

# SpeedNews

Third Annual Aviation Industry Suppliers Conference in Europe (AISCE-3)  
September 23-25, 2002 • Hôtel Palladia • Toulouse, France

## PROGRAM

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### SEPTEMBER 23, 2002 MONDAY

6:30-10:00 pm Registration, Welcome Reception – Hôtel Palladia Patio; co-sponsored by **ATR** and **SpeedNews, Inc.**  
8:00 pm Dinner for Speakers; sponsored by **Airbus**, bus will leave from Hôtel Palladia

### SEPTEMBER 24, 2002 TUESDAY

7:30-9:00 am Registration - Hôtel Palladia - Amphithéâtre  
Buffet Breakfast - Hôtel Palladia Restaurant, sponsorship available

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  
A380 Program Update

**Colin Stuart**  
VP-Marketing

*(10:00- 3:30 pm: Spouse/Companion Outing – Guided Walking Tour of Old Toulouse and lunch at Les Jardins De L'Opera; sign up necessary)*

10:15-10:30 Coffee Break - Hall of Hotel Reception Area

10:30-11:10 BOEING  
The Sonic Cruiser and Product Developments

**Steve Ford**  
Regional Director  
Product Marketing

11:10-11:35 BOMBARDIER AEROSPACE  
Bombardier Jet Family

**Greg B. Mutch**  
Director of Airline Analysis

11:35-12:00 EMBRAER  
Products and Market Trends Update

**Orlando Neto**  
Dir.-Market Intelligence

12:00-2:00 pm Lunch: FEDERAL EXPRESS  
The A380 Freighter  
The Capitoul Room; wine sponsored by **EADS**

**David Sutton**  
General Manager-Aircraft  
Acquisitions & Sales

2:00-2:30 ATR  
Turboprop Family

**Carlo Logli**  
VP-Marketing & Sales

2:30-2:55 UNIVERSITY OF THE WEST OF ENGLAND  
The Rise and Fall of Fairchild Dornier

**Prof. Philip Lawrence**  
Dir.-Aerospace Research Centre

2:55-3:15 Afternoon Break - Hall of Reception Area

3:15-3:45 COMMERZBANK SECURITIES  
The Airlines: A Financial Viewpoint

**Chris Tarry**  
Global Airline Analyst

3:45-4:20 JPMORGAN  
European Airlines and Manufacturers: A Financial Viewpoint

**Chris Avery**  
VP-Equity Research

4:20-4:55 ALDERMAN & COMPANY  
Industry Consolidation: Review and Outlook

**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 Fondation Bemberg; wine sponsored by **EADS**

**Ray Wilson, EVP-Procurement • Airbus**



Ray Wilson was appointed EVP of Procurement at Airbus in June 2000. His 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 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.

**Colin Stuart, Vice President-Marketing • Airbus**



Colin Stuart was appointed VP-Marketing of Airbus in May 1996. His responsibilities include managing both the development and implementation of customer/product marketing activities and related marketing support services for the complete range of Airbus commercial products.

He studied under the British Aerospace undergraduate apprenticeship scheme, before obtaining a degree in Aeronautical Engineering from Bath University in 1966.

Following university, Mr. Stuart began his professional career with British Aerospace as a marketing analyst on a number of programs, including the BAC 1-11, VC-10 and Concorde.

After spending 13 years in various sales engineering positions, culminating as a Sales Project Manager for the Concorde, he joined the technical marketing department at Airbus Industrie in 1979. In 1986, he was promoted to General Manager, Product Marketing, responsible for technical marketing activities worldwide.

**Stephen D. Ford, Regional Director Product Marketing • Boeing**



Steve Ford joined Product Marketing as Regional Director in 1992. His responsibilities include assisting customers in their technical evaluation and analysis of the Boeing fleet. He provides market analysis and customer perspective for internal Boeing Product Development activity, plus input and direction for development of Boeing Product Marketing strategies and promotional materials.

His prior Boeing assignments include two years in Management Control Systems Audit at the Corporate level, five years in 737/757 Product Development aerodynamic configuration development and performance analysis, eight years in 757 aerodynamic configuration development and certification.

He holds a Bachelor of Science degree with Honors in Aerospace Engineering from Iowa State University, and has done graduate work at the University of Washington in Engineering and Seattle University in Business.

**Barry MacKinnon, VP-Marketing & Airline Analysis • Bombardier**



Barry MacKinnon was appointed to his current position in Bombardier Aerospace Regional Aircraft in April 2002. Previously, he was Director of Program Strategy in Aircraft Programs where his group was tasked with market research, forecasting and strategic planning. Prior to assuming this role, he was Director of Airline Analysis for the Americas for Bombardier. He originally joined Boeing deHavilland as airline analyst in 1986 and then Canadair's Regional Jet Division in 1991. He has been with Bombardier's Regional Aircraft division since its inception in 1992.

Mr. MacKinnon is a member of the IATA International Industry Working Group for airport and airplane compatibility and is Vice Chair of the Toronto Board of Trade Air Services Committee. He was elected to the RAA Associate Member Council in 2001.

He is a graduate of Dalhousie University and a post-graduate of Loughborough University, U.K., where he studied Airport Planning and Management.

**Orlando Neto, Director-Market Intelligence • Embraer**



Orlando Neto began his career at Pratt & Whitney Canada as a trainee engineer, and later moved on to Embraer as a Planning Engineer.

Since his first management assignment in 1990, he has managed several areas including Program's Planning and Control, Commercial and new Business Proposals, and Information Systems Development.

After Embraer's privatization in December 1994, he was named Corporate Planning Senior Manager, and is currently Director of Market Intelligence.

Mr. Neto graduated from ITA-Aeronautical Institute of Technology in Mechanical-Aeronautical Engineering in 1983, and received an MBA from University of Sao Paulo in 1998.

**David Sutton, Assistant GM-Aircraft Acquisitions & Sales • FedEx**



After a 6-year career in commercial banking in Jacksonville, FL, with what is now Wachovia Bank, David Sutton joined FedEx where he has held a number of management positions in corporate training and fleet development, and has been instrumental in developing the FedEx fleet from the original 32 Falcon jets to almost 700 aircraft today. His most recent project is leading the development of the A380 Freighter for FedEx.

Mr. Sutton was born in Canada. He has a Bachelor's Degree in English Literature from University of the South in Sewanee, TN and an MBA from University of Florida. He also attended Emory University Law School, after which he spent six years of active duty as US Naval aviator. He was combat pilot in Southeast Asia, and is a Captain in the Naval Reserves.

He is a charter member of the International Society of Transport Aircraft Trading, serving as trustee of the ISTAT Foundation and a member of the Royal Aeronautical Society.

**Carlo Logli, VP-Marketing & Sales • 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).

**Philip Lawrence, Director • Aerospace Research Center, UWE**



From 1999-2002, Philip Lawrence was Professor of Aerospace Strategy at Toulouse Business School, where he helped to develop a new Aerospace MBA program. Since 1990, he has also been a visiting professor at Boston University, and he also runs his own aerospace consultancy business as an acknowledged expert on the aerospace and defense industries.

He has worked as an advisor and consultant to AECMA, Airbus, BAE SYSTEMS, DaimlerChrysler Aerospace, EADS and the EU. He is a member of the UK DTI/MOD National Panel for Defence and Aerospace Systems and JAA Human Factors Steering Group.

Professor Lawrence has an international reputation for his research on defence and aerospace. He has published seven books, including his latest, *Aerospace Strategic Trade*, and more than twenty major articles in top academic journals.

He is a Fellow of the Royal Aeronautical Society; the Royal Society of Arts and the NATO Atlantic Council.

**Chris Tarry, Global Airline Analyst • Commerzbank Securities**



Chris Tarry joined Commerzbank in May 1999 after working outside "the City" for a number of years. He became an engineering analyst in 1984, and was UK's leading aerospace analyst. He began following the airline sector in 1986.

He worked at Between Dresdner Kleinwort Benson in 1988-1989 when he was regularly ranked in the top three European transport analysts. He led a number of major international share issues, including that of Lufthansa - the world's largest airline privatization issue.

Mr. Tarry has undergraduate and postgraduate degrees in economics and is also currently undertaking part-time research on a PhD thesis. He is a Fellow of the Royal Aeronautical Society; a member of the Chartered Institute of Logistics and Transport; a member of the Securities Institute; a visiting lecturer at Ashridge Management College, Cranfield and City University; and an Associate of the Guild of Air Pilots and Air Navigators. He also holds a private pilot's licence.

**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 Extel 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.

**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 10+ years in aerospace finance, he has completed over \$1b in mergers, acquisitions, and related transactions. In 1990-'95, he was with GECAS, where his achievements were recognized in 1994 by his induction into GE Capital's Circle of Excellence.

In 1996-'99, he was SVP of Aviation Sales Company, responsible for acquisition activities; he left Aviation Sales Company in October 1999 to join the investment banking firm of Fieldstone as Managing Director of aerospace mergers and acquisitions.

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.

**Guy Dallery, Senior Manager-Airline Demand Forecast • Airbus**



Guy Dallery has spent over 30 years in aviation-related operations and business. He joined the Airbus Marketing Division in 1978 after spending seven years in the French CAA as Aeronautical Industry Analyst, and as Assistant to the Airport Manager at Pointe-a-Pitre Airport in Guadeloupe.

He then spent eight years in Airbus sales in Latin America and Europe and returned to Market Research and Planning activities in 1986, developing the *Airbus Global Market Forecast* tools and methodology. He actively participated to the launch of all Airbus single-aisle and widebody fly-by-wire products.

In his current position, he focuses on future civil product development opportunities illustrated recently by the successful launch of the A380.

**Randolph S. Baseler, VP-Marketing • Boeing**



Randy Baseler was named VP of Marketing for BCAG in November 1998. He leads a team responsible for marketing Boeing's entire family of civil airplane products and services.

Prior to this position, Baseler was Director of Marketing for the Airline Profitability Analysis organization, to which he was named in October 1994.

He also served as Senior Manager for the Renton Division Marketing Management organization for 737s and 757s; Manager of the Cargo Market Development organization; and Product Strategy Manager for the 747, 767 and 767X (777) airplane programs. He began as an analyst in the Cargo Market Development organization within BCAG's Sales & Marketing organization. His experience includes more than 18 months in European Sales.

Mr. Baseler has a Bachelor's degree in Business from Central Washington State University, and a Master's degree in Business Administration from Washington State University.

**Chris Marshall, Head of Market Assessment • Rolls-Royce**



Chris Marshall began his career with Rolls-Royce in 1986 as a graduate engineer following a degree in Mathematics at Manchester University. He moved quickly into the Marketing area working as an analyst covering the Asian airlines.

In 1993 he completed his MBA at Nottingham University. His responsibilities have included short-term production planning, airline fleet planning, economic analysis and long-term forecasting.

Since 1995, he has headed up the Market Research area for the airlines sector, and now has the accountability for all civil market assessment activity.

**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.

**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 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.

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



Mark Heuchan works in IATA's Aviation, Information and Research Department, based in London, which 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 promotes the International CASS Statistics program.

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.

He has recently authored IATA's Special Interim Edition 2001-2005 Passenger Forecast, and will discuss this in his presentation.

**Heiner Wilkens, Sr. VP & General Manager-Europe • Boeing**



Heiner Wilkens was appointed to his current position in August 2001. Based at Boeing's Headquarters in Brussels, he is responsible for developing the growth of Boeing Commercial Airplanes in Europe, strengthening and reshaping its market position within the region.

He joined Boeing from Cargolux Airlines International S.A. of Luxembourg where he had been President and Chief Executive Officer since 1995. In 1994, he served as Senior Vice President Europe, the Middle East and Africa for Pratt & Whitney, and prior to that, he held a number of executive positions at Deutsche Lufthansa AG, including Senior Vice President Purchasing and Material where he was responsible for the purchase of new aircraft and the sale of more than 130 used aircraft. He also served as Chairman of Lufthansa Leasing KG.

Mr. Wilkens graduated in Economics from Hamburg University and has attended the program for senior executives at the MIT's Sloan School.

**Nicholas Pastushan, VP-Portfolio Management • GECAS**



In his present position, Nick Pastushan is responsible for forecasting and analyzing industry trends and economic factors affecting the GECAS portfolio as well as the general economics of the commercial aviation industry. As portfolio manager, he is GECAS' internal expert on aircraft valuation and value forecasting. He has attained the level of Six Sigma Master Black Belt, and leads business-wide quality and process improvement projects.

Pastushan joined GECAS in 1999 after holding senior analyst and risk modeling positions in risk management at IBM Credit Corporation, Franchise Capital Services and Phoenixcor Inc. He started his career as a risk analyst at Dun & Bradstreet.

Pastushan holds a bachelor's degree from The Rochester Institute of Technology in Rochester, NY.

**Stan Kaplan, President • ROM Associates**



Stan Kaplan has been President of ROM Associates, Inc. since 1993. ROM Associates provides consulting in Strategic Planning and Market Research and publishes the *Airline Traffic Monthly*.

Prior to establishing ROM Associates with his colleagues, Mr. Kaplan spent 32 years at Pratt & Whitney in a variety of management positions in Strategic Planning, Marketing and Engineering. His background includes sales forecasting, market development, competitive analysis, product assessment, aerodynamics, preliminary aircraft design and test engineering.

Mr. Kaplan started his aviation career with the U.S. Marine Corps. He is a graduate of Tri State University with a Bachelor's degree in Aeronautical Engineering and has an MBA from Western New England College.

**Dr. David Pritchard, President • Pravco**



Dave Pritchard is the President of Pravco, a global trade services consulting firm, founded in 2002, which specializes in global trade services to gain market access for selling product and sourcing low-cost material/components. Dr. Pritchard's has expertise in aerospace marketing and product introduction into the regions of Europe, Russia/CIS, China and Asia.

Before starting his consulting firm, Dr. Pritchard's career in the aerospace industry spanned over 20 years with Gemcor, holding various positions within the company.

Dr. Pritchard has worked with the Presidential Commission on the Future of US Aerospace Industry and Presidential Commission on Offsets in International Trade. He also has supplied briefings to the Office of Aerospace, ITA, U.S. Department of Commerce, on Russian Commercial Aircraft Manufacturing and European Commercial Aircraft Production Processes.

He earned his Ph.D. in Intl. Trade from the State University of New York at Buffalo.

**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 leads the major account teams, Boeing and Airbus, and develops 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.

**René Parent, Business Development Manager • Invest Québec**



René Parent is based at the Invest Québec office in Paris, and has been instrumental in bringing major investment projects to Québec, including the Bell Helicopter Textron assembly facility, and the Messier-Dowty landing gear machining plant in Mirabel.

He has also coordinated many other foreign investments into the province by Rolls-Royce, Macaer Systems, Thales Avionics, Mecachrome Machining, Turbomeca and Techspace Aero.

He holds a Bachelor's degree in Physics and a Master's degree in Education.

**Gilbert W. Speed • Conference Chairman**



Gilbert Speed has spent about 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 Intl.), which manufactures composite panels, cargo and baggage containers and cargo systems. He sold his interest in 1978.

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

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## PROGRAM

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### SEPTEMBER 25, 2002, WEDNESDAY

7:00-8:00 am	Buffet Breakfast - Hôtel Palladia Restaurant, sponsorship available	
8:00-9:30	AIRCRAFT DELIVERY AND RETIREMENT FORECASTS - Session One Moderated by <b>Chris Avery</b> , VP-Equity Research, JPMorgan AIRBUS - <b>Guy Dallery</b> , Senior Manager, Airline Demand Forecast BOEING - <b>Randy Baseler</b> , VP-Marketing ROLLS-ROYCE - <b>Chris Marshall</b> , Head of Market Assessment	
9:30- 9:45	Coffee Break - Hall of Hotel Reception Area	
9:45-10:45	AIRCRAFT DELIVERY AND RETIREMENT FORECASTS - Session Two Moderated by <b>Chris Avery</b> , VP-Equity Research, JPMorgan PRATT & WHITNEY - <b>Billie Jones</b> , Manager, Market Planning WALSH AVIATION - <b>John F. Walsh</b> , President	
10:45- 11:15	JPMORGAN Forecast Discussion & Questions	<b>Chris Avery</b> VP-Equity Research
11:15-12:00	INTL. AIR TRANSPORT ASSOCIATION (IATA) World Airline Industry Outlook	<b>Mark Heuchan</b> Asst. Director, Information, Analysis & Forecasting
12:00-2:00 pm	Lunch: BOEING Integration into the European Aerospace Community The Capitoul Room; wine sponsored by <b>Boeing</b>	<b>Heiner Wilkens</b> Sr. VP & General Manager Europe
2:00-2:40	WALSH AVIATION Regional and Business Jet Aircraft Forecast	<b>John F. Walsh</b> President
2:40-3:20	GE CAPITAL AVIATION SERVICES The Aircraft Lessors	<b>Nicholas Pastushan</b> VP-Portfolio Management
3:20-3:35	Afternoon Break - Hall of Reception Area	
3:35-4:00	ROM ASSOCIATES Air Cargo Outlook	<b>Stan Kaplan</b> President
4:00-4:25	PRAVCO Russia, A Major Player or Not	<b>Dr. David J. Pritchard</b> President
4:25-4:45	SITA GLOBAL ENTERPRISE Integrating Communications and eBusiness- Enabling a Global Strategy	<b>Kevin Wright</b> VP-Aerospace Solutions
4:45-5:00	INVEST QUÉBEC Roads to the North American Aerospace Market	<b>René Parent</b> Dir- Business Dev. Overseas
5:00-5:10	Wrap-Up	<b>Gilbert Speed</b>
5:10-6:00	Farewell Reception – Hotel Patio; sponsored by <b>CIT Aerospace</b> <b>Boeing 777-300</b> airplane model will be raffled (must be present to win)	

### SEPTEMBER 26, THURSDAY

Three tours offered: (see registration desk for details)

- Visit the A380 Assembly Site, or ATR Production Facilities, or Hamburg