

# EXECUTIVE REPORT

A QUARTERLY DIGEST FOR THE AEROSPACE INDUSTRIES ASSOCIATION



U.S. SECRETARY OF DEFENSE ROBERT GATES  
VISITS LOCKHEED MARTIN CORPORATION



## EXECUTIVE REPORT

PRESIDENT'S

# Message

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**Scott C. Donnelly**, *Vice Chairman*

**Marion C. Blakey**, *President & Chief Executive Officer*

**Ginette C. Colot**, *Secretary-Treasurer*

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BAE Systems*

### EX OFFICIO

**Clayton M. Jones**

*Chairman, President & Chief Executive Officer,  
Rockwell Collins, Inc.*

Despite strong headwinds, we can confidently say that AIA achieved significant successes in 2009.

A number of AIA initiatives yielded positive results — some in areas where we've been engaged for years.

It's also been a challenging time as the incoming administration was finding its foothold in Washington, and we engaged with a new team involved in shaping our issues.

We witnessed the fruits of our labor at our Board of Governors meeting in Phoenix in November when senior officials from the Defense Department, U.S. Air Force, NASA and the FAA joined us to discuss issues vital to both government and industry. We're looking forward to regular meetings next year with Secretary of Defense Robert Gates and Deputy Secretary Bill Lynn to further expand our communications with industry's largest customer.

### KUDOS TO THE AIA BOARD

I encourage you to read our year-end review of association activities that Chairman Bob Stevens presented at last month's board meeting, which can be found on page 4.

Bob Stevens has done a tremendous job as Chairman this year. His many accomplishments at AIA are even more impressive considering the immense responsibility of his day job running Lockheed Martin. In particular, Bob deserves a lot of credit for establishing the Global Principles of Business Ethics for the Aerospace and Defense Industry with our sister association, the AeroSpace and Defence Industries Association of Europe. Early on, he focused on raising global ethics standards as signally important, and

ABOUT THE COVER: U.S. Secretary of Defense Robert Gates speaks to reporters at a news conference in front of an F-35 Lightning II fighter at Lockheed Martin Fort Worth, Texas.

*...senior officials from the Defense Department, U.S. Air Force, NASA and the FAA joined us to discuss the issues vital to both government and industry.*



*Under Secretary of Defense Dr. Ashton Carter*

along with the pending interagency review of the U.S. export control system, we are well on our way to leveling the international playing field for our members.

Thanks also to Scott Donnelly of Textron, our Vice Chairman in 2009, who will lead the board in 2010. And we are looking forward to having Jim Albaugh as our new Vice Chairman next year.

A special thanks also to Bob Sprole, our Supplier Management Council representative on the Executive Committee. Bob, who is President and Chief Executive Officer of Therm, Inc., has been an effective voice for suppliers and small businesses. Rotating off the committee after two years, Bob will be succeeded in 2010 by Charles Gray, Vice President and Chief Operating Officer of Frontier Electronic Systems Corporation.

### **MAKING PROGRESS EVERYDAY**

AIA has strongly advocated for more effective export controls in the form of defense trade treaties with the U.K. and Australia, which

we have been pushing the Senate to ratify this year. We've worked closely with Under Secretary of State Ellen Tauscher and had several meetings with congressional members and staff. We expect the Senate to act early in 2010.



*Under Secretary of State Ellen Tauscher*

Another major step forward in 2009 was raising awareness of the fragility of the defense industrial base. Last July we released a study prepared by AIA's Defense Policy Committee that outlined how industry consolidation and shareholder concerns have affected capacity over the years, hindering our ability to provide critical components and skills to DoD.

Based on our discussion with

Under Secretary of Defense Ashton Carter at our recent Board meeting, several pages in the upcoming Quadrennial Defense Review are expected to address this issue. Other steps forward include a Senate effort to establish an Assistant Secretary of Defense for Industrial Policy and another in the recently passed Defense bill to enhance a panel that will provide an independent assessment of the QDR.

### **MEETING CHALLENGES HEAD-ON**

AIA is prepared to tackle the issues coming at us, and there are many of them. What changes are in store for NASA? Will the United States continue to lead in space? The Review of U.S. Human Space Flight Plans Committee, chaired by former industry executive Norman R. Augustine, laid out stark options for the administration. We appreciate his leadership and candor in recommending the administration deal quickly with NASA's budget choices.

In recent testimony before the

*continued on page 5*



Robert J. Stevens  
Chairman, President & Chief Executive  
Officer, Lockheed Martin Corporation

## STEVENS LOOKS BACK ON YEAR AS AIA CHAIRMAN

With his year as chairman of Aerospace Industries Association drawing to a close, Bob Stevens summarized the group's many 2009 accomplishments at the November 19 Board of Governors meeting in Scottsdale, Arizona.

Stevens, who is Chairman, President and CEO of Lockheed Martin Corp., cited significant progress on several important initiatives, despite the challenging environment created by economic recession, world conflicts and a new presidential administration.

He credited AIA with successfully working with the Obama team from the start. During the transition, Stevens said, AIA reached out to the incoming administration, lawmakers and the general public to highlight the importance of the aerospace industry in a tough economy.

He also applauded AIA's efforts to reform the acquisition process and export control systems.

"AIA has championed a more responsible, transparent and high-performing acquisition process," he said, adding that AIA's position is aligned with that of the Obama administration. "We look forward to continuing to work closely with the administration to improve the acquisition process with a focus on stable program requirements, adequate and stable funding and contractor performance ... so we can execute with excellence, on time and on budget, to meet our government customers' needs."

Highlighting AIA's progress on the export control initiative, Stevens said: "We know it is essential to keep our most advanced technologies out of the hands of our adversaries and rivals. At the same time, the export control system has to operate predictably, efficiently and transparently, to enable the kind of technology trade and cooperation that enhances our nation's security and prosperity."

Stevens added that the overarching goal of all of these reforms is to deliver capabilities "where they are needed, in the field."

Stevens said one of the landmark events of the year for AIA was the adoption of the Global Principles of Business Ethics, signed jointly with the AeroSpace and Defense Industries Association of Europe in October in Helsinki.

"These comprehensive principles have been a long-term goal for AIA. They set new standards—zero tolerance of corruption, judicious use of advisors, management of conflicts of interest and respect for proprietary information," Stevens said. "Our agreement will help ensure our industry holds fast to the highest standards of business ethics."

He added that a common standard of ethical principles will help strengthen partnerships between U.S. and European aerospace firms. "It's the right thing to do. It's also the best thing for our continued success."

Among the other AIA accomplishments in 2009, Stevens noted it was the first year AIA operated under its strategic management plan, which puts a sharp focus on ethical and environmental stewardship as well as enhanced safety and security.

Finally, he said, "we also launched the first National Aerospace Day, to celebrate and honor our industry's two million men and women. . . Their service is vital to our nation's security and its economic competitiveness."

Saying he was honored to represent AIA as Chairman, Stevens thanked AIA President Marion Blakey, the Executive Committee, and all of the Board members for their support during the year, noting that many challenges remain.

"I am confident that, with all of our continued effort, we will meet and surmount those challenges," he said.

Stevens closed his remarks by introducing Textron CEO Scott Donnelly as the incoming 2010 AIA chairman. "He brings an engineer's training, top executive experience and proven commitment to the work of AIA." ▼



Wegner Photography, LLC

The 67th Board of Governors meeting in November included a number of high-profile speakers. 1) Rich Karlgaard, publisher of Forbes 2) Secretary of the Air Force Michael Donley discusses Unmanned Aircraft Systems on a panel with Aurora Flight Sciences CEO John Langford and FAA Administrator Randy Babbitt (not shown) 3) Brig.Gen. Robert Nolan of NORTHCOM talks with RTI Metals CEO Dawn Hickton 4) Rockwell Collins CEO Clay Jones, Marion Blakey and Randy Babbitt. Other speakers included Dr. Ashton Carter (page 3); NASA Deputy Administrator Lori Garver, ILFC Chairman Steven Udvar-Hazy and political pundit Donna Brazile.

continued from page 3

House Subcommittee on Space and Aeronautics, AIA Vice President of Space Policy J.P. Stevens pushed Congress to provide NASA with stable and robust funding and called on the Administration to treat space as a singular enterprise. This would allow the objectives and strategies of the many U.S. agencies using space assets to be coordinated at the White House level.

### ACCELERATION OF NEXTGEN

Transportation Secretary Ray LaHood and Federal Aviation Administration Administrator Randy Babbitt have expressed the administration's support for accelerating NextGen as a national infrastructure priority, as did the Bush Administration's Executive Order in 2008.

AIA has been in the forefront in promoting NextGen's importance to our economy and showing the administration that NextGen avionics equipment is a "shovel ready" infrastructure project built by U.S. manufacturers and worthy

of federal investment to help create jobs. As you know, the civil aviation industry directly or indirectly generates more than ten million jobs and \$1.2 trillion in economic activity each year. Bringing our outdated air traffic control system into the 21st century is one of the best ways to ensure job growth now and for the future.

### FURTHER IMPROVING OUR OUTREACH

We've had a tremendous year on Capitol Hill. We've been wearing out shoe leather with more than 250 visits to lawmakers' offices. We've presented expert aerospace testimony in person or in writing nearly 20 times on an array of industry issues.

We're now in the early stages of establishing AIA's first political action committee. This will let us host small Capitol Hill breakfasts where we come together as a single, unified industry and talk with key members about issues important to all of us.

### NATIONAL AEROSPACE WEEK AHEAD

On September 16 we held our first National Aerospace Day. AIA converged on Washington, D.C. and reinforced the value of the American aerospace and defense industry to members of Congress and the Administration. We promoted compelling evidence of its importance to America's economy, technological innovation, national security and job growth. It also provided a focal point for thanking our workforce all over the country.

A series of events on Capitol Hill, including a Supplier Management Council's "March to the Hill" and a reception honoring Wings of Liberty recipient Senator Daniel Inouye, rounded out the day. Many aerospace companies reached out to their employees to thank them for their day-in, day-out service to their industry, their companies and their nation. President Obama provided a congratulatory message recognizing the importance of our effort along with resolutions from the House and Senate. We even conducted

continued on page 6

## AIA WELCOMES NEW MEMBERS

At year's end AIA's membership roster stands at 106 regular members and 167 associate members. Here are the four newest regular members:

**Bombardier** is a global transportation company, with a presence in more than 60 countries on five continents. Headquartered in Montreal, Canada, its aerospace business has more than 32,500 employees and is the world's third largest civil aircraft manufacturer. [www.bombardier.com](http://www.bombardier.com)

**M7 Aerospace LP**, based in San Antonio, Texas, traces its roots back to the legacy aircraft company founded by Sherman Fairchild nearly a decade ago. Today, M7 is a leading provider of aerospace and defense services in aviation maintenance and repair, government logistic support and aerospace manufacturing. [www.m7aerospace.com](http://www.m7aerospace.com)

**PWC A+D Advisory** has more than 2,000 industry professionals across the globe ready to help the aerospace community. Improving operations, understanding globalization and financial and industry regulations, and using information technology as a key enabler are just some of its areas of expertise. [www.pwc.com](http://www.pwc.com)

**Triumph Group, Inc.** is a global leader in supplying and overhauling aerospace systems and components. With headquarters in Pennsylvania and operations in 58 locations, Triumph designs, engineers, manufactures, repairs and overhauls aircraft components, subassemblies and systems. [www.triumphgroup.com](http://www.triumphgroup.com)

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Bombardier Learjet 40XR Aircraft

Courtesy of Bombardier

*continued from page 5*

inside-the-beltway advertising with the tagline — “*Aerospace and Defense: the Strength to Lift America.*”

National Aerospace Day was such a success that we are expanding it to National Aerospace Week in 2010 so that AIA and our members have an enhanced opportunity to reach out to more significant stakeholders across the country. We plan to include an educational element to make certain that we're engaging the workforce of the future.



### STRATEGIC PLAN PAYS OFF

This is the first year we've operated with an AIA Strategic Plan, and it helped set the agenda for mapping our advocacy objectives and for writing our work plans. We met more than 90 percent of our targets and appreciate the yeoman's work from the councils and committees in

achieving this success.

Next year is likely to be as busy, but it's exciting to see our preparations and hard work in 2009 pay off in very important accomplishments for our members.

In closing, may each of you, your families and your employees have a prosperous year ahead.

Marion C. Blakey  
President & Chief Executive Officer

# AEROSPACE INDUSTRIES ASSOCIATION

## BOARD OF GOVERNORS

<b>David C. Adams</b> <i>President, Curtiss-Wright Controls Inc., Curtiss-Wright Corporation</i>	<b>Thomas J. Cassidy, Jr.</b> <i>President, Aircraft Systems Group, General Atomics Aeronautical Systems, Inc.</i>	<b>Dawne S. Hickton</b> <i>Vice Chairman &amp; Chief Executive Officer, RTI International Metals, Inc.</i>	<b>Christopher J. Kneizys</b> <i>President &amp; Chief Executive Officer, Micro-Coax, Inc.</i>	<b>Laurans A. Mendelson</b> <i>Chairman, President &amp; Chief Executive Officer, HEICO Corporation</i>	<b>Gary J. Spulak</b> <i>President, Embraer Aircraft Holding Inc.</i>
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## AIA MEMBER COMPANIES

AAR Manufacturing, Inc.	Breconridge Corporation	ESIS, Inc.	Kaman Aerospace Corporation	Northrop Grumman Corporation	Southern California Braiding Company, Inc.
Accenture	CAE USA Inc.	Esterline Technologies	L-3 Communications Corporation	NYLOK Corporation	Space Exploration Technologies Corporation
Acutec Precision Machining	Chromalloy	Exostar LLC	LAI International, Inc.	Omega Air Inc.	Sparton Corporation
Aerojet	Click Bond, Inc.	Flextronics International USA	LMI Aerospace, Inc.	Oracle USA, Inc.	Spirit AeroSystems
Alcoa Defense	Cobham	Flight Safety International Inc.	Lockheed Martin Corporation	Pall Aeropower Corporation	TechniGraphics
Allfast Fastening Systems, Inc.	CSC	FTG Circuits, Inc.	LORD Corporation	Parker Aerospace	Textron Inc.
American Pacific Corporation	Curtiss-Wright Corporation	General Atomics	M-7 Aerospace LP	Pinkerton Government Services, Inc	Timken Aerospace Transmissions, LLC Purdy Systems
AmSafe Aviation	<i>Curtiss-Wright Controls, Inc.</i>	Aeronautical Systems, Inc.	Marotta Controls, Inc	PPG Aerospace-Sierracin Corporation	Triumph Group, Inc.
AMT II Corporation	<i>Metal Improvement Company</i>	General Dynamics Corporation	McKechnie Aerospace	Remmele Engineering, Inc.	United Technologies Corporation
Analytical Graphics, Inc.	Dassault Falcon Jet Corporation	General Electric	Meggitt Vibro-Meter Inc.	Rockwell Collins	<i>Hamilton Sundstrand</i>
Aurora Flight Sciences	DRS Technologies, Inc.	Goodrich Corporation	Micro-Coax, Inc.	Rolls-Royce North America Inc.	<i>Pratt &amp; Whitney</i>
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B&E Group, LLC	DuPont Company	Groen Brothers Aviation Inc.	MOOG Inc.	Science Applications	Vought Aircraft Industries, Inc.
BAE Systems, Inc.	DynCorp International LLC	Harris Corporation	Natel Engineering Co., Inc.	International Corporation	White Electronic Designs Corporation
Barnes Aerospace	Eaton Aerospace Operations	HEICO Corporation	<i>National Machine Group</i>	Siemens PLM Software	WIPRO Technologies
B/E Aerospace, Inc.	EDS	Hexcel Corporation	<i>National Machine Company</i>	SITA	Woodward Governor Company
Belcan Advanced Engineering and Technologies	Elbit Systems of America	HITCO Carbon Composites	National Aviation Products, Inc.	SM&A	
The Boeing Company	Embraer Aircraft Holding Inc.	ITW Corporation	National Technical Systems		
Bombardier	Erickson Air-Crane Incorporated		Naverus, Inc.		
	ESI North America		The NORDAM Group		

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ADI American Distributors, Inc.	CDG	G.S. Precision, Inc.	Maine Machine Products Co., Inc.	Plexus Corporation	Sunshine Metals, Inc.
Aerospace Supply Chain	Celestica Corporation	H&S Swansons' Tool Company	McCann Aerospace Machining Corporation	Plymouth Extruded Shapes	SupplyScape Corporation
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Airfasc Industries, Inc.	Coalition Solutions Integrated, Inc.	HDL Research Lab, Inc.	Microsemi Corporation	Precision Tube Bending	TEK Precision Co. Ltd
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Albany Engineered Composites	Consolidated Precision Products	Aerospace Plating Company	Millitech, Inc.	PricewaterhouseCoopers LLP	Therm, Inc.
Alcoa Fastening Systems	Co-Operative Industries	Hi-Temp Insulation Inc.	Mil Spec Sales Co.	PRTM Management Consultants, LLC	TIGHTCO, Inc.
Allen Aircraft Products, Inc.	Defense, LLC	Hobart Machined Products, Inc.	Modern Industries	PTC	Tiodize Co., Inc.
Altemp Alloys, Inc.	CPI Aero, Inc.	Hughes Bros. Aircrafters, Inc.	Monogram Aerospace Fasteners	QMC LLC	TMX Aerospace
American Brazing	Crestwood Technology Group	Industrial Metals International LTD	Morris Machine Company, Inc.	Renaissance Services	Tri Polus Inc.
Arkwin Industries, Inc.	Crowell Solutions	Infotrust Enterprises America Inc.	Navigator Consulting, Inc.	Rubbercraft	TSI Group Inc.
Arrow/Zeus Electronics,	Cytec Engineered Materials	InfoTrust Group	New Breed Corporation	Schmiede Corporation	TTI, Inc.
<i>A Division of Arrow Electronics</i>	Data Conversion Laboratory, Inc.	Inmedius	Norfil Manufacturing, Inc.	SDL Xysoft	TTM Technologies, Inc.
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Astronautics Corporation of America	Dexter Magnetic Technologies, Inc.	TranscendData Division	Ohio Aerospace Institute	SEAKR Engineering	Unicircuit Inc.
ATC Aerospace	Electronic/Fasteners, Inc.	Intrepid Learning Solutions	Omnitrol Networks Inc.	Sechan Electronics, Inc.	University of Alabama in Huntsville
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California Manufacturing	Frontier Electronic Systems Corporation	Kubotek USA	Performance Software Corporation	Spincraft	Wind River Systems
Technology Consulting	Furniture Resources	Kulite Semiconductor Products, Inc.	Perillo Industries, Inc.	Spirit Electronics, Inc.	Windings, Inc.
Carlton Forge Works		LMI	PGM of New England, LLC	SPX Precision Components	X-Ray Industries
		Loos & Co., Inc.			Yarde Metals

## AIA LEADS INDUSTRY AIR SHOW EFFORTS



*Air Force Chief of Staff General Norton A. Schwartz recognizes the troops at the DoD corral at the Dubai Air Show.*

**B**ahrain, Malaysia, Romania, South Africa....the sites for international air and trade shows with an AIA presence are taking on an increasingly exotic flavor as new locales join established mainstays, such as Singapore and Farnborough.

In fiscal year 2010, AIA is supporting 17 air shows across the globe. Some, such as Aero Expo in Morocco and Farnborough International Air Show, will involve a full range of activities: a chalet for business networking, social events, Defense Department Operations and aircrew support as well as coordinating meetings between government and company officials. Some shows will see a smaller presence, but at all levels AIA has established a reputation as the ringmaster of international air shows.

How does all of this work? AIA looks to the Defense Department to identify which shows among the scores staged around the world each year are best to participate in from the standpoint of U.S. national security. With the International Exhibitions Committee at the forefront working with staff director Sherry Epperson, we determine the optimum level of AIA involvement.

One of the most popular events at the shows is the DoD aircraft corral, where equipment from fighter jets to helicopters, unmanned aerial systems and missiles are on display. Visitors typically include Congressional representatives, administration representatives, military dignitaries and officials from around the world. At the recent Dubai Airshow in November, for instance, we welcomed Air Force Chief of Staff General Norton A. Schwartz, Deputy Under Secretary of Air Force for International Affairs Bruce Lemkin, ambassador to the UAE Richard Olson and the U.S. ambassador to Kuwait, as well as several Kuwaiti government officials.

The military hardware in the air or on display at international air shows sends a clear message to our allies or foes: the United States military has the best equipment in the world. By providing an opportunity to showcase our capabilities, air shows help encourage our allies to “Buy American,” which builds interoperability in the field and ultimately reduces costs of the equipment.

For industry, as the international playing field levels off and U.S. budgets flatten, a global outlook for new business opportunities will continue to be attractive to companies of all sizes. ▼

AEROSPACE INDUSTRIES ASSOCIATION

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