

SpeedNews

Second Annual Aviation Industry Suppliers Conference in Europe (AISCE-2)

September 10-12, 2001

Hôtel Palladia, Toulouse, France

PROGRAM

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September 10, 2001

SEPTEMBER 10, 2001 MONDAY

6:30-10:00 pm Registration, Welcome Reception and Buffet Dinner
Hôtel Palladia - The Capitoul Room
8:15 pm Dinner for Speakers; bus will leave from Hôtel Palladia

SEPTEMBER 11, 2001 TUESDAY

7:30-9:00 am	Registration - Hôtel Palladia - Amphithéâtre Buffet Breakfast - Hôtel Palladia Restaurant, sponsored by Fairchild Fasteners	
9:00-9:10	Welcome Address and Introduction by Conference Chairman	Gilbert W. Speed Publisher, SPEEDNEWS
9:10-9:25	AIRBUS Opening Address	Ray Wilson EVP, Procurement
9:25-10:15	AIRBUS The A380 and Product Updates	Philippe Jarry VP-Product Evaluation
10:15-10:30	Coffee Break - Hall of Reception Area	
10:30-11:10	BOEING The Sonic Cruiser and Product Developments	Jacki J. Caferro Reg. Director, Product Mktg.
11:10-11:35	EMBRAER ERJ 170 and ERJ 190: 70-110 Seaters	Graciliano Campos Senior Manager, Airline Market Strategy
11:35-12:00	BOMBARDIER AEROSPACE Bombardier Jet Family	John Holding EVP, Engineering
12:00-2:00 pm	Lunch: JETBLUE AIRWAYS Successful New Airline, Old Routes and New Aircraft Raffle of Airbus models, The Capitoul Room	Tom Anderson VP, Corporate Planning & Aircraft Acquisition
2:00-2:30	FAIRCHILD DORNIER International Production and Procurement	Hans-Heinrich Peters VP, Supplier Development
2:30-2:55	BAE SYSTEMS Regional Jet Market	Nick Godwin SVP, Sales & Marketing
2:55-3:15	Afternoon Break - Hall of Reception Area	
3:15-3:45	J.P. MORGAN CHASE & CO. European Airlines and Manufacturers: A Financial Viewpoint	Chris Avery VP, Equity Search
3:45-4:20	SIROCCO AEROSPACE INTERNATIONAL Tu 204-120 & -120C with RR RB211 Engines and 60 Western Suppliers	Jules Rondepierre EVP, Sales & Marketing
4:20-4:55	ALDERMAN & CO. Industry Consolidation: What's Next?	William H. Alderman President
4:55-5:00	Review of Tuesday's and Preview of Wednesday's Program	Gilbert W. Speed
7:30-10:30	Dinner Party at Hôtel Dieu	

William H. Alderman, President • Alderman & Company



Bill Alderman is the President of Alderman & Company, a financial advisory firm, founded in March 2001, specializing in mergers/acquisitions of aerospace companies with revenues between \$5m-\$100m.

During his 11 years in aerospace finance, Mr. Alderman has completed over \$1b in mergers, acquisitions, and related transactions. From 1990 through 1995, he was with GECAS, where his achievements in transaction structuring were recognized in 1994 by his induction into GE Capital's Circle of Excellence.

From 1996 to 1999, he was Senior VP of Aviation Sales Company, responsible for its acquisition activities; then, in October 1999, he left Aviation Sales Company to join the investment banking firm of Fieldstone, where he served as Managing Director of the its aerospace mergers and acquisitions practice.

He earned his MBA from the JL Kellogg Graduate School of Management of Northwestern University in Chicago, and has an undergraduate degree in History from Kenyon College in Ohio. He is an FAA licensed pilot and a member of the Wings Club of New York.

Tom Anderson, VP-Corporate Planning & Aircraft Programs • JetBlue Airways



Tom Anderson is responsible for the airline's relationship with Airbus, IAE and other major business partners, and the airline's long-term planning initiatives.

Prior to joining JetBlue, he was a Sales Director for the Boeing Commercial Airplane Group.

Mr. Anderson holds an undergraduate degree in Business from the University of Wisconsin - Madison, and a Masters degree from Northwestern University.

He is a licensed commercial glider pilot, and has his US Airframe and Powerplant Mechanics license.

Chris Avery, VP-Equity Research • JPMorgan Chase & Co.



Chris Avery is Head of the European Airlines & Aerospace team.

Mr. Avery joined JPMorgan in mid-1999 after six years covering a similar portfolio at Paribas. Prior to that, he spent three years at Smith Newcourt. He has been ranked first by Euromoney for aviation, second in Exel for UK aerospace, and third in European Transport (by Finance Directors).

Mr. Avery graduated in Business Studies from Portsmouth University and is a Chartered Accountant.

Christophe Bédier, Partner • McKinsey & Company Paris



During his 11 years at McKinsey and Company, Christophe Bédier worked extensively for large technology and industrial groups in France, Europe and the United States. He is an active member of their Aerospace and High Technology practices.

Prior to joining McKinsey, Mr. Bédier worked for six years with Thomson-CSF.

He is a graduate engineer in Electronics (with a major in Solid State Physics) and holds an MBA from INSEAD.

Jacqueline J. Caferro, Regional Director-Product Marketing • Boeing



Jacki Caferro is currently based in Munich, Germany. She has been with Boeing for nearly 14 years, beginning her career as an engineer in detail design.

Her primary years were spent working on the 777 in preliminary design and product development. In addition, she managed a Research and Development organization responsible for the development of rulebase design in CAD.

She has a BS in Mechanical Engineering from Gonzaga University in Spokane, WA.

Graciliano Campos, Airline Market Strategy Senior Manager • Embraer



Graciliano Campos joined Embraer in 1981 as a Sales Engineer and subsequently worked as a Landing Gear Systems Engineering Specialist on the AMX Program and Landing Gear System Development Engineering Coordinator for all Embraer programs.

From 1994 to 1999, he worked at the systems engineering company COMPSIS, beginning as Marketing Manager and progressing to Commercial Director, and then rejoined Embraer in 1999 as Market Strategy Senior Manager for the Airline Market.

He holds a degree in Mechanical Engineering from the University of Brasilia-DF, and an MBA from the Instituto Nacional de Pós Graduação.

Guy Dallery • General Manager-Market Research & Forecasting • Airbus



Guy Dallery has spent more than 25 years in civil aviation-related activities. He joined the Airbus marketing division after seven years with the French Transport Ministry as Aeronautical Industry Analyst, and with Pointe-a-Pitre Airport in Guadeloupe as Assistant to the Airport Manager.

He spent eight years in Airbus sales activities in Latin America and Europe, and returned to market research and planning activities in 1986, developing the tools and methodology for the Airbus Global Market Forecast, and actively participating in the launch of the A320 and A330/A340 families.

In 1995, he joined the Forecasting & Strategic Planning Division, where he manages the Market Research & Forecasting Department and focuses on future product development, particularly the A380.

Bill Evancho, Senior Vice President • Aviation Equipment, Inc.



Bill Evancho is responsible for developing the Aerospace Fiber-Metal Laminate business at Aviation Equipment, Inc., focusing principally on its exclusive patented products ARALL[®] and Glare[®].

Bill has over 32 years of experience in R&D and general management. He graduated from the University of Pittsburgh in 1969 with a degree in metallurgical and materials engineering, and joined Alcoa as a research engineer at Alcoa Research Laboratories. He held various positions in technology management until 1982, when he became VP of Alcoa Steamship Company and later President in 1985.

In 1988, he was assigned responsibility for developing a new venture for Alcoa based on proprietary fiber-metal laminate technology for aerospace application, and in 1991, he negotiated and directed the formation of Structural Laminates Company, a joint venture of Alcoa and Akzo Nobel.

Bill restructured Structural Laminates Company in 1997 to become a licensor of its proprietary technology, and joined Aviation Equipment after it acquired licensed rights to ARALL[®] and Glare[®].

Nick Godwin, VP-Marketing • BAE SYSTEMS Regional Aircraft



Nick Godwin has been involved with the regional airline industry for over 20 years since graduating from Southampton University in 1980.

He was initiated in aircraft performance and economics on the BAC1-11 and later the BAe 146. In 1981, he helped establish a new sales and technical sales organization for the J31 program, and then moved to British Aerospace, Inc., in Washington, DC, where he held various sales, marketing and program management positions. Following the launch of the J41, he returned to Prestwick to head Marketing Services.

He participated in the creation of AI(R), and was VP-Marketing of that company between 1996 and 1998. After the dissolution of AI(R) in 1998, he became VP-Marketing for British Aerospace Regional Aircraft, now BAE SYSTEMS Regional Aircraft.

Ed Greenslet, President • ESG Aviation Services



In 1988, after 23 years as a security analyst following the airline and aerospace industries for several New York brokerage firms, Ed Greenslet set up ESG Aviation Services, which provides consulting services to airlines, manufacturers, leasing companies, and institutional investor clients.

ESG publishes the *Airline Monitor*, which provides statistics relating to airline fleet trends, developments, and operations. In 1989, he established Airline Capital Associates with Donald Schenk.

He holds a BS in Business from Denver University, and did his Economics graduate studies at Stanford University. He is a Chartered Financial Analyst and a member of the AIAA and the Society of Aerospace Analysts.

Mark Heuchan, Asst. Director-Information, Analysis & Forecasting • IATA



Mark Heuchan runs IATA's Information, Analysis and Forecasting Department, based in London. His department works very closely with IATA's member airlines and other industry players to produce such publications as World Air Transport Statistics (WATS), IATA's Freight and Passenger Forecasts, and the Air Cargo Annual. He also manages and promotes the International CASS Statistics programme.

Mr. Heuchan had 11 year's experience in British Airways before joining IATA, working primarily in the Revenue Management and Cargo fields, located at various times in London, New York and Chicago. He is keenly aware of the issues in the industry, and the value of information to the decision maker.

He holds an MS in Operational Research and an MBA.

John P. Holding, Executive Vice President • Bombardier Aerospace



John Holding joined British Aerospace (then English Electric Aviation) in 1962 as a student apprentice, which he completed in 1967. He was later involved in the design and development of powered flight control systems for the Jaguar and Tornado Aircraft.

He then joined Canadair in 1979 as a Senior Staff Specialist, and has since been involved in the development of all Canadair Aircraft Programs, including the Challenger, Regional Jet and CL-215T Waterbomber, as a Manager, then as a Director. In 1990, he was appointed VP of Engineering and then added responsibilities of Flight Operations and Quality Assurance. In October 1993, he was appointed EVP Engineering for Bombardier Aerospace Group North America, and in 1996, EVP, Engineering and Product Development for Bombardier Aerospace, which is his present position.

Mr. Holding holds a MS in Mechanical Engineering from Manchester University, and a doctorate honoris causa from Montréal University.

Philippe Jarry, Vice President-Market Development • Airbus



Philippe Jarry began his career in commercial aerospace in 1976 when he joined the Snecma Commercial Division of GE-Snecma engine programs. He spent three years as a Sales Manager for CFM International, promoting DC-8-70s and 737-300s in Europe.

In 1981, he joined Airbus as a Senior Airline Marketing Executive, and in 1984 became Sales Area Director, conducting sales campaigns in Europe, including launches of the A330, A340, A321 and A319. He was appointed VP Marketing in 1994, and his responsibilities included product marketing, airline marketing, market research and forecast.

In 1996, he joined the A3XX Division as VP Market Development, a position he held until the launch of the A380 that was achieved in December 2000. At that time, he joined the newly found Product & Service Policy Group as VP Product Evaluation.

Mr. Jarry has a degree in International Economics from Georgetown University and also holds degrees in Law and Economics from the Paris University.

Billie Jones, Manager-Market Planning • Pratt & Whitney



Billie Jones began his career at Pratt & Whitney in 1965. After an initial career in computer systems and engineering management, he moved into the marketing department as an airline analyst. When International Aero Engines was formed in 1984, he was seconded to IAE as Director of Marketing Operations with responsibilities for forecasting, product marketing, airline studies, and customer relations. He assumed his current position in 1993.

Mr. Jones is a graduate of North Carolina State University with a BS in Applied Mathematics. After graduate study in Political Science, he received his MBA from the University of Connecticut with specialization in marketing and finance.

He has chaired the large commercial aircraft forecasting panels for both the Transportation Research Board and FEAMA.

Carlo Logli, VP-Sales & Marketing • ATR



After starting his professional career in Rome as Team Manager with Procter & Gamble, Carlo Logli moved to Toulouse in 1989 to become a Systems Engineer in the Hermes Spacecraft Project for the ESA (European Space Agency).

In 1991, he joined ATR (Avions de Transport Regional) as Sales Manager in Italy and Eastern Europe. He was then promoted in 1996 to Deputy Vice President Sales for AI(R) in charge of sales and marketing of Jetstream, ATR and AVRO airplanes.

In 1998, he re-joined ATR as Vice President Sales Europe and Middle East, and since June 2001, has been Vice President Sales and Marketing.

Mr. Logli graduated from the University of Rome in 1986 with a degree in Aeronautical Engineering. In 1994, he obtained a post-graduate degree in "Gestion d'Entreprise" from the French IAE (Institut d'Administration des Entreprises).

Tim Meskill, Director of Market Analysis • The Boeing Company



Tim Meskill began his career at Boeing in 1977 as an airline financial analyst after working as a transportation industry analyst with the Civil Aeronautics Board. Since joining Boeing, he has been assigned as an airline financial analyst, airline account manager, functional representative to the Quality Improvement Center, manager of leased airplane coordination, and manager of industry communications.

Since January 1994, he has been Editor of the *Current Market Outlook*, which forecasts the demand for world air travel and the number of aircraft required to meet projected growth. He is also responsible for providing data, forecasts and research studies on the commercial air transportation market.

Robert Nuttall, Head of Marketing • Rolls-Royce



Robert Nuttall joined Rolls-Royce in 1979 after completing a first degree in Physics. After a series of initial positions in Rolls-Royce engineering, working mainly on the RB211 family of engines, he moved into Marketing.

Following a progression of increasingly responsible positions, he was seconded to IAE (International Aero Engines) as Vice President of Company Communications. Upon returning to the UK in 1995, he completed his MBA and became closely involved with the launch of the Trent 500 for the Airbus A340, and subsequently the Trent 900 for the Airbus A380.

In his current role, he has full marketing responsibility for all Trent engines powering Airbus aircraft.

Hans-Heinrich Peters, VP-Supplier Development • Fairchild Dornier



Hans-H. Peters joined Fairchild Dornier in December 2000 as VP Supplier Development, and is based in Oberfaffenhofen.

He began his aviation career as an apprentice at Hamburger Flugzeugbau in 1971, and he now has over 25 years of professional experience in the aeronautic industry and aircraft maintenance field, including 12 years in international management positions with Airbus in customer and product support, Rohr Hamburg as Managing Director where he established the facility and initiated production, and EADS Airbus as Head of Procurement Equipment and Systems.

His other experiences include being a C-160 flight engineer for the German Air Force.

Jules Rondepierre, EVP-Sales & Marketing • Sirocco Aerospace Intl.



Following a tour of duty in the US Navy, Jules Rondepierre began his aviation career in 1963 as a staff Industrial Designer at Atlantic Aviation, designing custom aircraft interiors for corporate/private jets.

From 1972 to 1981, he headed the Corporate Design operations for TWA, leaving to open his own design and marketing consulting business with offices in New York and Los Angeles. From 1983 through 1987, he was a founding officer and VP Marketing for Phoenix-based McClain Airlines.

For the next 10 years, he worked as Director and Senior Director of Sales for Airbus Industrie of North America. He joined Brazil-based Embraer in 1997 as Senior VP Sales Worldwide, remaining for three years, during which time nearly 1,000 firm and option Embraer regional jets were sold.

He joined Sirocco Aerospace early in 2001 as Executive Vice President Sales and Marketing, and is now based in London.

Eric B. Schoenholz, Senior VP-Marketing & Sales • Engine Alliance

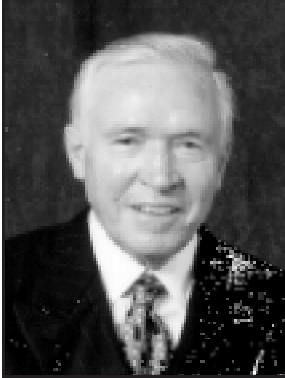


Eric B. Schoenholz was named Senior VP, Marketing and Sales of the Engine Alliance in October 2000. He is responsible for leading the overall marketing and sales activities for the GP7000 that will be used to power the new generation of very large aircraft, including the A380.

Before joining the Engine Alliance, Mr. Schoenholz was VP of the Pratt & Whitney Toulouse Office, where he was responsible for the overall relationship between Pratt & Whitney and Airbus. Prior to this assignment, he lead the Marketing and Sales activities of IAE for five years where his team was very successful in selling the V2500 engine for the Airbus A320 family of aircraft. The remainder of his 30 plus years of experience at Pratt & Whitney included various assignments in Sales, Marketing, and Engineering.

Eric holds a BS in Mechanical Engineering from Lehigh University, an MS in Operations Research (Computer Science) from Rensselaer Polytechnic Institute, and MBA from the University of Connecticut.

Gilbert W. Speed • Conference Chairman



Gilbert Speed has spent almost 50 years in the aviation industry. He started as a student apprentice in 1952 at The Bristol Aeroplane Company (now part of BAE SYSTEMS). In 1957 he moved to the US and worked as a Development Engineer on new aircraft for Eastern Airlines, working on the DC-8 and Lockheed Electra. In 1959, he joined Pan Am as a Structures Engineer, and later an Aeronautical Engineer. At Pan Am he worked on the specifications for the 727, 707 Freighter, Concorde, and Dassault Fanjet Falcon.

He left Pan Am in 1965 to become VP Marketing for Tridair Industries in California. In 1968, he founded Transequip (now part of Telair International), which manufactured composite panels, cargo and baggage containers and cargo systems; he sold his interests in 1978.

Mr. Speed founded SPEEDNEWS in 1979, and in 1991, launched SPEEDNEWS DEFENSE BIWEEKLY. In 1987, he started the first conference dedicated to briefing suppliers.

John Walsh, President • Walsh Aviation



John Walsh, with more than 25 years experience in aerospace, founded Walsh Aviation, a consulting service that specializes in forecasting the commercial and military aviation markets, and identifying new business opportunities in the aerospace industry.

He is frequently quoted in numerous aerospace reports by several media outlets including the Wall Street Journal, Nightly Business Report, USA Today, World Airline News, BBC Worldwide News Hour, Air Transport World, and Aviation Week & Space Technology. He maintains a focus on the cyclical nature of the industry to provide his clients with an “early warning” or “wake-up call” by identifying the major turning points in the marketplace.

Mr. Walsh was formerly Director of Market Research for UNC, Inc., and Director of Market Planning and Corporate Relations for Rohr. He is a graduate of Manhattan College, Columbia University and UCLA, and has MS in Civil Engineering and an MBA.

Ray Wilson, EVP-Procurement • Airbus



Ray Wilson was appointed Executive Vice President of Procurement at Airbus in June 2000.

Mr. Wilson’s industrial training was with Ferranti, Scotland, which he left in 1967 to join the Westland Group in Yeovil. He held a number of positions including Production Engineering Manager, Program Director and ultimately Operations Director as member of the Board of Westland Helicopters.

During his Westland career, he was involved with Anglo-French Helicopters, Puma, Gazelle and Lynx in the 1970s and the Anglo-Italian EH101. He also participated in collaborative projects with Sikorsky and McDonnell Douglas, and third-party manufacturing contracts with Saab.

In February 1991, Mr. Wilson joined British Aerospace as Operations Director within its Airbus Business Unit. A year later he was appointed to the Board of the newly formed British Aerospace Airbus, continuing as Operations Director. In 1995, his role was broadened to include Engineering and Personnel functions. In June 1998, he was appointed Managing Director and became a member of Airbus Executive Board.

Kevin Wright, VP-Aerospace Solutions • SITA Global Enterprise



Kevin Wright was appointed to his current position in January 2001. He is responsible for supporting SITA’s business strategy within the emerging and rapidly growing aerospace sector, increasing market share and customer satisfaction and achieving the sector’s new business and revenue objectives. Mr. Wright will lead the major account teams, Boeing and Airbus, and develop new and established accounts in the global aerospace sector.

Before joining SITA, he spent two years at Crane Aerospace where he held the position of Vice President, Group Marketing. Prior to this, he worked for four years at Hydro-Aire Inc and held various management positions including Vice President, Sales and Marketing; Director, Electronics Manufacturing and Director, Engineering. He has also worked with Vickers Inc (now Eaton Aerospace) and Lucas Aerospace Inc (now TRW).

A British national, Mr. Wright holds an Honours degree in Electrical and Electronics Engineering from Nottingham University. He is based in Los Angeles.

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SEPTEMBER 12, 2001, WEDNESDAY

- 7:00-8:00 am Buffet Breakfast - Hôtel Palladia Restaurant, sponsored by **Fairchild Fasteners**
- 8:00-10:00 Aircraft Delivery and Retirement Forecasts for 20 years
ESG AVIATION SERVICES - **Edmund S. Greenslet**, President
BOEING - **Tim Meskill**, Project Director, Current Market Outlook
PRATT & WHITNEY - **Billie Jones**, Manager, Market Planning
WALSH AVIATION - **John F. Walsh**, President
- 10:00-10:30 Forecast Discussion and Questions moderated by **Edmund S. Greenslet**
- 10:30-10:45 Coffee Break - Hall of Reception Area
- 10:45-11:15 INTERNATIONAL AIR TRANSPORT ASSOCIATION (IATA)
Airline Industry Outlook **Mark Heuchan**
Asst. Director, Information,
Analysis & Forecasting
- 11:15- 12:00 WALSH AVIATION **John F. Walsh**
Regional and Business Jet Aircraft Forecast President
- 12:00-2:00 pm Lunch: ESG AVIATION SERVICES **Edmund S. Greenslet**
What does This Recession do to the Aircraft Market? President
The Capitoul Room
- 2:00-2:30 ROLLS-ROYCE **Robert Nuttall**
The Trent 900 Head of Marketing
- 2:30-2:55 GE-P&W ENGINE ALLIANCE **Eric Schoenholz**
The 81,500 lb. Thrust GP7200 VP, Marketing and Sales
- 2:55-3:20 ATR **Carlo Logli**
Turboprop Family VP-Sales & Marketing
- 3:20-3:35 Afternoon Break - Hall of Reception Area
- 3:35-4:00 MCKINSEY & COMPANY PARIS **Christophe Bédier**
The Changing European Aircraft Industry Partner
- 4:00-4:25 AVIATION EQUIPMENT, INC **Bill Evancho**
GLARE ®: New Material for a New Airplane SVP
- 4:25-4:50 SITA GLOBAL ENTERPRISE **Kevin Wright**
Integrating Communications and eBusiness-
Enabling a Global Strategy VP, Aerospace Solutions
- 4:55-5:00 Wrap-up **Gilbert W. Speed**
- 5:00-6:00 Farewell Reception - The Capitoul Room; sponsored by **GE Capital Aviation Services**
Boeing 777-300 airplane model and a **Breitling** watch will be raffled (must be present to win).

SEPTEMBER 13, THURSDAY

- 9:00-11:00 Visit to A380 Mockup and Airbus Final Assembly Facility