Bob Lange: SVP, Head, Business Analysis & Market Forecast • Airbus

Mr. Bob Lange's team is responsible for market research and forecasting, business analysis and benchmarking to support Airbus Strategy covering products, services and value chain positioning. In over 30 years at Airbus, his responsibilities have alternated between marketing Airbus and its products towards the outside world and acting as the Voice of the Customer internally in the field of product development. Before being appointed Vice President for Marketing in 2011 and Head of Market Forecast and Product Strategy in 2013, he led the Interiors Marketing team. Mr. Lange began his career as a Future Projects engineer in the military transport segment after completing an apprenticeship and an honors degree in Engineering at Bath University.

Dr. Kevin Michaels: Managing Director • AeroDynamic Advisory

Dr. Kevin Michaels is Managing Director of AeroDynamic Advisory, a specialty consulting firm focused on the global aerospace and aviation industries. His 33 years of aviation experience include hundreds of consulting engagements for leading aviation and aerospace companies across the globe. Dr. Michaels is a contributing columnist to Aviation Week & Space Technology and Forbes and also chairs the Industry Advisory Board of the University of Michigan's Aerospace Engineering Department at the same time as on the Board of Directors of Proponent, a leading aerospace distributor. His Bachelor's degree in Aerospace Engineering and an MBA degree were obtained from the University of Michigan, and MSc and PhD degrees in International Relations from the London School of Economics. In 2018, he authored AeroDynamic: Inside the High-Stakes Global Jetliner Ecosystem.

Richard Apps: Director • Counterpoint Market Intelligence

In 2004, after a career with GKN and Westland, Mr. Richard Apps joined with George Burton to launch Counterpoint Market Intelligence Ltd., an aerospace market research and strategic planning consultancy. His aerospace career in production management started at Marconi Avionics (now part of BAE Systems). In 1991, he joined Westland Group and stayed on with GKN after it acquired Westland in 1994. Mr. Apps worked on strategic planning, business development and the evaluation of acquisitions and managed GKN’s industrial offset commitments in Kuwait. Mr. Apps holds a Master's degree in Business Administration from Manchester Business School and an Engineering degree from Cambridge University.

Jerrold T. Lundquist: Managing Director • The Lundquist Group

Mr. Jerrold T. Lundquist is Managing Director of The Lundquist Group which provides strategic advisory services to senior management, private equity and other investors focused on the aerospace, defense, high tech and airline industries and is also a Director Emeritus of McKinsey & Company, Inc. Over a 30-year career, he headed the Global Aerospace and Defense Practice and oversaw the Firm’s service to leading aerospace and defense companies worldwide. Prior to joining McKinsey, he was a Vice President of Emery Air Freight Corporation with overall responsibilities for Planning, Pricing, and Worldwide Facilities. During 1985 to 1986, he served a White House Fellowship as Special Assistant to the Secretary of Transportation, focusing on aviation and transport issues for the Department and the White House. Mr. Lundquist has served on the immediate staffs of the Secretary of the Air Force and the Chief of Staff of the Air Force, and in several staff roles on Capitol Hill. A Distinguished Graduate of the United States Air Force Academy, he also holds an M.A. in International Affairs from The Fletcher School of Law and Diplomacy and a Master's degree in Public Policy from the School of Government of Harvard University.
Speaker Biographies
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Wendy R. Sowers: Director, Market Forecasting • Boeing Commercial Airplanes

Ms. Wendy Sowers leads Boeing Commercial Airplanes’ analysis of the airline industry. In her current role, she directs the development of Boeing’s annual Current Market Outlook – a 20-year global forecast for air traffic and airplane demand – as well as near and midterm market analyses supporting Boeing Commercial Airplanes’ business and strategic planning. Ms. Sowers has been with BCA for 20 years in a variety of roles including product marketing, competitor analysis and strategy, and supply chain management.

Wellington Sperandio Silva: Market Strategy Associate - Commercial Aviation • Embraer

Mr. Wellington Silva started at the company as a Business Analyst, later moving to the Market Strategy Team and is responsible for market research and forecasts. With his extensive experience in business strategy, financial planning and analysis, having worked in some of the Fortune 500 companies, he supports the regional market understanding for North America, Europe and Latin America, identifying and developing new business opportunities. Mr. Silva holds a Bachelor's degree in Engineering and an MBA from Fundação Getúlio Vargas.

Paul Salwik: Head of Supply Chain • Norwegian Air Shuttle

Mr. Paul Salwik has been in the aviation industry for 37 years. Currently, he is Head of Supply Chain at Norwegian Air Shuttle in addition to the position of Manager, Engineering & Maintenance Planning. Mr. Salwik has extensive knowledge of the aviation industry. He has held management positions within aircraft interior production, material service development for Airbus, managing a start-up distribution company in a joint venture with Airbus, Airbus Customer Service, Engineering and Technical Documentation, aircraft maintenance and consulting services.

François Lehmann: Managing Director & CFO • Liebherr-Aerospace & Transportation

Mr. François Lehmann has more than 29 years of experience in the Liebherr Group, 23 in the Aerospace & Transportation division. His career started at Liebherr in the earthmoving division in 1990 as Assistant to the Finance Director and later on moved to Liebherr-Great Britain in Hatfield as Financial Controller in 1991 and then to Toulouse, France to become Financial Controller of Liebherr-Aerospace. After 12 years in Finance positions, he moved in 2003 to the US to become President of Liebherr-Aerospace Saline Inc., a repair station in Michigan. In 2006, he was nominated Managing Director of Liebherr-Aerospace Toulouse, more particularly in charge of Sales, Customer Service, Finance, Human Resources and Information Systems. In 2018, he became Managing Director and CFO of the Liebherr-Aerospace & Transportation division in charge of Finance, Human Resources, Information Systems and Purchasing. Mr. Lehmann holds a degree in Controlling, Finance and Accounting from EM Strasbourg, the Business School of the University of Strasbourg, France.
**Kenneth Herbert: Managing Director • Canaccord Genuity**

Mr. Kenneth Herbert is a Managing Director and Senior Aerospace & Defense analyst at Canaccord Genuity. As the US Industrial sector research team leader, he is responsible for global A&D research at Canaccord. Prior to Canaccord, he was the senior A&D analyst at Imperial Capital and Wedbush Securities. From 2003-2009, he ran the A&D consulting practice at Frost & Sullivan and was an associate to the No.1-ranked machinery analyst at Salomon Smith Barney from 2000-2003. Mr. Herbert received his MBA from the University of Michigan.

**Peter Zimm: Principal • Charles Edwards Management Consulting**

Mr. Peter Zimm leads strategy, market positioning, and operations improvement consulting projects for aerospace companies. A Principal for aerospace-focused management consulting firm Charles Edwards, he has delivered scores of projects for OEMs, Tier 1s, sub-tier suppliers, and raw materials companies across the world. Mr. Zimm is an internationally-recognized market expert in aerospace raw materials, aircraft components, manufacturing process technologies, and aircraft emissions. Prior to joining Charles Edwards, he was a Principal at ICF Aviation's Aerospace & MRO practice. He began his career at Timken Aerospace where he held various business development, marketing, and sales management positions and co-architected the company's aftermarket entry strategy. Mr. Zimm has a Masters in Business Administration from Boston University and a Bachelor's degree from Dartmouth College.

**Dr. Matthias Miermeister: Head, Field Engineering - Global Aerospace • Aleris**

Dr. Matthias Miermeister acts as Head of Field Engineering and Early Vendor Involvement for the global aerospace industry with focus on all major OEMs. In April 2002, he joined Aleris, a global manufacturer of flat rolled aluminum products with manufacturing sites in the US, Europe and China. Prior to his appointment at Aleris, he has served in various technical and leading positions at Aluminium Rheinfelden in Germany and started his career in the aluminum industry in 1995. Dr. Miermeister holds a Ph.D. in design of light-weight structures and a Master's degree in Aerospace Engineering from RWTH Aachen, Germany.

**Frederic Barthe: Program Director - Airbus • Hexcel**

Mr. Frederic Barthe has been with Hexcel since 2018. Previously, he served as Airbus Parts Program Director at Stelia Aerospace and Director of Services Program for Aerolia in UAE. Mr. Barthe joined Airbus in 2005 as head of Meaulte plant Machining and subsequently, Assembly Operations. Also, he has held positions with automotive Tier 1 supplier Autoliv, in different managing positions and products commodities including industrial engineering, project leader, supply chain and plant director. Mr. Barthe graduated from Aerospace Engineering school ISAE-Sup'Aero.
Mr. Harry Kiskaddon leads the Global Aerospace Sales organization for Constellium. The Constellium Aerospace team works closely with customers around the world to provide innovative high performance products and solutions supporting commercial, defense, and space applications. Mr. Kiskaddon served as a Surface Warfare Officer in the US Navy, rising to positions of Operations Officer and Executive Officer and then he had a career with Alcoa and retired from Arconic (previously named Alcoa) in 2017. Recently he joined Constellium and relocated to their Zurich offices in Jan 2019. Mr. Kiskaddon graduated from Bethany College, in West Virginia.

Mr. Michael Stromberger has been leading the Aerospace & Automotive business area of voestalpine BÖHLER Edelstahl since 2007. This responsibility includes Strategy, Product Management and Global Sales for all product forms including Billets, Bars, machined parts and Powder for 3D printing. His career started as a trainee in Sales and Marketing in 1999. Following the investments in vacuum melting and re-melting technologies in 2000, he held responsibility for business development of Ni Alloys and all products for the Power Generation Industry. In 2010, he became chairman of the Nickel Alloy Group at EUROFER. Mr. Stromberger holds a Master's degree in Mechanical Engineering from the Technical University of Graz, Austria.

Mr. Robert Thomson is a Partner in Roland Berger's Aerospace & Defense competence center based in London and has extensive consulting experience, encompassing strategy, M&A and operational improvement assignments for leading airlines, aerospace companies and governments in the United Kingdom, Europe, Asia and the United States. Prior to joining Roland Berger, he worked as an investment analyst in the City of London and an engineer at Rolls-Royce. Mr. Thomson holds a Master's Degree in Business Administration with Distinction from the London Business School and a First Class Engineering degree from Cambridge University, where he was elected to the Sir Henry Royce scholarship.

Mr. Trevor Stansbury is the founder and CEO of Supply Dynamics and is a subject matter expert on the adoption of “digital thread” and predictive analytic solutions in the extended supply chain. For the last 16 years, he has pioneered digital transformations at some of the largest manufacturing companies in the world including such companies as General Electric, Westinghouse, United Technologies and many others. Mr. Stansbury and his team help OEMs collaborate with Tier 1-Tier N suppliers on the timely purchase and supply of metals, plastics, electronic components and other raw materials in highly distributed manufacturing environments to lower cost, standardize materials and improve operational performance. Prior operating executive roles include: Director of International Programs & Risk/Revenue Sharing Programs at Honeywell and President of a trading company established by McDonnell Douglas (now Boeing Helicopter). Mr. Stansbury holds Executive Certificates in Artificial Intelligence and Strategy & Innovation from MIT Sloan School of Management and an MBA from the Thunderbird School of Global Management.
### Speaker Biographies

#### Chris Tarry: CEO • CTAIRA

Mr. Charles Armitage is a director and head of European Aerospace & Defence Equity Research at Citibank, having been an Aerospace & Defence Analyst for 19 of the last 23 years. Before joining Citi, he has variously been an equity analyst at UBS (2011-16), Merrill Lynch (2000-09) and Lehman Brothers (1995-97), an investor at Putnam (1997-2000) and a strategy consultant at Charles River Associates (2009-11) and OC&C (1993-95). Mr. Armitage is a Rolls-Royce-trained engineer and holds a Bachelor's degree in Mechanical Engineering from the University of Bristol.

#### Charles Armitage: Director & Head of European A&D Equity Research • Citibank

#### Andrew Gordon: Director, Strategic Marketing & Analysis • Airbus

Mr. Andrew Gordon moved to the Airbus’ headquarters in Toulouse in 2001 and today is the Director of Strategic Marketing and Analysis. As part of this role, he is responsible for facilitating the production of the Airbus Global Market Forecast which details future demand for all civil aircraft of 50 seats or more. Prior to this appointment, he worked for British Aerospace Airbus as part of the Forecasting & Market Evaluation Team where he was involved in providing analysis for many of the market and product-related decisions including the A380 project. At the creation of Airbus as a single entity, he moved to Toulouse to work directly for Airbus in the Market Forecasting & Research Group, now part of the Strategy and Cooperation team. His career began with BAE/Airbus in 1991, and prior to that he worked for one of United Kingdom’s largest banks. Mr. Gordon has a Master's degree in Marketing from the University of the West of England.

#### Peter Johnston: Vice President, Customers - Airbus • Rolls-Royce

Mr. Peter Johnston joined Rolls-Royce in 1990 as an aircraft performance analyst, after working in aerodynamics and marketing with British Aerospace. Since then, he has worked in various marketing and engineering roles in Rolls-Royce and its subsidiary companies, including BMW Rolls-Royce, where he was heavily involved with the launch of the Boeing 717, and International Aero Engines, where he was responsible for Product Strategy. From 2004, he took responsibility for Business Development for powerplants on a variety of new aircraft programmes. In 2010, he moved to the Marketing team, and was then appointed Head of Customer Marketing, Airbus Programmes. In this role, he led Marketing on all Trent 700, Trent 500 and Trent 900 opportunities. From 2015, he led Rolls-Royce’s Marketing on all Airbus programmes as Vice President, Marketing. In addition, he was responsible for Rolls-Royce’s marketing activities with airlines and has now moved to represent Rolls-Royce in Toulouse as Vice President, Customers – Airbus. Mr. Johnston holds a degree in Aeronautical Engineering.

#### Dr. Marc Le Dilosquer: Senior Manager, Market Analysis • MTU Aero Engines

Dr. Marc Le Dilosquer is Director, Market Analysis at MTU Aero Engines in Munich where he leads a team of market analysts, monitoring civil, military and industry gas turbine engine markets and developing delivery, spare parts and MRO forecasts for MTU’s strategic planning and business development. The focus is on the commercial market, including large commercial aircraft, business jets and regional aviation, market segments behind MTU’s organic growth strategy. His career started as an aircraft performance engineer at Rolls-Royce in Derby responsible for the performance and operating economic analysis of Boeing 747/767 variants and their envisaged derivatives. Prior to joining MTU, he held the position of Product Marketing Manager - High Wing Aircraft, at Fairchild Dornier in Germany. Mr. Le Dilosquer holds an Aerospace Engineering Degree from ENSICA in Toulouse, as well as a Master's of Science and PhD in Thermal Power from Cranfield University.
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Mr. Joaquín Gonzalez-Stetzelberg has over 30 years of senior management experience in the aerospace industry, procurement, project management, production, strategy, marketing and business development. Since 2014, he has been serving as Director, Strategy and Business Development for UMI Aero Group. In 2019, Mr. González Stetzelberg cofounded the aerospace consulting firm AeroSM (Stetzelberg & Marquez) with Mr. Ramon Rodriguez.

Mr. Alexandre Lang worked in sales management and business development positions for the UK-based, parts-trading Flightspares Group and then for Goodrich Aerospace in the Avionics and Aerostructures divisions until 2001. Mr. Lang joined Messier-Dowty (now Safran Landing Systems), as Customer Support Director for Central Europe and the Middle East where he spent five years developing innovative business solutions and supporting key customers’ products and services requests. In 2006, he joined Safran Transmission Systems (Hispano-Suiza) as Contract and Sales Deputy Director for three years, then moved on to Safran Aircraft Engines (Snecma) in February 2009 where he first managed the TRUEngine program as Marketing Product Director and helped launch new projects before heading the Civil Aviation Market Studies, Forecasts and Research team from 2010. Mr. Lang holds several diplomas in international trading and management, attended Boston College as an MBA exchange student and graduated from the EM Strasbourg College in 1997.

Dr. Ronald J. Epstein joined Merrill Lynch in 2001 as an industry analyst in Fundamental Equity Research covering the U.S. Aerospace and Defense Sector. Currently, he is a Managing Director in Equity Research at Bank of America Merrill Lynch covering Aerospace/Defense and Multi-Industrials with large aerospace components and actively covers companies in the U.S., Canada and Brazil. In the Institutional Investor All-America Research poll, he has ranked as a top three analyst in Aerospace & Defense Electronics for the last nine years and number one for the last three years. Prior to Merrill Lynch, he was a research scientist working in the Applied Aerodynamics Technology Group at the Boeing Phantom Works in St. Louis, MO. During that time, he was also an adjunct faculty member in the Department of Mechanical Engineering at Washington University in St. Louis, teaching fluid dynamics and control systems. Mr. Epstein completed his MBA with honors from the Wharton School at the University of Pennsylvania and also holds a Ph.D. in Mechanical Engineering from Duke University and a BA with highest honors from Skidmore College.

Mr. Jonas Murby is a Principal at AeroDynamic Advisory, a specialty consulting firm focused on the global aerospace and aviation industries. His 17 years of aerospace experience includes more than 50 consulting engagements for leading aviation and aerospace companies across the globe. Prior to joining AeroDynamic Advisory, he worked for nine years as a management consultant, first as Principal at ICF, and later through his own company Merxcell, assisting a global set of MROs, OEMs and investors with market analysis, market strategy, transaction support and customer satisfaction. Earlier, he worked for six years at Scandinavian Airlines and ST Aerospace Solutions in Denmark, with responsibilities on market analysis, value proposition development, business development and negotiation of industrial partnerships. This included two years as a commercial liaison at EADS Sogerma in France. Mr. Murby holds a Master of Science degree in Mechanical Engineering from Chalmers University of Technology with a specialization in Industrial Marketing and Logistics.
Mr. Marko Niffka has been with MTU since 2005, initially starting in Market Research, then heading Sales for the India market region and is currently responsible for projects to grow MTU’s maintenance business. Prior to joining MTU, he worked in Network Management at Deutsche Bahn -- Germany's train service, and briefly at Northwest Airlines as Senior Analyst Market Planning. Mr. Niffka holds a Bachelor's degree in Economics from the University of Minnesota and an MBA from Arizona State University.

Mr. David Stewart has 35 years of aviation industry and consulting experience, and is a subject matter expert in multiple aspects of the airline, aerospace and maintenance supply businesses. Currently, he is a Partner in Oliver Wyman's Aviation and Aerospace practice, based in London and is supporting the establishment of CA VOK in Europe, Oliver Wyman's airline technical consulting business. During his consulting career, he has led assignments with leading aerospace manufacturers, service suppliers and airlines in Europe, the Middle East, Asia Pacific, Africa and North America. Mr. Stewart is a recognized expert in the aircraft maintenance and air transport manufacturing sectors and airline technical operations. The majority of his project experience has focused on strategy development, market analysis, transaction support, aircraft acquisitions/fleet planning and restructuring.

Ms. Sandrine Lacorre is a graduate from ENSMA (Ecole Nationale Supérieure de Mécanique et d’Aérotechnique) and from RMIT (Royal Melbourne Institute of Technology). In 2001, she joined SNECMA (Engineering Research & Technology Department) as an Aerodynamic Engineer, designing high pressure compressor blades. In 2006, she then moved to the CFM Sales Engineering, working on sales campaigns for either Airbus A320 or Boeing 737. In 2011, she joined the CFM marketing team and became the LEAP Product Marketing Director. Currently, she is at the head of the Safran Aircraft Engines' product marketing team.
**Joanna Speed: Managing Director, A&D and SpeedNews Conferences • AWN**

In 1979, Gilbert Speed, one of the aviation industry’s respected entrepreneurs, launched SpeedNews, along with his wife Ann Speed, which quickly became the aviation industry’s most innovative newsletter. Under the tutelage of her father Gil, Joanna Speed began her informal education in commercial aviation at SpeedNews, and studied business in the Pepperdine University graduate program. Ms. Speed then took on an executive management role with greater responsibility within the company, streamlined the company to increase revenue and reduce costs, led the effort toward online distribution and created new marketing programs for large corporate subscribers. When SpeedNews Conferences emerged as the nation’s most influential forecasting and intelligence forums, Ms. Speed refined and expanded marketing strategies for the Aviation Suppliers Conferences. As Managing Director, she introduced four successful forecasting and intelligence forums for the Aerospace & Defense Industry. In 2006, SpeedNews was purchased by Penton and following Penton’s acquisition of Aviation Week in 2013, Ms. Speed was promoted to Managing Director, Aerospace & Defense Events for the Aviation Week Network, with an expanded portfolio and launched DefenseChain, featuring Program Excellence and Banquet, A&D Mergers & Acquisitions Conference, and Executive Roundtables. Penton was acquired by Informa in 2016.

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**Paul Finklestein: Vice President, Product Marketing • Pratt & Whitney**

Mr. Paul Finklestein leads the Marketing team for Pratt & Whitney’s Commercial Engines division, and in this role, has marketing responsibility for all Pratt & Whitney products and services worldwide. In 1979, he joined Pratt & Whitney and has held numerous positions in engineering, program management and customer service organizations. Prior to leading the marketing activity, he was the Program Manager for the PW4000 engine family, and then most recently the Regional Director of Customer Service in the Asia Pacific region. Mr. Finklestein holds a Bachelor’s degree in Mechanical Engineering from Boston University, a Master’s degree in Engineering from Rensselaer Polytechnic Institute and a Master’s degree in Business Administration from the University of Connecticut.

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