Speaker Biographies
SpeedNews 18th Annual Aviation Industry Suppliers Conference in Toulouse (AISCT-18)

Dr. Kevin Michaels: Managing Director • AeroDynamic Advisory

Dr. Kevin Michaels is Managing Director of AeroDynamic Advisory, a consulting firm focused on the global aerospace and aviation industries. His 30 years of aviation experience includes hundreds of consulting engagements for leading aviation and aerospace companies across the globe. Dr. Michaels is a globally recognized expert in the aerospace manufacturing and MRO sectors, and also has significant expertise in business-to-business marketing, customer satisfaction, M&A advisory, technology assessment, cluster development, and strategic planning. His experience spans all major market segments, including air transport, business & general aviation, and military. Previously, he was a VP with ICF's Aerospace & MRO consulting practice, was a co-founder and partner with AeroStrategy until its acquisition by ICF. Prior to that, he was Director - Strategic Development with Rockwell Collins Government Systems, and Principal with The Canaan Group, an aerospace consultancy. Dr. Michaels began his career as a project engineer with aeroengine supplier Williams International. His Bachelor's degree in Aerospace Engineering, an MBA degree, was obtained from the University of Michigan, and MSc and PhD degrees in International Relations from the London School of Economics.

Robert Thomson: Partner • Roland Berger

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.

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

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 O&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.

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.
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<td><strong>James R. Billing:</strong> Managing Director, Airline Market Analysis • Boeing Commercial Airplanes</td>
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<td>Mr. James R. Billing is the leader of Boeing Commercial Airplanes’ Airline Market Analysis Group. His team is responsible for providing Boeing’s market outlook for the future of air transportation and the demand for commercial jet airplanes. The Market Analysis team consists of experts from a variety of fields including economics, airline strategy, network development, fleet planning, air cargo, aviation infrastructure, product development, and aftermarket services. Each year, Market Analysis publishes Boeing’s “Current Market Outlook”, a forecast of the future of air transportation developments, including an assessment of key industry trends, traffic growth, fleet development, and airplane delivery requirements. The group also prepares the biennial Boeing “World Air Cargo Forecast” which focuses on the future of the air cargo industry, provides a forecast of air cargo growth and the freighter fleet. Market Analysis is also responsible for assessing the current air transportation business environment and near-term airplane and services requirements in support of Boeing’s business planning process. During his career at Boeing, Mr. Billing has also worked in product development, airplane financing, sales support and special projects.</td>
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| **Jonathan A.D. Barron:** Market Analyst, Civil Aerospace • Rolls-Royce |
| Mr. Jonathan Barron is a Market Analyst within the Civil Aerospace division of Rolls-Royce, where he started his career in the pharmaceutical and brewing industries. Over the last 10 years at Rolls-Royce, he has worked as a Service Engineer specialising in engine reliability and maintenance optimisation, then as a forecasting expert focusing on application of the latest data transformation and business intelligence capability. Mr. Barron holds a degree in Mechanical Engineering from Imperial College London. |

| **Alexandre Lang:** General Manager, Market Studies & Research, Civil Aviation • Safran Aircraft Engines |
| 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 (SAFRAN Group, Landing Gear OEM), 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 he 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 and Research organization 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. |

| **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. |
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.

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 leading the establishment in Europe of CAVOK, 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.

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.

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, Mr. Johnston 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 has led Rolls-Royce’s Marketing on all Airbus programmes as Vice President, Marketing. In addition, he is responsible for Rolls-Royce’s marketing activities with airlines. Mr. Johnston holds a degree in Aeronautical Engineering.
### Speaker Biographies

#### 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.

#### Joaquín Toro-Prieto: Head of Market Analytic & Messaging • Airbus

Mr. Joaquín Toro-Prieto was appointed to his current position in September of 2015. His aeronautical career began as a junior engineer for Gamesa, then joined Airbus in 2000 as a Marketing Analyst. Mr. Toro-Prieto has been based in two continents, three countries and four cities. Positions he has held within Airbus Commercial Division ranged from being responsible for the Latin America Marketing team to support the initial launch of the A320neo Family. Mr. Toro-Prieto holds a Master’s degree in Aeronautical Engineering from ETSIA and an MBA from IE Business School.

#### Andrew Magill: Managing Director, Marketing - Europe • Boeing Commercial Airplanes

Andrew Magill leads the European marketing team responsible for market strategies and analysis in support of sales and product strategy for airlines based in Europe. Named to this position in August of 2017, Mr. Magill is responsible for marketing efforts across Commercial Airplanes Boeing’s family of commercial products in Europe, and also provides analysis of market trends and forecasts for the media and industry partners in Europe. In previous roles, Mr. Magill worked in various international marketing positions, developing strategies for specific countries and regions, and led the market analysis team responsible for the Current Market Outlook. And before that, he led the marketing team for the Americas region during the market downturn after Sep. 2001. Mr. Magill holds a Bachelor’s degree in aeronautical engineering from the University of Washington and a Master's degree in business administration from Seattle University.

#### Zuzana Hrnkova: VP, Marketing • ATR (Avions de Transport Regional)

Ms. Zuzana Hrnkova leads the team responsible for Market Strategy, Airline Marketing and Product Development at ATR. Starting her career as a trainee with Airbus and then as Performance Engineer in the Product Marketing group, she moved to the A330/A340 product marketing group where she supported the marketing and entry in service of the A340-500 and A340-600. From 2003 to 2007, she was Payload Accommodation Manager, responsible for explaining Airbus cabin to customers and providing the cabin engineering team with customer and market requirements. Her development continued as Aircraft Interiors Marketing Director, responsible for supporting sales campaigns and supporting cabin interiors developments and working on market strategy, and her last assignment at Airbus was Head of Aircraft Interiors Marketing. Ms. Hrnkova holds degrees from the Air Transport University of Zilina, Slovakia and the French School of Civil Aviation (ENAC) in Toulouse.
**Ross Mitchell: VP, Commercial Operations • Bombardier Commercial Aircraft**

Mr. Ross Mitchell is Vice President, Commercial Operations for Bombardier Commercial Aircraft, a role which encompasses Strategy, Deal Management and Industry Affairs for Commercial Aircraft. In 1998, he joined Bombardier in the Contracts Department of Regional Aircraft. In 2000, he transferred to Sales in the International region, working in Europe, Africa and the Middle East. In 2010, he moved to Bombardier Business Aircraft taking a role in the European Sales team and working in the Strategic Accounts Group. In 2014, he was tasked with running the European region for Bombardier Commercial Aircraft as Regional Vice President, European Sales. From August 2014 to October 2015, he assumed the role of Vice President, Business Acquisition. Prior to joining Bombardier, he practiced law at McMillan Binch. Mr. Mitchell holds a Bachelor’s degree in Economics from McMaster University and a Juris Doctor from the University of Toronto.

**Rodrigo Silva e Souza: VP, Marketing • Embraer Commercial Aviation**

Mr. Rodrigo Silva e Souza is the VP, Marketing at Embraer Commercial Aviation, responsible for new product development, sales engineering, market forecast and strategic planning. Mr. Souza started as product development engineer in the ERJ145 program. Later, he moved to Market intelligence department where he performed several different roles. As Director of Product Strategy he led the marketing activities during the early development stages of the E-Jets and more recently during the advanced design of the E-Jets E2. Mr. Souza holds a Bachelor's degree in Mechanical Engineering and an MBA in Marketing.

**Dr. Ronald J. Epstein: Managing Director, A&D Global Research • BofA - Merrill Lynch**

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 at the firm and is the Senior Aerospace and Defense Equity Analyst for the Americas, and actively covers companies in the U.S., Canada and Brazil. In 2015, he made Institutional Investor's All America Research Team and was ranked as the number one analyst covering the U.S. Aerospace and Defense Sector. Mr. Epstein has been ranked by Institutional Investor among the top three analysts covering the sector for the last seven consecutive years. In 2008, he was identified by Institutional Investor as a “Best Up-and-Comer”. For eight years, he has placed among the top three analyst teams covering Latin American Aerospace and Transportation. 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. 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.

**Jonas Murby: Principal • AeroDynamic Advisory**

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.
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Juan Carlos Ortiz Villajos: Senior VP, Business Development - Corporate • Aernnova

Mr. Juan Carlos Ortiz Villajos is responsible for all business development activities and commercial proposals for new contracts and programs, including the definition and analysis of the "Most Efficient Solutions" from technical, industrial and financial points of view. Previously, he served as the President and Managing Director of Aernnova Engineering US where he led the start-up and development of all engineering activities of Aernnova in North America. Mr. Ortiz also served for two years as CEO and Managing Director of Composite Aeronautic Group (CAG), a Spanish company devoted to the design, development, certification and production of Light Sport Aircraft for the US market. Before assuming those positions, he enjoyed a career at Gamesa Aeronáutica where he held engineering and management positions. His career began at Boeing in Seattle as a stress engineer for the 737 NG and 757 programs. Mr. Ortiz holds Bachelor's and Master degrees in Aerospace Engineering from the Polytechnic University of Madrid and an MBA from the University of the Basque Country, Spain.

Steven Guo: Senior VP, Aviation Research • DVB Bank

Mr. Steven Guo is a Senior Vice President of DVB’s Aviation Division based in London where his main responsibilities include analyzing aviation markets, aviation assets, and in-depth analysis and evaluation of transactions. Prior to joining DVB, he worked as a Relationship Manager at Global Transportation Group at the headquarters of Fortis Bank (now ABN AMRO) in Rotterdam, where he executed several structured transactions in both shipping and aviation. His career began at the investment consultancy group of Ernst & Young in Holland. Mr. Guo graduated from Erasmus University and completed exchange program at Cambridge University, and also holds a Master's degree in Economy and Finance from Rotterdam School of Management. Mr. Guo has received extensive professional training and education such as the Falconbury Executive MBA program in London, New York School of Aviation Finance and fleet planning course with Boeing in Seattle, WA.

Peter Zimm: Principal, Aerospace & MRO Advisory • ICF

Mr. Peter Zimm has over 20 years of aerospace experience in strategy development, acquisitions and integrations, market management, and marketing communications. Since joining ICF, he has helped clients improve performance through market studies, strategy development, acquisition searches, market due diligence, and operations and supply chain due diligence projects. His areas of market expertise include aerospace supply chain, manufacturing, and raw materials; product, process and aircraft technologies; and MRO. Mr. Zimm also has experience in operations and supply chain assessment and improvement. Prior to joining ICF, he held various Business Development, Marketing, and Sales management positions for Timken Aerospace and Timken Aftermarket Solutions. Mr. Zimm holds a Bachelor’s degree in Economics and Government from Dartmouth College and an MBA from Boston University.

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, in Europe and China. Prior to his appointment at Aleris, he has served in various technical and leading positions at Aluminum 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.
Joanna Speed: Managing Director, A&D and SpeedNews Conferences • SpeedNews

In 1979 Gilbert and Ann Speed launched SpeedNews, the aviation industry's most innovative newsletter. In 1994 their daughter Joanna Speed joined the company putting to use her degree from Cal Poly State University San Luis Obispo and her acumen for business and marketing. While beginning her informal education in commercial aviation under Publisher Gil Speed, she studied business in the Pepperdine University graduate program. Over the years, Ms. Speed 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 influential forecasting and intelligence forums, she refined and expanded marketing strategies for the Aviation Suppliers Conferences. As Managing Director, she introduced three more forecasting and intelligence forums for the Aerospace & Defense Industry. SpeedNews has been part of Penton’s Aviation Media Group since 2006. Following Penton’s acquisition of Aviation Week in 2013, Ms. Speed was promoted to Managing Director, Aerospace & Defense Events, with an expanded portfolio of Conferences that now includes AerospaceDefenseChain, formerly SpeedNews Annual Aerospace & Defense Suppliers Conference, Aviation Week’s A&D Programs, Defense Technology & Requirements and Executive Roundtables.

Didier Perdriat: Director, Key Account - Airbus • Constellium

Mr. Didier Perdriat's main responsibilities include negotiation of multi-year contracts with Airbus for Aluminium flat rolled products and extrusions. His career began as extrusion production manager at Pechiney group in 1985 and moved to several positions as sale director for Aluminium semi-products and casting products (Aerospace and Industry) inside Pechiney group, Alcan and Rio Tinto. Mr. Perdriat graduated from Ecole Centrale de Paris and Technische Hochshule from Aachen and holds a Master’s degree in Economy and Finance from Sorbonne University in Paris.

Michael Stromberger: Head of Business Area - Special Materials, Aerospace & Automotive • BÖHLER Edelstahl

Mr. Michael Stromberger has been leading a global sales team, as well as the Product Management and Strategy team in the mill, for the Aerospace & Automotive business area of BÖHLER Edelstahl where he started his career as a trainee in Sales and Marketing. In 2010, he became chairman of the Nickel Alloy Group at EUROFER. Since 2015, he has coordinated the marketing activities for all BOHLER Companies under the umbrella of BOHLER Aerospace. 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. Mr. Stromberger holds a Master's degree in Mechanical Engineering from the Technical University of Graz, Austria.