

# The UPDATE Report



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## FAA Asks Repair Stations for Proof of Hazmat Training

The FAA has issued a Notice that requires inspectors to confirm that each repair station has up-to-date hazmat training records for its hazmat employees; this new focus on hazmat training records could spill over to affect distributors as well.

FAA Notice 8900.88 was issued August 20, and it directs FAA inspectors to obtain from each repair station a letter certifying compliance with the hazmat training rules. Domestic repair stations and repair stations in nations with a Bilateral Agreement (BASA/MIP) with the US are required to proffer such a letter by August 20, 2010. All other foreign repair stations will need to provide a certification letter upon their next renewal.

Don't be surprised if this round of repair station scrutiny leads to greater scrutiny of your operations by the repair stations with whom you do business!

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## Board of Director Election Results

ASA welcomes Graham Mitchell, Global Quality & Warehousing Director, Aero Inventory (UK) Limited, as a new member of the ASA Board of Directors. Robert (Bob) Hogan, Pratt & Whitney; Greg McGowan, Boeing Commercial Airplanes; and Roy Resto, Tracer Corp., were re-elected. ASA thanks all four men and their companies for their commitment to ASA and the industry.

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## MESSAGE FROM ASA'S PRESIDENT

### THE UPDATE REPORT

is the newsletter of the Aviation Suppliers Association.

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Dear Members,

With the ending of the 2009 election, ASA marks a changing of the guard. Long-time ASA Board member Mike Molli of Technitrade Inc. vacated his position on the Board of Directors. Mike was the last of the original ASA Directors; he was first elected in 1993. Throughout his 16 years on the Board, he worked with 27 different Directors. Mike brought his optimistic, honest, straightforward, humorous, genuine Midwestern approach to ASA discussions.

In the early years, Mike focused ASA on membership growth, international development, financial stability and the importance of a diverse mission. Mike brought a supply chain and operations background to the Board. Years ago, the Board took on the task of leading the membership development and Mike took to the phone and increased ASA's membership. Mike represented the first air carrier member and the first international member. ASA is a financially sound, robust organization due to Mike's leadership. With Mike's work in aviation, we know that he will continue to be an active member.

Each year, the Edward J. Glueckler Award is presented at ASA's Annual Conference in recognition of outstanding commitment, dedication, and contribution to the Association and the aviation industry. The 2009 recipient was Edward (Ed) Bayne of Boeing Commercial Airplanes. Ed has shown great leadership both within ASA and the industry as a whole. He has always been eager to share his expertise with the membership and others. I was pleased to honor him with this award and thank him for his involvement and service.

Please note ASA's fall training workshops, as we are once again bringing affordable training to you.

Take care,  
Michele

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ASA will be holding its last hazmat training for 2009 on October 27-28 in the Kansas City, MO area. The class is delivered by Jason Dickstein, and it is jointly offered to ASA, AEA and ARSA members. More information is available online at:

<http://www.dangerousgoodstraining.net> 

## Safety Management: The FAA Needs to Hear Your Voice!

The FAA is seeking preliminary comments on an anticipated Safety Management Systems rulemaking. This request was issued in the form of an ANPRM (Advance Notice of Proposed Rule Making) in the July 23 Federal Register. This represents an opportunity for the public to share ideas about safety management before the initial regulation has even been drafted.

For those unfamiliar with Safety Management Systems (or "SMS"), here is a short summary. A Safety Management System (SMS) is the formal process of using System Safety practices in an organization's everyday activities to control risk. It is like a quality assurance system, except it adds some new tools to help improve safety. Under a Safety Management System, there is a need to collect data and to use risk-based analysis to look forward, predict future safety needs and issues, and then commit resources today to address the future safety needs and issues.

SMS is an approach that can be used throughout the aviation industry to meet System Safety Standards set by the International Civil Aviation Organization (ICAO). ICAO is the part of the United Nations that helps to coordinate and harmonize aviation safety regulations throughout the world. ICAO has asked the world's national aviation authorities (the FAA in the United States) to implement regulations that require SMS programs and to establish State Safety Programs (State Safety Programs are risk-based analysis programs for national aviation authorities to use to better manage safety with the often-limited resources available to the national aviation authorities around the world).

As the program is currently envisioned, it would apply to airports, air carriers, repair stations and manufacturers. It is not anticipated that it would apply directly to distributors; however, past practice has shown that the quality and management paradigms that affect the regulated customers ultimately become part of the culture for the aircraft parts distribution community as well. We can also anticipate that the regulated community will be relying on distributors to assist them in collecting data to fuel the risk-based analysis anticipated by a robust SMS program. Therefore, it would be wise for distributors to weigh in now on what the final SMS program might be.

ICAO has published significant guidance on implementing SMS programs; so much guidance, though, that it must be reduced significantly to a

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## REGULATORY UPDATE

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level that will permit the publication of implementing regulations. In order to help the FAA make sense of what is necessary – and what is not necessary – within a SMS program, the FAA has issued the ANPRM in order to ask for industry’s opinions about some of the core elements of SMS. A primary focus of this ANPRM is on collecting data about existing SMS programs, but it would also be important for companies to share information about non-SMS programs that meet the same objectives as SMS programs.

Many ASA members have implemented robust quality systems that feature some element of risk-based analysis in order to better target quality assurance resources. This is the sort of infrastructure that would support a SMS program – so ASA member data and information about their implementation of quality data and risk-based analysis programs would be very useful to the FAA.

ASA members with comments to share about SMS should also forward copies of their comments to ASA headquarters so we can be sure that your comments and concerns are also addressed in ASA’s own comments on the SMS rulemaking project.

The ANPRM can be found online at <http://edocket.access.gpo.gov/2009/pdf/E9-17553.pdf>. The comment period is open through October 21, 2009. ASA’s General Counsel, Jason Dickstein, has been working on the SMS project and he serves on the FAA’s SMS Aviation Rulemaking Committee (ARC). 

## Repair Station Security Rules – Closer to Becoming a Reality

TSA is one step closer to issuing security regulations for repair stations. The draft notice of proposed rulemaking has been submitted to the White House Office of Management and Budget for review.

When Congress passed the Vision 100–Century of Aviation Reauthorization Act that new law required TSA to issue “final regulations to ensure the security of foreign and domestic aircraft repair stations” by August 8, 2004. The purpose of these regulations was to ensure that all repair stations would have security programs to prevent terrorists from using them as a means to sabotage aircraft. TSA did not meet that Congressional deadline for issuing the new repair station security rules.

Congress tried to motivate TSA to act on repair station security by setting a new deadline in the 9/11 Commission Act. That Act required that the final rule on repair station security be issued by August 3, 2008. TSA did not meet that deadline, either.

But it appears that TSA is finally putting out the long-awaited repair station security rules as a notice. The

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# REGULATORY UPDATE

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notice of proposed rulemaking (NPRM) was submitted to the White House Office of Management and Budget on August 25 for a ninety-day review period. This means that the proposed repair station rule could be out in December (or even as early as Thanksgiving), although a January release might be more realistic. Once the notice is released to the public, the public will have an opportunity to comment on it.

You can find status information on the notice of proposed rulemaking on the government's REGINFO website at: <http://www.reginfo.gov/public/do/eAgendaViewRule?publd=200904&RIN=1652-AA38>



## Foreign Repair Stations: Equal Pain Plan

The House has passed language requiring the FAA to audit foreign repair stations at least twice per year, and the Senate continues to consider the same idea. But what does this mean to US repair stations? And what might it mean to the distributors who rely on repair stations for overhaul of parts?

ASA members who rely on repair stations for overhaul often prefer to obtain maintenance release tags indicating that the overhaul was performed in accordance with more than one authority's rules. This expands the range of customers to whom the part can be sold. For example, a part that is overhauled and appropriately tagged by a repair station holding both FAA 145 and EASA 145 approvals can be sold in both the US and European markets (as well as any other market that will accept either US or European maintenance certifications).

Thus, anything that affects a repair station's ability to issue dual-certification overhaul tags can affect the distribution community.

There has been a lot of debate in the United States about whether our trading partners would engage in reciprocal behavior if the United States passes legislation requiring semi-annual audits of foreign repair

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stations. Congressman Oberstar gave a speech several months ago in which he assured Americans that there would be no reciprocity. But it appears that he cannot speak for the Europeans. In a June 5 letter, Daniel Calleja, the EC Director of Air Transport, asked EASA to develop a plan to ensure that Europe will be “reciprocating in full.” EASA, in turn, has developed a reciprocal plan for semi-annual audits of EASA-accepted repair stations in the United States. The plan has an implementation date of July 2010.

What this means for US repair stations is that in addition to paying €750 for their annual renewal, they will also pay the costs associated with the actual audits – some pundits are estimating that this could mean an additional \$30,000 per year, although the actual cost may depend on how EASA implements the plan, and how many US repair stations choose to maintain their EASA 145 privileges. One idea being discussed at EASA would be to establish a US office to perform oversight of the 1,233 EASA-accepted repair stations in the United States.

This is an issue that ASA members will want to watch, because if dual-certified repair stations become rarer, and start to experience higher costs, then this will make it more expensive to obtain overhauls that are released under both FAA and EASA regulations.



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## What are “Current” Maintenance Instructions

A recent FAA legal memorandum has shocked certain parts of the industry. It addresses the question of what constitutes “current” documents from a manufacturer.

The memorandum defined what the regulations mean when they call for a “current” document from the manufacturer. The phrase arises in the context of section 91.409(f)(3) of the regulations, which permits an operator to rely on “the current inspection program recommended by the manufacturer.” The Chief Counsel’s memo examined whether this phrase means that the operator’s inspection program must reflect all manufacturer amendments, to date.

The Chief Counsel’s memo makes it clear that this phrase means the program at the time it was initially published and it DOES NOT include the subsequent amendments to the program. The Chief Counsel’s memo offers the following explanation:

“If ‘current’ in § 91.409(f)(3) and similarly worded regulations could be read to mean an ongoing obligation, manufacturers unilaterally could impose regulatory burdens on individuals through changes to their inspection programs or maintenance manuals. In

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essence, they would be making rules that members of the public affected by the change would have to follow....

“If the word ‘current’ in § 91.409(f)(3) and other similarly worded provisions did mean an ongoing obligation, when manufacturers make changes to their instructions and programs (which often accompany newly-produced models of products, but which also cover the previously-produced models), the new requirements could impose financial and other burdens on owners and operators of older aircraft that they did not bargain for. An interpretation of the regulation that would allow manufacturers unilaterally to issue changes to their recommended maintenance and inspection programs that would have future effect on owners of their products would not be legally correct. This would run afoul of the APA. It would mean that our regulations effectively authorize manufacturers to issue ‘substantive rules,’ as that term is used in the APA, i.e., it would enable them to impose legal requirements on the public. This would be objectionable for at least two reasons. First, and most significantly, the FAA does not have authority to delegate its rulemaking authority to manufacturers. Second, ‘substantive rules’ can be adopted only in accordance with the notice-and-comment procedures of the APA, which does not apply to manufacturers.”

Because the manufacturer does not have the authority to impose a regulatory obligation, and the FAA may not delegate to the manufacturer the authority to impose a regulatory obligation in the absence of rulemaking, only the inspection program that was current at the time of initial certification may be considered to be “current.”


The memo makes it clear that any update to the program may be voluntarily adopted by the operator, but that such updates are not necessary in order to be using the “current” inspection program.

There is an obvious parallel between this use of the word “current” and the concept of the current manual used by a repair station to perform an overhaul. FAA inspectors have long interpreted the regulations to mean that a repair station has to have all of the updates to the manual – this recent opinion suggests that such an interpretation may not be appropriate.

This opinion has caused consternation among people who fear that it could permit use of inspection programs that are considered ‘outdated.’ But it has been applauded by some who fear that certain manufacturers have used maintenance manuals as a means to help control the repair market.

There are a number of important ramifications to this opinion. First, it illustrates the importance of coordinating maintenance instructions with your repair vendors to ensure they are using the instructions that apply; but more importantly, it raises a question about what constitutes “current” maintenance instructions when a repair station overhauls parts for a distributor or an air carrier.

14 C.F.R. § 145.109(d) requires that the repair station maintain current copies of several documents, including ICA and other maintenance manuals. This has traditionally been thought to mean that the repair station is responsible for maintaining a subscription or other service for obtaining all of the manufacturers’ revisions to their manuals. But using the logic of the recent Chief Counsel’s Opinion, it would appear that the FAA might only have the power to require a repair station to maintain the original manual, and any changes to the manual that have been required by Airworthiness Directive.

Whether this opinion applies to the maintenance manuals and other documents is an issue to be addressed in another FAA Chief Counsel’s Opinion letter, but the direction of the Chief Counsel is clear; and it is likely that the FAA is going to find itself struggling to develop a regulatory structure that lets it enforce a requirement to maintain manufacturer’s amendments under the term “complete.” 



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## FAA Proposes Mechanism for Distinguishing Major Type Design Change from Minor

The FAA has proposed a new mechanism for distinguishing major changes in type design from minor changes to type design. This affects distributors who are supporting design change projects, and who are providing alternative parts to their customers, because a major change in type design must be substantiated and approved through a supplemental type certificate (STC), while a minor change does not require an STC. The proposed advisory circular is available for review online:

[http://www.faa.gov/aircraft/draft\\_docs/media/Draft%20AC%2021.93%208-6-09.doc](http://www.faa.gov/aircraft/draft_docs/media/Draft%20AC%2021.93%208-6-09.doc)

The fundamental difference between major changes in type design from minor changes to type design is described in 14 C.F.R. 21.93(a), which states:

(a) In addition to changes in type design specified in paragraph (b) of this section, changes in type design are classified as minor and major. A “minor change” is one that has no

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# 2009 Hazmat Training



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### *Why should I attend ?*

The U.S. Department of Transportation (U.S. DOT) requires that all individuals engaged in handling hazardous materials must be trained at least once every 3 years. Air Carriers are required to be trained annually, and IATA requires training every 2 years.

This course will focus on shipments of Dangerous Goods under the IATA Dangerous Goods Regulations (a field manual that includes the ICAO technical instructions). This course will also address matters arising out of United States' regulations that are not covered by IATA.

All attendees receive a Certificate of Training stating 49 CFR 172 Subpart H training requirements have been met (upon successful completion of all attendance and testing requirements).

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appreciable effect on the weight, balance, structural strength, reliability, operational characteristics, or other characteristics affecting the airworthiness of the product. All other changes are “major changes” (except as provided in paragraph (b) of this section).

Notice that the existing language of 21.93 does NOT impose a burden to identify whether a proposed change is a major or minor change to type design. This is important to notice because the proposed AC imposes such a burden. While affirmative classification of minor changes can aid in compliance, it is not a current requirement of the regulations.

There has been considerable debate over the years about the difference between major and minor, and about the scope of the word “appreciable” as it has been used in the distinction between major and minor. In fact, the final report of the ARAC major-minor committee admitted in 2001 that the current regulatory language does not adequately distinguish major from minor in a manner that provides the public with objective standards.

The FAA proposal does not define the term “appreciable” nor attack the major-minor issue from any traditional angle – instead it provides a mechanism by which would-be STC applicants may confirm that their proposal represents a major change to type design by relying on system effects analysis. In this sense, it is a refreshing new approach in that it proposes an analysis tool instead of seeking to provide a new definition of the distinction between major and minor. Nonetheless, there are some problems with the draft.

A problem with the proposal is that it appears to impose a new burden to perform an analysis and affirmatively determine that a minor change to type design is, in fact, minor. This is a potential problem for the ASA members who supply alternative parts to a customer, because seemingly minor alternatives would need to be analyzed using system effects analysis, despite the fact that the alternative part may be obviously minor in its effect on “the weight, balance, structural strength, reliability, operational characteristics, or other characteristics affecting the airworthiness of” a product.

The current language of the proposed AC would seem to require a systems analysis (or other analysis previously found “acceptable” to the FAA) that confirms the fact that a small, non-complex and non-safety-sensitive alternative part may clearly have no appreciable effect on weight, balance, structural strength, reliability, operational characteristics, or other characteristics affecting the airworthiness of a product. This appears to be wasteful of resources in such cases, where a change is obviously minor, and it belies current industry practice, in which a manufacturer’s part number change may signal a mere change in vendor, and the change may be poorly documented in current versions of the manuals and catalogues.

Comments on the proposed draft are due October 10, 2009. There are several ways to comment on the proposed Advisory Circular:

**Email comments to:** [9-AWA-AVS-Draft-AC-21-93@faa.gov](mailto:9-AWA-AVS-Draft-AC-21-93@faa.gov)

**Deliver comments by mail or hand to:**

Sarbhpreet S Sawhney  
Aircraft Certification Service  
Aircraft Engineering Division  
Certification Procedures Branch – AIR-110  
950 L’Enfant Plaza SW, 5th Floor  
Washington, DC 20024

**Fax comments to:** 202-385-6475



# Future GPS Service May Be In Peril, GAO Warns

In a report issued April 30, the Government Accountability Office (GAO) warned that the Air Force's struggles to build Global Positioning System (GPS) satellites on time may lead to an interruption in the current level of GPS service by 2010. An inability to maintain the current level of GPS service would affect both civilian and military users. The Air Force is in charge of the GPS and is currently attempting to modernize the system.

The current Air Force IIF satellite program is scheduled to launch its first satellite three years later than initially planned (in November 2009). Additionally, the IIF program has already exceeded its estimated cost by a whopping \$870 million. As the satellites necessary for the GPS age and begin to fail, the successful launch of new satellites is crucial to maintain the current level of GPS service.

While the Air Force is working on structuring a new GPS IIIA program that would deploy satellites three years faster than the old IIF program, the GAO reports that this quicker schedule is "optimistic" based on past trends and other data. The GAO found that if the Air Force is unable to meet the faster IIF satellite deployment goals, there is an increased likelihood that number of operational satellites in 2010 will fall below the number

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necessary for the level of GPS service the US currently provides, and to which the US government commits.

The GAO report also criticized the Air Force’s inability to completely synchronize the modernized GPS satellites with the user equipment and ground control they interface with, leaving military users unable to utilize some next generation satellite capabilities in a timely manner.


Another matter for concern, in light of the potential future issues with the GPS, is the de-funding of the Long Range Aids to Navigation (LORAN-C) Program. Traditionally, the LORAN-C Program serves as the back-up to GPS. Currently, LORAN-C provides navigation, location, and timing services for air, land, and marine users. However, the President’s Fiscal Year 2010 budget calls for the termination of LORAN-C, to result in a monetary offset. The Coast Guard’s website indicates only that the Coast Guard “will continue to operate the current Loran C system through the end of FY2009 and is preparing detailed plans for implementing the FY2010 Budget.”

To see the GAO report on GPS, visit:  
<http://www.gao.gov/products/GAO-09-325>. 

## ASA’s Conference: A Wealth of Ideas

ASA enjoyed one of its best Conferences ever, with high marks and praise from all of this year’s attendees.

With separate educational tracks covering quality, business, and legal issues, and plenty of networking time among distributors and their customers, this Conference had something for everyone.

The remainder of this issue of the Update Report provides some of the key facts and figures discussed in some of the general sessions during the Conference (the break-out sessions were too numerous to address them all). 

## Quattrocchi Says “Stay Close to Your Customers and Invest in Tomorrow”

Lou Quattrocchi, Pratt & Whitney’s Vice President of Commercial Engines & Global Services Materials Management, opened the Conference as ASA’s keynote speaker. He pointed out that the challenging times represent an opportunity to support the customer base.

Pratt & Whitney has been in business since 1925 and has grown to become a \$13 billion company. They provide a wide range of thrust, from 1,000 lbs to 1,000,000 lbs of thrust. They bring a broad portfolio of solutions to meet their customers’ needs. Quattrocchi explained that Pratt & Whitney is the exclusive engine provider for the new Mitsubishi regional jet coming to market in 2013 – that aircraft will use the new geared-fan turbine PW1000G. He estimates that if the entire world was relying on this technology, that we would save a billion pounds of CO2 emissions per year.

Quattrocchi explained that it is important to plan for customer demand through supply chain management. Pratt & Whitney maintains product life cycle models to assist in planning and forecasting to better support the customers.


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Pratt & Whitney expects its own suppliers to assist in providing complete life-cycle support for their engines. They expect perfect quality, on-time delivery and a fair price, but they also look for a partner with flexibility in order to be able to continue meeting the changing needs of the evolving customer base.

Quattrocchi described Pratt & Whitney partnership with Aviall – Aviall is their exclusive distributor of JT9D material. This has permitted Aviall to bundle aircraft and engine parts packages where customers need them in order to provide whole-aircraft parts support.

Pratt & Whitney has established a Supplier Gold Program, which tracks supplier performance metrics and recognizes suppliers that are able to achieve certain metrics, like 100% quality, 100% on-time delivery and a high level of customer satisfaction for the past 12 months.

Quattrocchi advised the audience to stay close to their customers, to find ways to add value to the customer, and to invest in tomorrow. 

## Thousands of Aircraft Will Be Retired

Martin Fraissignes, who created the Châteauroux Air Center in 2001 in Châteauroux, France, is currently the Executive Director of the Aircraft Fleet Recycling Association (AFRA). AFRA is an international association with 41 members coming from 10 nations.

At the ASA Conference, Fraissignes discussed the AFRA mission, which is to help improve safety and environmental responsibility at the time that aircraft are disassembled. One of AFRA's related aims is to increase the quantity and quality of raw materials that are available for recycling, by improving disassembly practices.

Fraissignes estimates that 12,000 to 15,000 aircraft will be retired and recycled over the next 20 years. There are aircraft all over the world, waiting to be recycled. In order to support these efforts, AFRA is creating and publishing Best Management Practices (BMP) documents designed to guide companies in methods for parting-out aircraft in a manner that protects the safety of the existing fleet, while also maintaining acceptable levels of environmental responsibility during the disassembly process.

The AFRA BMP on the disassembly of aircraft is currently available online at <http://www.afraassociation.org>. 

## The Future of Aircraft; and Their Parts

Randy Tinseth, Vice President of Marketing, Boeing Commercial Airplanes, discussed fleet development and evolution at the ASA Conference. He focused on the rate of growth of aircraft traffic, and how that growth will be accommodated by the customers' fleets. This is a more complicated analysis than it may sound. Aircraft traffic growth is a function of economic growth, which is particularly difficult to predict in the current economy. Fleet configurations are influenced by new technologies, which cannot always be accurately foreseen.

According to Tinseth, smaller regional jets do not seem to have a robust future. Smaller jets are giving way to larger single-aisle jets; and shorter routes are often more efficiently served by turboprop aircraft which provide greater fuel efficiency over such routes.

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Despite the current economical situation, Boeing is predicting strong average growth over the next twenty years. Based on growth estimates and fleet usage requirements, Boeing estimates that the industry will need 29,000 new aircraft over the next 20 years. This reflects \$3.2 trillion worth of aircraft!

While the North American market is the largest current market for aircraft, it is a stable market that is expected to grow at a rate of about 2% per year. The Asia-Pacific market is a much faster-growing marketplace, and it is expected to become the top marketplace for new aircraft over the next twenty years.


Economic and environmental obsolescence can influence an aircraft's life-span. Some aircraft are being forced out of the fleet prematurely because they do not meet the industry's current needs for fuel efficiency. This creates additional need for new, fuel-efficient aircraft.

Aircraft retirements seem to be stabilizing, with passenger aircraft expected to have useful lives of 23 to 25 years, and cargo aircraft having useful lives of 33 to 37 years. Using these figures, Boeing has estimated that 5,900 aircraft will leave service by 2018. Half of these will be single-aisle passenger aircraft, like the 737 classic airplane.

With these fleet retirements, Boeing has been thinking hard about what happens to aircraft when they reach the end of their life-cycle. End-of-service does not necessarily mean end-of-use. That is why Boeing helped found AFRA, in order to increase the recyclability of aircraft in a manner that is both safe and environmentally responsible. One of their goals is to see up to 95% of the aircraft be recyclable by 2016.

Tinseth described the factors that affect the value of an aircraft being considered for disassembly. He noted that these factors include the value of the parts and materials on the aircraft, and also the asset value of the aircraft. If an aircraft continues to have a high asset value then it is possible that it may have to be "parked" for awhile in order to permit it to be depreciated, so that the asset value that is "written-down" at the time of disassembly is not overly large. If the asset value is inflated, then disassembling the aircraft could result in a "hit" on the company's book value based on the loss of apparent value associated with the aircraft, even though disassembling an unused asset really results in additional value because of the ability to sell the parts and materials.

In response to queries from the audience, Tinseth predicted that composites will be the future of the aviation industry. He explained that when you look at the material characteristics of composites, like durability and corrosion resistance, composites demonstrate clear advantages over traditional materials.

Tinseth stressed that economic growth will return – and that it is important that the industry be positioned to take advantage of the growth in a responsible and safe way. 

## Thriving as a Supplier in the Latin American Market

Marco Peggia joined the ASA Conference this year to discuss strategies for working in the Latin American market. Peggia is the Supply Chain Director of TAM Airlines, and he also serves as the President of CCMA.

Peggia explained that Brazil and TAM have enjoyed a great deal of recent success. Brazil's market growth has been torrid, with 12% growth in 2006 and 2007. Brazil's market growth has continued to grow, despite the global economic downturn, albeit at a lower rate (7% in 2008 and 2% through May 2009). TAM continues to enjoy success; the international market from Brazil decreased 7% but TAM's international business grew 14%.


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TAM is looking for suppliers who can make parts available, provide fast and reliable response, can meet turn-around time obligations, and can provide a professional and ethical relationship.

Peloggia explained that most suppliers working with TAM assign a Spanish speaker as the primary point of contact. While this is appreciated, this is not always the right solution if the Spanish speaker cannot provide the answers that TAM needs. He explained that the point of contact should be someone who can communicate intelligently with the air carrier about the carrier's needs.

Peloggia cautioned that Latin American carriers are looking for fair market prices and reasonable payment terms. They often need their suppliers to offer fair credit terms [see the [Ex-Im](#) article in this issue for tips on how to safely offer credit terms]. Lead times have emerged as a significant issue in obtaining supply, and therefore timeliness of supply will be a more important metric for Latin American carriers in the future. Similarly, TAM has experienced companies that miss firm delivery dates, or expected repair turn-around times; missing such agreed-upon deadlines reflects very negatively on the supplier.

Companies that want to do business in Latin America need to take the time to understand the differences among the companies, and among the countries. Different carriers have different commercial expectations. But more importantly, different nations have different import expectations and different documentation requirements. An understanding of the carrier as an individual customer is important to successful business in Latin America. 


## How Has the Economy Changed the Outlook for Aircraft Parts?

Mike Howard of Aerostrategy discussed the changed outlook for aircraft deliveries. Aircraft deliveries appear to be down at least 15% and perhaps down as much as 20-25%. As a consequence the total growth rate is down about 18%. The 2008 forecast was about \$44 billion, but that is expected to contract to \$41.8 billion in 2009. Aerostrategy feels that we have lost three years of growth in the marketplace, and we won't reach 2008 spending levels again until 2011. The MRO market will likely recover early in the next decade, increasing to \$55 billion annual spending by 2018.

China and India will continue to be tremendous growth areas over the next decade. The Asia-Pacific market is a major growth market and it will become a third major aerospace market, alongside North America and Europe.

Aerostrategy predicts that growth in the PMA market will bifurcate. Airframe and component PMA markets are expected to experience robust growth. Major component support vendors have embraced PMA use, and this is recognized as a safe way to reduce costs while still being able to rely on FAA approval as the airworthiness basis for the parts.

Howard suggests that to fully understand the PMA market, though, you need to break-out the engine, airframe, component and line-replaceable unit PMAs into separate markets. Aerostrategy expects tremendous growth in the airframe PMA and component PMA markets; but Aerostrategy feels that the anti-PMA strategy being used by engine type certificate holders will likely have a depressing effect on the growth of engine PMA parts utilization.

Howard also predicted that political backlash to "offshore maintenance" could slow the pace of globalization. Congressional action affecting foreign repair stations could impact the growth patterns of the maintenance community. But no matter how those growth patterns are altered, it is still the case that the MRO market continues to grow. Short-term contraction will give way to long-term growth. 

## Ex-Im Bank: Guarantee Your Export Receivables!

ASA members from the United States who are looking for ways to safely expand their international business welcomed Sharyn Koenig of the Export-Import Bank at the ASA Annual Conference. Koenig, in turn, delighted the audience with a discussion of programs designed to inexpensively insure export receivables to help assure that US exporters will get paid.

Koenig explained that the Export-Import Bank is an independent federal agency that was established in 1934 to promote export of US made goods and services. Their ultimate strategic goal is to create and sustain US jobs.

The Export-Import Bank provides short term accounts receivable financing. This helps to guarantee that the company will ultimately get paid for its exports, and this also allows a company to offer favorable credit terms to its non-US customers, with the knowledge that the Export-Import Bank insurance program will protect the exporter.

The small business policy provides 95% coverage for both commercial and political risk, with no deductible and premiums based on (1) your credit terms, (2) the value of receivables insured, and (3) the nature of the buyer/importer (receivables from government buyers are less expensive to insure than private sector receivables). Thus, if you obtain insurance on \$100,000 in export receivables, and the buyer defaults, then the insurance recovery would be \$95,000. This is a cost-effective way to ensure that your business gets paid when dealing with a non-US customer.

To qualify, exports must be US-based and have a majority of US content. Because their ultimate strategic goal is to create and sustain US jobs, economic impact on US markets is a concern, and it is possible that the Export-Import Bank may reject certain projects that support foreign competitors, like a project that would provide significant support to foreign-produced aircraft.

The Export-Import Bank is very supportive of small businesses. Last year, 84% of all Export-Import Bank transactions supported small business exports.

The Export-Import Bank also assists in helping companies obtain loans to obtain exportable materials from US sources. Such loans are often collateralized by the export goods and the related future receivables, so that the borrower may be able to obtain a loan even if the borrower does not have significant assets to use as collateral. This can serve as a ready-source of collateral to a distributor seeking to take on a new line of parts for the purpose of supporting a foreign air carrier. Koenig stressed the fact that even when the banks are not lending, the Ex-Im bank is securing loans for its customers!



## Leadership and Communications in Stressful Times

Dr. Richard Levin spoke to the 2009 ASA Conference about leadership and communications during stressful times.

He began with a discussion about ways that we are moving quickly – perhaps too quickly – in our lives. The University of Maryland has completed a study showing that people are going to bed earlier and waking up earlier in order to get an early start on their day. This has resulted in rush hours being incremented earlier. But the rush hours still exist. A study of the Texas Transportation Institute shows that people are reading, talking on the phone, getting emails, shaving, putting on make-up, doing their hair and even getting dressed while they are driving.

This trend has become known as “continuous partial attention.” An example of this arises in meetings where

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people are sending e-mails while also listening to the meeting. This has resulted in continuous channels of open communication, and the media is eager to fill these communications channels. Competition for communications attention is fiercer than ever, which means that executives need to carefully project themselves as good corporate citizens, and strive to project an accurate image, in order to avoid being mischaracterized by the media despite the business' best efforts to do well.

At no other time in modern history have we been more besieged by change, economic challenges and the demands of a fast moving society. There is no question that speed is a competitive advantage. But keep in mind that "fast" is not always about watching the clock. Sometimes "fast," means acting on opportunities decisively, predicting changes, and anticipating the need for change before your market tells you that you have to change.

Resilience is the modern management buzzword. Resilience is about how quickly you bounce back from stress and setbacks, and how well you cope with the demands of a 24/7 society in which we are being asked to do superhuman things. Building resilient organizations is not an individual task. It requires you to discard the leadership paradigms of the past, and to consider collective effort in order to increase the flexibility of the organization.

Dr. Levin explained that we need to be aware of time as something that we invest in. Rather than living our lives at the speed of time, we need to live in the moment, and learn to enjoy and appreciate time as part of a community. When we can view time as something precious but not as something we measure then we will all enjoy our lives much more. 

### FAA Has Released New Documents

The FAA has released new UPNs. Below is a list of companies associated with the UPN. Click on each company name below to read more. [CLICK HERE](#) for a link to the FAA homepage regarding all UPNs.

#### Acme Components Company

[http://www.faa.gov/aircraft/safety/programs/sups/upn/media/2009/upn\\_2007-00141.pdf](http://www.faa.gov/aircraft/safety/programs/sups/upn/media/2009/upn_2007-00141.pdf)

#### Chatsworth Rubber

[http://www.faa.gov/aircraft/safety/programs/sups/upn/media/2009/upn\\_2006-00012.pdf](http://www.faa.gov/aircraft/safety/programs/sups/upn/media/2009/upn_2006-00012.pdf)

#### Elliptical Systems Inc. & Avia-Dynamics Corp.

[http://www.faa.gov/aircraft/safety/programs/sups/upn/media/2009/upn\\_2007-00016.pdf](http://www.faa.gov/aircraft/safety/programs/sups/upn/media/2009/upn_2007-00016.pdf)

#### Plymouth Tube Company

[http://www.faa.gov/aircraft/safety/programs/sups/upn/media/2009/upn\\_2009-20080716034.pdf](http://www.faa.gov/aircraft/safety/programs/sups/upn/media/2009/upn_2009-20080716034.pdf)

**CALENDAR OF EVENTS!**

**Industry Events**

November 11-12, 2009 ..... **AMUSA Expo**  
Hollywood, FL

**Workshops**

October 27-28, 2009 ..... **HAZMAT WORKSHOP**  
Kansas City, MO

November 10, 2009 ..... **REGULATORY WORKSHOP**  
Hollywood, FL

November 12, 2009 ..... **EXPORT WORKSHOP**  
Newark, NJ

November 18, 2009 ..... **REGULATORY WORKSHOP**  
Seattle, WA

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