your business from producing in the region?



Marcel Bachraty,
Customer Service, East Europe,
TOWER AUTOMOTIVE



Patricia Burger,
Sales Director,
HUTCHINSON



Boris Sluka,
Director,
PLASTIC OMNIUM SLOVAKIA



Jurgen Peitz,
General Manager,
SAINT GOBAIN

13:05-14:20 Lunch for Delegates & Speakers

14:20-15:00

An Update On The Revoz/Renault Project In Slovenia: Expanding Your Supplier Base To Accommodate Production Increases

Stanislav Blatnik,
Performance Manager, Purchasing,
REVOZ/RENAULT

With Renault recently announcing it will expand its production capacity at Revoz Slovenia, it is imperative that you find out details of the planned production volumes and models as well as how you can best grow your business with the company.

- outlining production plans
- developing a consistent and fair supplier quality assessment strategy
- using collaboration to achieve new production targets
- effectively dealing with poor quality: strategies for penalising and encouraging your suppliers

15:00-15:40

Building A Win-Win Relationship With Your Suppliers: What Value Can Suppliers Bring To A Collaborative Purchasing Strategy?



Ralf Huenerfeld,
Director, Worldwide Purchasing, Poland,
GM FIAT



Ralf Huenerfeld is in charge of all purchasing for GM Fiat in Poland including Opel Polska and Fiat Polska. Learn about the unique structure of the purchasing organisation at GM Fiat, and find out what qualities and aspects of your work are most valued by GM Fiat Worldwide Purchasing. Ralf will focus on:

- evaluating the current dynamics of supplier/customer relationships at GM Fiat Worldwide Purchasing
- assessing the key benefits of strategic collaboration with suppliers: what can and should you bring to the relationship?
- setting consistent and achievable requirements for the suppliers
- managing the ever increasing pressure on pricing
- using collaboration as the key to success

15:40-16:10 Afternoon Coffee

16:10-16:50

An Overview Of Honda's Strategy For Sourcing From Central & Eastern Europe And Other Low Cost Regions

Ali Alptekin,
Purchasing Director,
HONDA

For the first time, AUTOCEE delegates will be welcoming a senior representative of Honda as a key speaker. Winning the business of a western OEM that doesn't operate in Eastern Europe could be very lucrative for both parties. Find out how you can become the company's trusted supplier worldwide:

- outlining Honda's key strategies for sourcing suppliers from Central & Eastern Europe
- establishing a transparent supplier/customer management strategy
- what value can a supplier based in Central & Eastern Europe bring to a global OEM?
- measuring the cost savings and benefits of sourcing from suppliers based in Central & Eastern Europe

16:50-17:30

Developing A Transparent And Collaborative Relationship With Your Suppliers And Partners To Mitigate Risk And Ensure Maximum Profitability For Both Parties

Vice President,
Purchasing,
DACIA/RENAULT



Our long standing speaker Erik Bergelin is leaving his post as Vice President of Purchasing at Dacia and it will be our pleasure to welcome the newly appointed Vice President of Purchasing at AUTOCEE 2004. Take this unique opportunity to make a new contact and learn about Renault/Dacia's supplier development plans and the company's role in developing the automotive sector in the region.

- evaluating the benefits of actively managing a collaborative relationship with a supplier
- establishing clear communication channels with your suppliers in order to better integrate them into your production
- ensuring the implementation of the most efficient supplier management processes to improve on-time delivery and achieve 100% right first time

17:30-18:00

Ensuring Transparency And Managing Risk Throughout The Entire Value Chain: A Case Study From TOFAS Turkey



Kamil Basaran,
Purchasing Director,
TOFAS



Last year's presentation by Antonio Bene, CEO of TOFAS, focusing on the current and future investment options in Turkey, generated a lot of interest from our AUTOCEE delegates. This year, you will hear a more in-depth practical case study from Kamil Basaran, in charge of selecting and working with the company's suppliers:

- assessing all aspects of supplier evaluation and selection at TOFAS
- building strong long-term relationships with suppliers
- using collaboration and partnership to maximise productivity
- how can you become a supplier to TOFAS?

AUTOCEE2004 MAIN CONFERENCE

Day 1 – Wednesday 20th October 2004

8:30-9:00 Coffee & Registration

9:00-9:15

Chair's Welcome Address



Georg Graf Waldersee,
Area Markets Leader CEE, Member
of the Board, ERNST & YOUNG



9:15-9:45 **HYUNDAI CHOOSES SLOVAKIA!**

A Detailed Overview Of The KIA Project In Slovakia (Invited)

We are currently liaising with the top officials at KIA Slovakia to bring you a senior executive speaker to update you on the very latest information on the company's plans for what is the largest automotive investment in Central & Eastern Europe.

9:45-10:15

**A Strategic Overview Of Skoda's Future Development Plans:
Penetrating Unexplored Markets Whilst Increasing Local Market Share**



Vratislav Kulhanek,
Chairman Of The Board,
SKODA AUTO



It is our great pleasure to welcome back our regular keynote speaker and AUTOCEE's long standing supporter Vratislav Kulhanek, Chairman of the Board of Skoda. This year, Mr Kulhanek will reveal the details behind Skoda's plans and strategy to maintain its leading position in the region as well as expand into new markets:

- evaluating the major areas for future growth in Central & Eastern European markets
- an overview of Skoda's current and future production and development plans
- an analysis of Skoda's plans for new production sites in low cost countries
- Skoda's strategy for taking on the newly arrived competition from Asia and Western Europe

10:15-10:45

**The TPCA Kolin Project - Latest Update: Outlining The Strategy For
Supplier Development And Management In Central & Eastern Europe**



Masatake Enomoto,
President,
TPCA CZECH



As TPCA Czech approaches the start of production, Masatake Enomoto, President of the project, returns to AUTOCEE 2004 to provide you with an update on:

- the current state of project development
- supplier development projects in Kolin and Slovakia
- the implementation of Toyota quality and productivity standards in the new production facility
- production plans, volumes and timescales

10:45-11:15 Morning Coffee

12:45-14:00 Lunch for Delegates & Speakers

14:00 - 18:10 CONCURRENT SESSIONS (STREAM A OR B)

STREAM A

14:00-14:30

**An Overview Of GM Fiat's Plans In The Ukraine:
Going Beyond The European Union**



Richard Meyer,
Manager International Development
& Special Projects, GM FIAT WORLDWIDE PURCHASING



With 13 new members joining the EU, countries like the Ukraine are becoming more interesting and promising in terms of costs, savings and efficiency. Learn from Richard Meyer, Head of Special Projects at GM Fiat, about the company's plans in the Ukraine, in particular from its worldwide purchasing organisation's point of view. Richard will focus on:

- assessing the Ukraine as a potential production/sourcing base
- building relationships with local suppliers
- looking into the future of GM Fiat in the Ukraine: timescales and volumes

14:35-15:05

**Outlook On The Past & Current Trends In The Development Of
The Automotive Industry In Central & Eastern Europe**



Markus Frömgen,
Business Unit Director, Strategic
Planning & Forecasting, R. L. POLK EUROPE



For years R. L. Polk has been the global leader in automotive intelligence. In-depth knowledge of the car industry, the integrity of R.L.Polk's market data and forecasting expertise enables manufacturers to make confident decisions on product design, building and selling of cars in different markets. With the new countries joining the EU, accurate mid and long term model strategies have become more important than ever. Join R.L. Polk to hear the different industry development scenarios and their impact on your sales and production.

- development of new car registrations and production figures
- analysis and comparison on the evolution of the past & future car demand for vehicles produced in the region

STREAM B

14:00-14:30

Achieving Sustainable Success By Using The EFQM Excellence Model



Rudolf Hamp,
Managing Director,
OPEL HUNGARY POWERTRAIN



For the last 4 years, Rudolf Hamp has been implementing the European Foundation for Quality Management model at Opel Hungary. Benefit from the experience of managing a 900 people production facility and learn how at Opel Hungary they:

- balance the needs and expectations of stakeholders
- implement a total enterprise strategy
- integrate excellence into the production processes
- ensure that they base their work on trust, knowledge sharing and integration with partners

14:35-15:05

SAP For Automotive: The Smart Choice



Kerstin Geiger,
Vice President, Automotive Industry
Business Unit, SAP



With over 30 years in the business of helping businesses grow, SAP for Automotive is a flexible approach to supporting organic growth or expansion via mergers and acquisitions. SAP for Automotive is the smart choice to support new business areas, portfolios and geographies and can improve decisions with better information to support global operations. Join Dr. Kerstin Geiger as she describes how SAP for Automotive can:

- help companies plan and execute with enhanced solutions for the automotive industry
- support your company's expansion to new business areas
- provide seamless integration of all key areas of your enterprise

11:15-11:45

**The PSA Trnava Project – Latest Update:
Outlining The Strategy For Supplier Selection And Production**



Didier Valleur,
Deputy Managing Director,
PSA TRNAVA



Last year you heard from Jean-Francois Lecercq, Deputy Managing Director of PSA Trnava, about the company's plans for the future of the project. This year we are delighted to bring you Didier Valleur, who is also the Deputy Managing Director of PSA Trnava in Slovakia and is responsible for the day-to-day running of the project. He will give you an up-to-the-minute update on:

- the progress of the PSA Trnava project in the last 12 months
- the supplier selection process and current supplier selections
- the project's objectives for the use of local suppliers

11:45-12:15

**Information Technology:
A Core Competency Of Automotive Companies?**



John Wargin,
Director, Automotive Industry,
HP



Capital, labour and materials are the classic resources of the automotive industry. In the past, information technology was not considered to be a core competency of automotive companies. But IT can be a deciding factor in the economic success of automotive companies, especially in the Central European automotive landscape. Join John Wargin as he makes a strong case for positioning IT high on your agenda, adding a fourth economic imperative to the industry - INFORMATION:

- assessing the importance and impact of IT on your business in terms of: operational excellence, integration of processes, and innovation
- using strategic IT investment and portfolio management to maximise the value and agility of your business
- why invest in IT in Central Europe?
- making IT your core competency through the creation of a new "mind set" in your business

12:15-12:45

**The Practical Realities Of Building An Ultra-Modern, Volume-Optimised
Production Facility To Improve Quality, Efficiency & Flexibility**



Jorn Reimers,
President,
VW POZNAN



If you are working in Central & Eastern Europe, then Volkswagen must be on your client/potential client list. For the first time in several years, you will have a great opportunity to meet in person and learn first hand from Jorn Reimers, the most senior executive at VW Poznan, about the company and its achievements in:

- transforming an assembly plant into a full scale vehicle manufacturing facility
- ensuring effective use of local skilled labour: establishing and maintaining the VW culture
- how to develop volume-optimisation to maximise flexibility of production

15:10-15:40

The Daewoo/Chevrolet Perspective On Developments And Opportunities In Central & Eastern Europe



**Chris Lacey, Executive Director,
Central & Eastern Europe,
GENERAL MOTORS EUROPE**



When General Motors acquired certain assets of the Daewoo Motor Corporation in 2002, the assets acquired didn't include any of the former Daewoo production facilities or sales companies in Central & Eastern Europe. However, shortly after the new GM Daewoo Auto & Technology Company was formed in Korea, Korean manufactured products came on sale again in Central & Eastern Europe. The products are now sold in 18 countries in the region as both Daewoos and Chevrolets through a new organisation. How did this come about, and what are the opportunities for Daewoo/Chevrolet in Central & Eastern Europe? What are the differences in strategy from four years ago? And will sales levels rise to those of the former company? Chris Lacey's presentation will give you full details on the above mentioned issues.

- the company's market position in the region
- current and future plans for Daewoo/Chevrolet in Central & Eastern Europe
- timescales and major areas of growth

15:40-16:10 Afternoon Coffee

STREAM A

16:10-16:40

Increasing Productivity And Quality Through Staff Motivation And Development



**Jan Vlasak,
Managing Director,
ARVIN EXHAUST**



Staff motivation and development has been mentioned by over 90% of the AUTOCEE delegates as one of the most important and burning issues on their agendas. Benefit from Jan Vlasak's great experience of managing, motivating and developing staff at Arvin Exhaust in the Czech Republic and learn how he:

- develops a consistent and effective employment strategy
- takes full advantage of the local skill base
- establishes long and short term training as well as development programmes for all levels of employees
- gets valuable employees to stay in their jobs

16:45-17:15

Developing And Implementing An Effective Human Resources Management Strategy: How Can You Establish A Good Working Culture In Your Production Facility?



**Erich Zipser, Managing Director &
Chairman of the Board,
HAYES LEMMERZ AUTOKOLA**



Following on from the Arvin Exhaust case study, Erich Zipser will share his experience and knowledge of maximising the benefits of working with the local, highly educated labour force in Central & Eastern Europe. Erich will focus on:

- key criteria & successful strategies for personnel selection: choosing the right people
- establishing a consistent and effective management selection & training strategy
- working with the local universities to source skilled personnel
- developing a long term training programme for your personnel
- analysing the benefits of establishing and maintaining a unified company culture throughout your production facilities in Eastern Europe

17:20-18:10 PANEL DISCUSSION

Can You Meet The Cost Targets Set By Your Customers Whilst Maintaining Maximum Quality & Flexibility?

The issue of ever increasing pressure on prices has always been difficult to resolve and concerns every single delegate at the AUTOCEE conference. So we have decided to give you an opportunity to join a panel discussion with some of our most experienced and well known conference speakers, including:



**John Morgan,
Senior Manager,
CONTINENTAL SOUTH EAST ASIA**



**Erich Zipser, Managing Director &
Chairman of the Board,
HAYES LEMMERZ AUTOKOLA**



**Francois Lecavalier,
Senior Banker,
EBRD**



The panel discussion will be carefully prepared and moderated by our chairman and you will be encouraged to ask questions and make statements from the audience during the discussion. Don't miss this unique chance to have your say and be heard by your colleagues, competitors and customers! The panel discussion includes but is not limited to the following issues:

- assessing the strategic benefits of localising production to service your clients in Eastern Europe
- working in partnership with a local partner: what are the key challenges and advantages?
- ensuring the highest level of production and service: can you bring western standards to your East European operations?
- assessing the benefits & challenges of using local T2 & T3 suppliers: savings vs. quality

15:10-15:40

A Detailed Overview Of DaimlerChrysler's Growing Presence In Turkey: What Potential Does The Turkish Automotive Sector Have?



**Till Becker,
President & CEO,
MERCEDES BENZ TURKEY**



If your company or your clients are considering Turkey as a possible new area of expansion, then Till Becker, who has been President & CEO of Mercedes Benz Turkey since early 2000, is an absolutely invaluable source of strategic and practical information as he discusses:

- developing a successful joint venture with a local partner
- localising your suppliers to minimise costs and grow production
- how to best work with local suppliers
- assessing the potential for local market sales
- examining the key benefits of operating in Turkey: why should you be there?

STREAM B

16:10-16:40

Reducing Cost And Maintaining The Highest Levels Of Production Quality Through The Localisation Of Your Manufacturing



**Hyun-Soo Kim,
Deputy General Manager,
HYUNDAI MOBIS**



As KIA Slovakia finalises its plans for the development of its production facility in Zilina, it is imperative that you stay up to date on the project's supplier localisation strategy as well as hear first hand from the company's current suppliers their plans for establishing production in Slovakia. Don't miss this unique opportunity to make a personal contact and learn from Hyun-Soo Kim, Deputy General Manager at Hyundai Mobis, one of the key T1 suppliers to Hyundai worldwide:

- Hyundai Mobis' plans for establishing a production site in Slovakia
- production volumes for the KIA project
- will Hyundai be looking to service other customers in the region?
- Hyundai Mobis' supplier sourcing and management strategy

16:45-17:15

Assessing The Long-Term Role Of The Front End Module Sector: What Are The Major Challenges And Opportunities?



**Thomas Hedenborg,
Chief Executive Officer,
HELLA-BEHR PLASTIC OMNIUM**



OEMs around the world have been increasingly relying on their suppliers' ability to produce more complex and sophisticated modules and deliver them just in time to the production line. Hear how modular production is likely to affect your business in Central & Eastern Europe, where Hella-Behr is one of the leaders in this new industrial trend:

- evaluating the current and future deliverable benefits of modular production
- reducing vehicle assembly time
- reducing investment in assembly tooling
- assessing the benefits and challenges of handing responsibility to a T1 supplier in modular production
- evaluating the role of T2 suppliers in modular production

17:20-18:10 PANEL DISCUSSION

How Can You Overcome The Challenges Of Localising Your T2 & T3 Supplier Network In Order To Drive Down Costs Whilst Maintaining Quality & Flexibility?



**Peter Knobloch,
Sales Director,
PLASTIC OMNIUM**



**Josef Blecha,
General Manager,
FEZKO**



**Vice President,
Purchasing,
DACIA**



With ever increasing pressure on prices, the challenge of driving down costs is now at the top of every supplier's agenda. Soon you will find it imperative that your T2 & T3 suppliers are operating in the same country and location as you and your customers. Discuss and debate just how quickly you will have to localise your suppliers in order to compete in the region:

- assessing your relationship with OEMs and your suppliers
- ensuring that your supplier selection process is completely transparent
- maximising cost transparency: to what extent does price determine the winner?
- outlining all criteria in the supplier selection process
- evaluating the benefits of working with localised suppliers
- how can your customer, the OEM, help you localise and improve the relationship with your suppliers?

18:15-19:15 Unique & Interactive Informal Roundtable Discussion Groups With Key Speakers!

These interactive and informal discussion groups are without a doubt one of the highlights of every AUTOCEE conference. They offer you an excellent opportunity to probe the knowledge and expertise of the speaker faculty, ask them to address issues which were not covered in their presentations, exchange information and ideas, and most importantly meet the key industry players in person. Each group is facilitated by one of our conference speakers and is limited to 12 participants to ensure you have every opportunity to contribute to, and benefit from, this unrivalled experience. And the relaxed atmosphere will be enhanced by a glass of champagne!



Vratislav Kulhanek,
Chariman Of The Board,
SKODA



Jozef Uhrík,
Chairman Of The Board,
VW SLOVAKIA



Didier Valleur,
Deputy Managing Director,
PSA TRNAVA



Wolfgang Rohroff,
Purchasing Director,
VW SLOVAKIA



Romuald Rytwinski,
Managing Director,
GENERAL MOTORS POLAND & OPEL
POLSKA



Till Becker,
President & CEO,
MERCEDES BENZ TURKEY

Volker Riemann,
Head of Purchasing,
SKODA

Hyun-Soo Kim,
Deputy General Manager,
HYUNDAI MOBIS



Chris Lacey,
Executive Director Central & Eastern
Europe,
GENERAL MOTORS EUROPE



Richard Meyer,
Manager International Development
and Special Projects,
GM FIAT WORLDWIDE PURCHASING

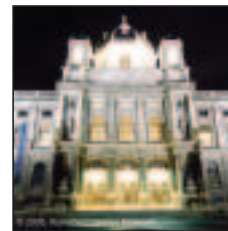
Ali Alptekin,
Purchasing Director,
HONDA

See p3

19:30 AUTOCEE 2004 Annual Gala Dinner & Awards Ceremony At The Fine Arts Museum, Vienna

Your industry is driven by having the right business contacts to get the deal done. Time and time again, delighted attendees tell us that so much of AUTOCEE's impact comes from the informal meetings and discussions that take place at the social functions around the conference. In addition to the refreshment breaks and sit-down lunches, AUTOCEE 2004 has a special evening event organised to facilitate even more networking in an informal atmosphere. Join this truly unique evening where you will celebrate, recognise and honour the exceptional corporate and personal achievements of your colleagues in Central & Eastern Europe during the AUTOCEE 2004 Awards Ceremony, followed by a Gala Dinner and special entertainment. Spend an entire evening meeting conference speakers, delegates and sponsors.

Remember to bring lots of business cards!



Day 2 – Thursday 21st October 2004

8:30-9:00 Coffee & Registration

9:00-9:15 Chair's Welcome Address

9:15-9:45

Assessing The Future Of The Slovak Automotive Sector: Will Slovakia Become The Detroit Of Europe?



Pavol Rusko,
Deputy Prime Minister & Minister
Of Economy, SLOVAK REPUBLIC

(pending final confirmation)

Automotive production and investment in Slovakia continues to outpace any earlier predictions, with most global OEMs and suppliers currently looking to produce and source from the country. The Slovak government is especially interested in supporting the new automotive investors. Find out how you can further drive your business in Slovakia:

- examining the geographical, strategic and economic advantages of investing in Slovakia
- why and how did Slovakia attract all the large automotive projects in the past year?
- assessing the government's plans for infrastructure development to attract further investment
- how will your company benefit from investing and establishing operations in Slovakia?
- the 5-10 year economic outlook for Slovakia

9:45-10:15

A Strategic Overview Of VW Slovakia And Its Use Of A Local Supplier Base In Slovakia



Jozef Uhrík,
Chairman Of The Board,
VW SLOVAKIA



Dr Uhrík has been with Volkswagen in Bratislava since 1991. In that time VW has built and expanded its state-of-the-art facility several times. Join this unique presentation by the most senior executive responsible for VW Slovakia and benefit from his extensive experience:

- assessing current production levels
- VW's growing supplier base in Slovakia
- VW's plans for production volume increases and new model introductions
- the future of the Slovak automotive sector and VW's role within it

10:15-10:45

Overcoming The Current Challenges Of Producing High Quality Cars In Romania: The Dacia Experience In The Last 12 Months



Francois Fourmont,
Chief Operating Officer,
DACIA/RENAULT



Following on from last year's presentation by Yann Burnel, International Operations Vice

President at Dacia/Renault, we have an update on the last 12 months of Dacia's progress. Join the newly appointed Chief Operating Officer of Dacia, Francois Fourmont, as he discusses his vision of:

- evaluating the current state of the Romanian market
- assessing Renault's achievements in transforming an old factory into a modern Renault production facility
- overcoming the major challenges of working in Romania
- developing and motivating staff to achieve world class quality and efficiency of production
- outlining future production plans: setting goals for market-share growth
- taking advantage of the 100 km competition exclusion zone

10:45-11:15 Morning Coffee

11:15-11:45

How To Prepare For And Find The Automotive Market Of The Future



Mike S. Hanley,
Global Automotive Leader,
ERNST & YOUNG



You know how fast paced and unpredictable the automotive industry is. With newly emerging low cost production locations and constantly changing demands of the customer it is especially important for you to learn the most successful strategies for:

- evaluating the potential of existing and upcoming automotive markets
- preparing for the challenges of a fluid automotive market
- the do's and don'ts for entering new automotive markets

11:45-12:15

Outlining Opel Polska's Plans For Increasing Production As Well As Growing And Developing Its Supplier Network



Romuald Rytwinski, Managing Director,
GENERAL MOTORS POLAND &
Plant Director, OPEL POLSKA



It is a great pleasure to welcome one of AUTOCEE's great supporters and regular speakers Romuald Rytwinski, Managing Director of General Motors Polska and Director of Opel Polska. Mr Rytwinski will update you on the company's progress with production of the Opel Astra as well as present his views of the future of the supplier network:

- assessing current production levels at Opel Polska
- predicting future market developments in Poland: forecasting production growth
- an overview of Opel's supplier localisation and local supplier management strategies
- assessing the key factors and criteria for choosing Poland as your next location: how can your company benefit from investing and growing in Poland?

12:15-13:30 Lunch for Delegates & Speakers

13:30-14:00

China – Threat Or Opportunity?

Assessing The Impact Of The Chinese Automotive Market On Your Business In Central & Eastern Europe



John Morgan,
Senior Manager,
CONTINENTAL SOUTH EAST ASIA



Are you finding yourself competing with suppliers that operate in China? Will your business have to move to China in order to gain an even greater competitive advantage?

What are the main challenges of operating in Asia? Join John Morgan, who has extensive experience of working in Central & Eastern Europe as well as in Russia, and who has recently been transferred and made responsible for Continental's business in Asia. John will give his views on:

- the potential of the Chinese automotive market
- the major players in the Chinese automotive sector: who are your potential customers and competitors?
- overcoming the challenges of setting up and operating in China
- comparative analysis of working in Eastern Europe vs China: what is different, better and worse?
- taking full advantage of local cheap labour: what are the real cost savings?
- tackling transportation and supply chain challenges
- competing in the global market: will China take away or bring new business to your operations in Central & Eastern Europe?

14:05-14:35

Assessing Slovenia As An Investment Location For The Automotive Industry



Matej Kovac,
Director, SLOVENIAN TRADE &
INVESTMENT PROMOTION AGENCY-TIPO



Dusan Busen,
Director,

AUTOMOTIVE CLUSTER OF SLOVENIA

Slovenian automotive industry has a long tradition in supplying demanding foreign markets and local manufacturers meet all supplier quality requirements for the automotive industry. The annual turnover of the Slovenian automotive supply industry is over EUR1 billion and 80% is earned on exports of goods and services to the EU. Overall, Slovenian automotive industry has around 16,500 employees. Matej Kovač will give you a full overview of Slovenia's automotive industry strengths, including: quality workforce, quality link to regional markets, quality infrastructure, quality of life, investment opportunities. Dusan Busen will present you Automotive Cluster of Slovenia and its members' common activities. You will also learn about the success of, and future plans for, Revoz Renault in Slovenia.

Dusan Busen will talk about the role of ACS in uniting Slovenian automotive suppliers. You will also hear about the success of, and future plans for, Revoz/Renault.

14:35-15:05 Afternoon Coffee

15:05-15:35

Establishing Production In Central & Eastern Europe: Assessing The Different Options Available To You



Vladimir Vesely,
General Manager, Aftermarket CZ,
TRW AUTOMOTIVE



Time and time again, our delegates tell us that some of the most interesting and valued presentations at AUTOCEE are the case study experiences from the T1 suppliers that have been operating in the region for many years. This year we have asked Vladimir Vesely to give you a detailed overview of the TRW experience in Central & Eastern Europe, focusing on both achievements and failures. Learn the do's and don'ts from the real practitioners in the region:

- the benefits of 100% ownership
- assessing the potential of greenfield projects
- should you consider a joint venture?
- examining the pros and cons of brownfield projects

15:40-16:10

Capitalising On The Highly Skilled Local Labour Force: Should You Move Your R&D To Eastern Europe?



Marek Adamiak,
Managing Director,
DELPHI POLAND



Delphi was one of the first global T1 suppliers to establish an R&D centre in Eastern Europe. The trend will no doubt continue, as most of your competitors and partners currently look at how they can use the highly educated and skilled labour force of the region. Learn from Marek Adamiak, Managing Director of Delphi in Poland, as he discusses:

- assessing the key factors behind the decision to move your R&D to Central & Eastern Europe
- assessing the quality and availability of highly skilled engineering personnel in Central & Eastern Europe
- identifying and overcoming the key challenges of running a sophisticated R&D operation in the region
- using the new location to work with your present Western European customers
- measuring savings and improvements: what results should you expect?

13:30-14:00

The Eurocar Case Study: Evaluating Current And Future Investment Options In The Ukraine



Oleg Boyarin,
General Director,
EUROCAR



Eurocar has been assembling cars in the Ukraine for several years. Benefit from Oleg Boyarin's extensive experience in, and knowledge of, the Ukrainian market and supplier base, as the Ukraine becomes a key player in the automotive industry of the region.

- assessing the Ukrainian automotive market and its future growth
- evaluating the potential of developing and working with the local supplier base
- making full use of cheap skilled labour
- production plans and timescale overview
- Dos and don'ts: the key challenges of setting up and operating in the Ukraine

14:05-14:35 Speaker & Presentation Title To Be Confirmed

14:35-15:05 Afternoon Coffee

15:05-16:10

Market Analysis Update – Poland: Assessing The Latest Sales Figures And Forecasting Future Developments To Limit Risk



Wojciech Drzewiecki,
President, AUTOMOTIVE MARKET
RESEARCH INSTITUTE – SAMAR



Join one of our most appreciated and popular speakers, who in one hour will give you a detailed analysis of Eastern Europe's largest automotive market as well as comment on his views of the future of Polish car sales.

- assessing the current state of vehicle production and sales in the region
- assessing the impact of new legislation and investment incentives on future sales
- an overview and analysis of the changes in the market over the last 12 months
- forecasting sales for the medium-to-long term

16:15-16:45 FINAL PLENARY SESSION:

How To Build A Competitive Advantage In Your Business By Embracing The KAIZEN Philosophy And Culture



**Eric Decourtye, Senior Consultant &
European Director of Sales and Marketing,
KAIZEN INSTITUTE**



**Carsten Otto, Senior Consultant & Eastern
European Manager of New Business
Development, KAIZEN INSTITUTE**



With KAIZEN being used by a number of automotive companies in Central & Eastern Europe, we felt that you would welcome a detailed overview of the concept first hand from the inventors - the KAIZEN Institute. Be inspired as you learn more about:

- working in a more demanding market
- how to identify waste in your business and remove it
- learning from successful case studies

MEDIA PARTNERS:



The AutoBusiness European Supplier Report provides a unique insight into Europe's supply base. Its coverage includes:

- Who Supplies Whom - the supply base of Europe's leading carmakers
- 200 top supplier profiles

The 582 page report is priced at £600. visit www.autobusiness.co.uk/euro for more information.



SupplierBusiness.com is a weekly and monthly research program for senior executives in the automotive supply industry. The journal tracks the developments of key issues and indicators for supplier finance, marketing, purchasing and new product development from a strategic perspective. For samples visit www.supplierbusiness.com



Ward's Communications is a world-leading provider of auto industry news, data and analysis, having served the industry's information needs for nearly 80 years. Ward's AutoWorld is a monthly magazine serving more than 68,000 automotive professionals globally. In addition, Ward's produces newsletters, reference annuals and data products such as Ward's AutoForecasts, the global auto industry's only production and sales forecasts produced in the environment of a news gathering organisation. WardsAuto.com is an online subscription service delivering virtually all the industry news, data and analysis compiled by Ward's Communications, the world's leader in automotive industry information. Ward's Communications is a Southfield, MI – based division of PRIMEDIA Business, the trade publication group of PRIMEDIA.



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Russia Focus Day, Friday 22nd October 2004

Capitalising On Current Opportunities In The Russian Automotive Industry: Choosing The Right Strategic Partners To Drive Your Business In Russia

You can be sure that Russia is on the agenda of all global OEMs and T1 suppliers. The Russian automotive sector has now become a reality, and companies are moving fast to capitalise on the opportunities offered by this new unexplored market and its solid industry infrastructure as well as strong automotive tradition. The Russia Focus Day has been specifically designed to help you establish and extend your business in Russia. Top level executives from all the key OEMs operating in the region will provide you with their views on current market conditions, detailing the pitfalls and challenges of doing business in Russia as well as focusing on their plans for expansion, production growth and future development. In just one day you will be exposed to the entire automotive sector in Russia. Just imagine how long it would normally take you to meet even just a couple of our speakers!

8:30-9:00 Coffee & Registration

9:00-9:20 Chair's Welcome Address



Jean-Francois Tremblay,
Automotive Leader,
ERNST & YOUNG RUSSIA



Jean-Francois Tremblay is an Executive Research Manager working in the Automotive & Industrial Products Group of Ernst & Young in Moscow. Jean-Francois coordinates automotive projects within FIAC's Automotive Task Force, a working group devoted to automotive issues. FIAC (Foreign Investment Advisory Council) is an organisation made up of foreign companies and the highest government officials, actively seeking to improve the investment climate in Russia. Jean-Francois' experience and knowledge of the Russian automotive sector makes him an ideal Chairman for the Russia Focus Day.

9:20-10:00

Assessing The Current Challenges And Opportunities In The Russian Automotive Sector: What Are The Key Factors That Will Influence The Growth And Profitability Of Your Company?

Delegation Of Senior Representatives, AVTOVAZ



Learn first hand the views of Russia's largest car manufacturer on the future of the automotive sector in the country. If your company is planning to establish business in Russia, then meeting and hearing from AvtoVAZ is absolutely imperative to your success. Learn more on:

- the major areas of growth in the Russian automotive sector
- local supplier base: the market needs and opportunities
- key areas of strategic development at AvtoVAZ: an overview of the new Kalina model launch

10:00-10:40

Penetrating New Markets Through The Use Of Local And International Production Growth Strategies



Vadim Shvetsov,
General Director,
SEVERSTAL-AUTO



Severstal Auto produces over 110,000 cars a year as well as thousands of automotive components. In addition, the company is part of the Severstal Group, which has recently been added to the list of the largest 100 companies in Central & Eastern Europe. Hear from

Vadim Shvetsov, General Director of Severstal Auto, as he discusses his company's achievements and plans for the future:

- taking full advantage of the highly skilled Russian labour force
- outlining the strategy behind production growth
- competing in the global marketplace: key factors for Severstal Auto's success
- developing production internationally

10:40-11:10 Morning Coffee

11:10-11:50

Outlining The Key Production And Development Plans At Avtoframos/Renault



Georges Schiellein,
Head Of External Communications,
AVTOFRAMOS/RENAULT

In 2003 Avtoframos, a joint venture between Renault and the Moscow City Government, produced 1,700 Renault Symbol cars. The company plans to stop Renault Symbol (last generation Clio) production in summer 2004 in preparation for X90 production. Avtoframos plans to produce 60,000 Renault X90 cars annually and later on to increase annual output to 120,000 cars. The production of X90 is due to start in summer 2005. Make sure you get the latest update from one of the most successful western automotive manufacturers in Russia:

- developing a strategy for increasing production and profitability
- forging new relationships with international partners
- outlining plans for new model launches and production volumes

11:50-12:30

An Update On RusPromAvto's Position And Key Areas Of Strategic Development In The Russian Automotive Market



Alexander Yushkevich,
General Director,
RUSPROMAVTO



For the first time, AUTOCEE welcomes RusPromAvto to the speaker faculty. The company is a holding conglomerate of 15 different manufacturing facilities producing cars, buses, small commercial vehicles, trucks and special equipment, with well known names such as GAZ and Russian Bus in its portfolio. Join Alexander Yushkevich, the most senior executive at RusPromAuto, as he reveals:

- an overview of current production levels and plans for the future
- developing new links with international partners
- outlining the strategy for managing local and international suppliers
- competing with the western automotive force: strategies for growing RusPromAvto's local market share

12:30-13:40 Lunch for Delegates & Speakers

STREAM A

13:40-14:10

Overcoming The Challenges Of Producing Western Quality Cars In Russia: The Ford Case Study



Murray Gilbert,
General Manager,
FORD ST PETERSBURG



Thinking of setting up in Russia? Well benefit from the experience of Murray Gilbert, who has built and is operating a very successful Ford production facility near St Petersburg. Russia is not the first foreign assignment for Murray, as he has extensive experience in Asia where he also built production facilities for Ford. Murray will provide you with his fascinating views on the differences and similarities between operating in Russia versus Asia:

- outlining the strategy behind Ford's choice and development of the production site
- maintaining the highest level of quality throughout the production facility
- managing people

14:15-14:45

The Practical Realities Of Maintaining The Highest Levels Of Quality And Productivity At Avtotor's Production Facility: How To Build Western Cars In Russia

Valery Sokolov,
Managing Director,
AVTOTOR



Following on from last year's presentation by Vladimir Sherbakov, Chairman of Avtotor, who introduced the company and explained its main activities and achievements in producing KIA and BMW cars in the free economic zone of Kaliningrad, we have asked Valery Sokolov, Managing Director of Avtotor, to give you a more detailed assessment of the following:

- developing a productive and transparent relationship with your customer: a western OEM
- key strategies for achieving top quality results
- overcoming the major infrastructure and supply chain challenges

14:45-15:15 Afternoon Coffee

STREAM B

13:40-14:10

A Detailed Overview Of GAZ's Plans And Role In The Future Of The Russian Automotive Sector



Alexei Barantsev,
General Director,
GAZ



As a complement to the presentation by Alexander Yushkevich of RusPromAuto, the holding company of GAZ, Alexei Barantsev will provide a detailed assessment of GAZ's role in the Russian automotive market and its plans for growth and development of international and local suppliers, with a specific focus on:

- current production levels
- future plans for local and international development
- growing market share in Russia: what is the future of GAZ?

14:15-14:45

Latest Update On The Russian Bus Market: Production Plans, Market Overview & Supplier Management Strategies



Sergei Zanozin,
Chairman,
RUSSIAN BUSES

Russian Buses is also part of the RusPromAuto holding company and is responsible for the production of 90% of buses for the Russian market. Don't miss this unique opportunity to learn more about one of the most lucrative sectors of the Russian automotive industry. Sergei Zanozin, Chairman of Russian Buses, will give you his views on:

- production capacity and future development plans for Russian Buses
- building strong relationships with suppliers and partners

14:45-15:15 Afternoon Coffee

15:15-15:45

Promoting Sustainable Growth In The Russian Automotive Industry: How Can The EBRD Help You Invest In Russia?



Duncan Senior,
Senior Banker,
EBRD RUSSIA



Over the ten years that the EBRD has been working in the Russian Federation, the bank has become a well established partner for the Russian authorities, foreign investors and Russian companies. The bank's local presence, through its offices in Moscow and the regions, has allowed it to accumulate specific expertise and gain the trust of its partners. Duncan Senior will share the EBRD's unique expertise in financing OEM and T1 supplier projects in Russia.

- assessing the viability of your project
- timescales and forecasts for the Russian automotive market
- growing your business in Russia

15:50-16:20

Latest Update On The Current State Of The Local Russian Supplier Base: Choosing The Right Partner To Develop Your Business In Russia



Alexander Soloviev,
Chairman,
SOK



The SOK group is the second largest OEM in Russia and the largest conglomerate of T1 suppliers in the country. If Russia is in your business plan then hearing from, and making personal contact with, Alexander Soloviev is absolutely imperative to your success. Hear Soloviev's views on:

- the benefits and challenges of working with a local partner in Russia
- key criteria for choosing a partner in order to build a successful relationship
- future production and development plans at SOK

15:15-15:45

Using Collaboration And Localisation As The Key To Driving Your Business In Russia



Alexander Ostrov,
Russia Country Director,
DELPHI CORPORATION



Following on from last year's presentation, Alexander Ostrov will give you an update on the last 12 months of Delphi's work in Russia. Delphi has been in Russia for over 11 years and is now one of the most important T1 players in the Russian market. Hear Alexander's views on:

- investing in Russia to supply local auto-producers
- the major challenges of collaborating with Russian car companies
- assessing future investment from western OEMs in Russia

15:50-16:20

Developing And Maintaining Win-Win Collaborative Relationships With Your Customers In Russia: What Does It Take To Succeed In The New Territory?



Paul Hendry,
Operations Director,
CONTINENTAL RUSSIA



Continental is one of the automotive industry pioneers in Russia, with the company starting to develop a production site in Moscow in 2002. Join Paul Hendry, Operations Director of Continental Russia, as he reveals the details, challenges and advantages of operating in Russia. Paul will focus on:

- assessing the key challenges of establishing operations in Russia
- assessing the infrastructure limitations and regulatory issues connected with establishing business in Russia
- building your business with the local OEMs: the dos and don'ts
- assessing the future of the automotive sector in Russia: what can you expect in the next 3-5 years?

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For further information on Ernst & Young's services to automotive industry please contact one of our professionals or visit our website <http://www.ey.com/us/automotive>.

FINAL PLENARY SESSION

16:20-16:50

The GM-Avtovaz Togliatti Project – Latest Update: Driving Industrial Growth And Penetrating New Markets In Collaboration With Local Partners



Pamela Smith,
Finance Director,
GM-AVTOVAZ



Pamela Smith, Finance Director of the GM-Avtovaz joint venture, is returning to AUTOCEE 2004 to give you an update on the project's progress and future plans. Don't miss this unique opportunity to hear from one of the most successful western OEMs in Russia. Pamela will focus on the following issues:

- developing a strategy that satisfies local market needs and price requirements
- working with local partners and suppliers
- bringing new affordable models to the local market

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B	Gold Package 1: Supplier Collaboration Day + Main Two Day Conference	£2058/€3210	£2258/€3522
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D	Main Two Day Conference only	£1359/€2120	£1459/€2276
E	Interactive CD Rom If You Are Attending The Conference		£299/€466
F	Interactive CD Rom If You Are Not Attending The Conference		£399/€622

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