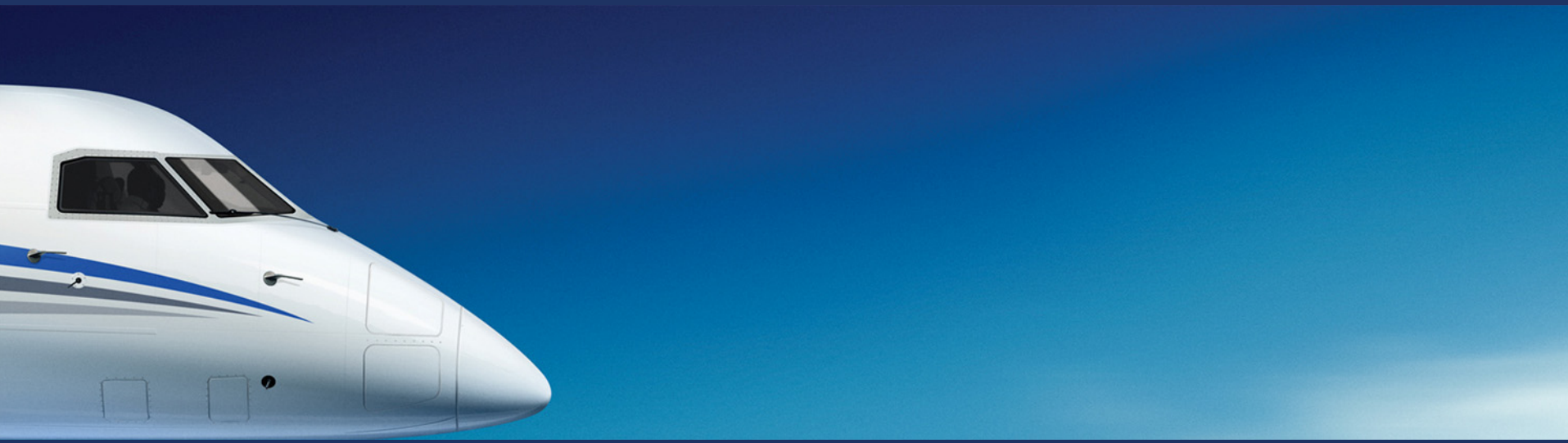
# Presentation to Investors, Financial Analysts and Media
# NBAA 2009

***October 20, 2009***



**Guy C. Hachey - President and Chief Operating Officer, Bombardier Aerospace**
**Steve Ridolfi - President, Bombardier Business Aircraft**
**James Hoblyn - President, Customer Services & Specialized and Amphibious Aircraft**

# Forward-looking statements

This presentation includes forward-looking statements**.** Forward-looking statements generally can be identified by the use of forward-looking terminology such as “may”, “will”, “expect”, “intend”, “anticipate”, “plan”, “foresee”, “believe” or “continue” or the negatives of these terms or variations of them or similar terminology. By their nature, forward-looking statements require Bombardier Inc. (the “Corporation”) to make assumptions and are subject to important known and unknown risks and uncertainties, which may cause the Corporation’s actual results in future periods to differ materially from forecasted results. While the Corporation considers its assumptions to be reasonable and appropriate based on current information available, there is a risk that they may not be accurate. For additional information with respect to the assumptions underlying the forward-looking statements made in this presentation, please refer to the respective sections of the Corporation’s aerospace segment (“Aerospace”) and the Corporation’s transportation segment (“Transportation”) in the F09 MD&A.

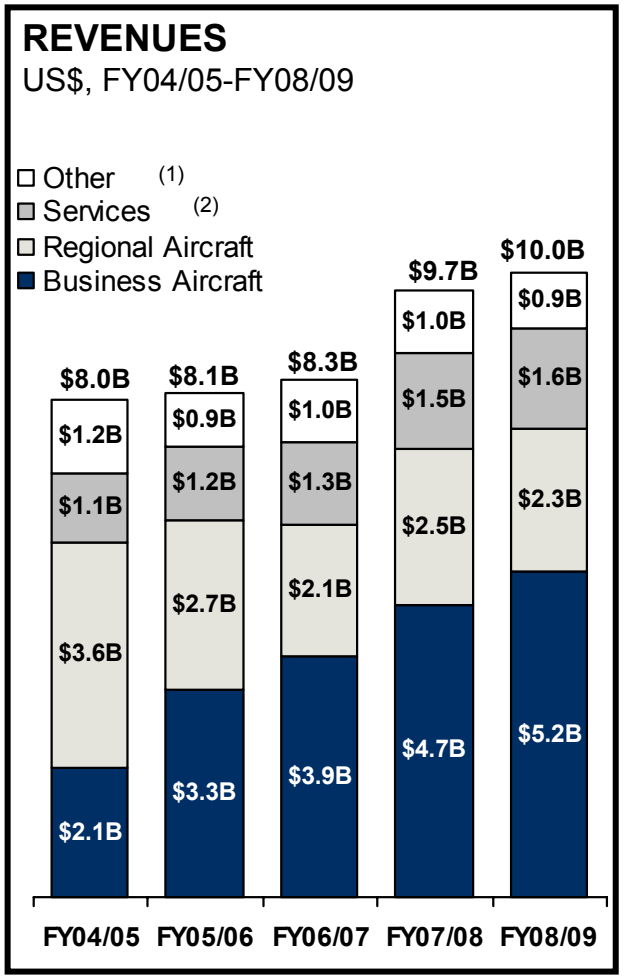
Certain factors that could cause actual results to differ materially from those anticipated in the forward-looking statements, include risks associated with general economic conditions, risks associated with the Corporation’s business environment (such as the financial condition of the airline industry, government policies and priorities and competition from other businesses), operational risks (such as regulatory risks and dependence on key personnel, risks associated with doing business with partners, risks involved with developing new products and services, warranty and casualty claim losses, legal risks from legal proceedings, risks relating to the Corporation’s dependence on certain key customers and key suppliers, risks resulting from fixed-term commitments, human resource risk, and environmental risk), financing risks (such as risks resulting from reliance on government support, risks relating to financing support provided on behalf of certain customers, risks relating to liquidity and access to capital markets, risks relating to the terms of certain restrictive debt covenants and market risks (including currency, interest rate and commodity pricing risk) – see the Risks and Uncertainties section in the F09 MD&A. Readers are cautioned that the foregoing list of factors that may affect future growth, results and performance is not exhaustive and undue reliance should not be placed on forward-looking statements. The forward-looking statements set forth herein reflect the Corporation’s expectations as at the date of this presentation and are subject to change after such date. Unless otherwise required by applicable securities laws, the Corporation expressly disclaims any intention, and assumes no obligation to update or revise any forward-looking statements, whether as a result of new information, future events or otherwise.

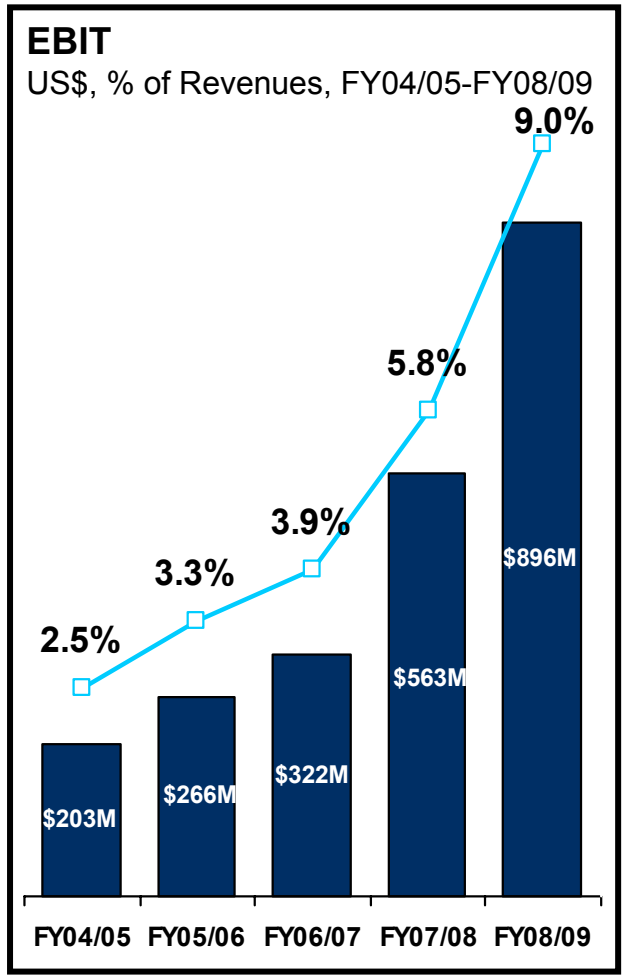
# Executive Summary

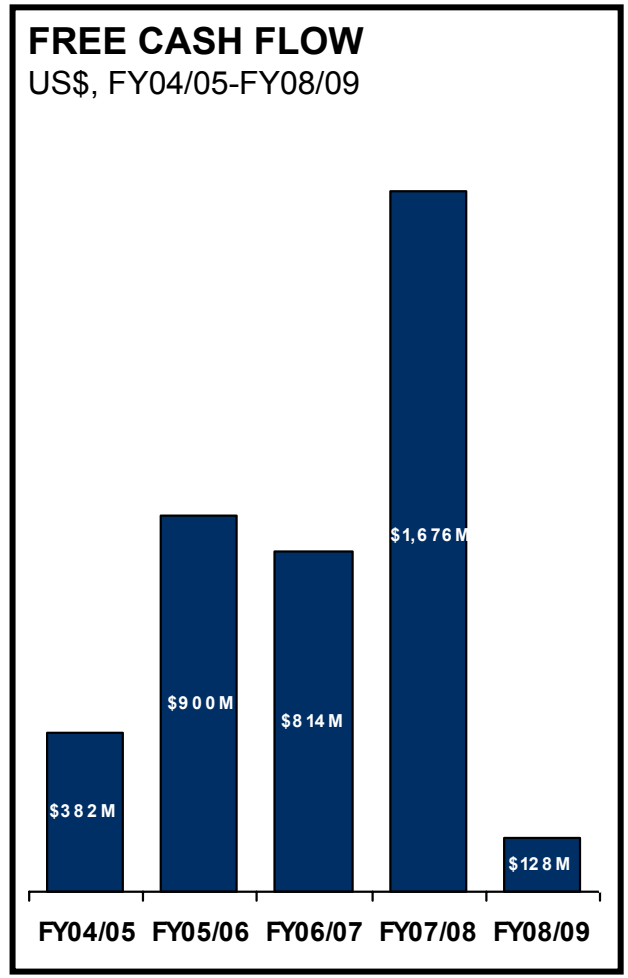
| | |
|---|---|
| **Bombardier Aerospace** *(Guy C. Hachey)* | ▪ Global economic recession is impacting orders and book-to-bill ratio<br>▪ Backlog provides protection to short term cancellations and deferrals<br>▪ Bombardier Aerospace Enterprise Strategy is guiding our actions<br>▪ Continuing to invest in the future |
| **Bombardier Business Aircraft** *(Steve Ridolfi)* | ▪ Long-term fundamentals remain solid and expansion into new segments and geographies suggest a positive long-term outlook<br>▪ Focus is on building on leadership position with new and innovative products |
| **Bombardier Customer Services** *(James Hoblyn)* | ▪ Keep strengthening services & support<br>▪ Build international service & support capabilities<br>▪ Develop innovative fleet management solutions |

# Bombardier Aerospace has improved its performance over the last few years

## BOMBARDIER AEROSPACE FINANCIAL RESULTS




(1) Other includes primarily other manufacturing (eg, Amphibious, sub-contract) and pre-owned aircraft sales
(2) Services include Services (ie, non-manufacturing) and Flexjet service revenues

Source: Bombardier Annual Reports

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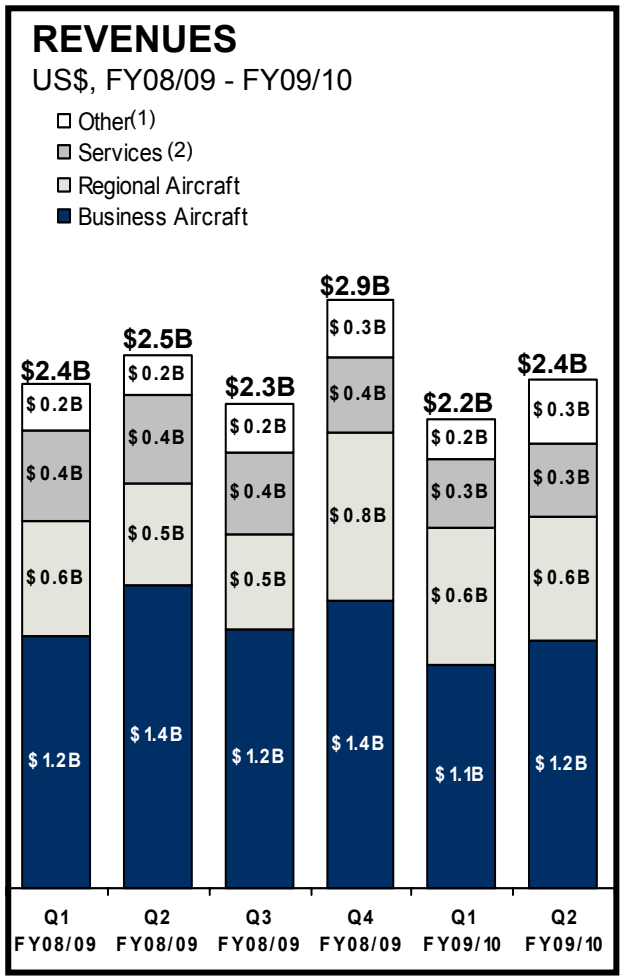
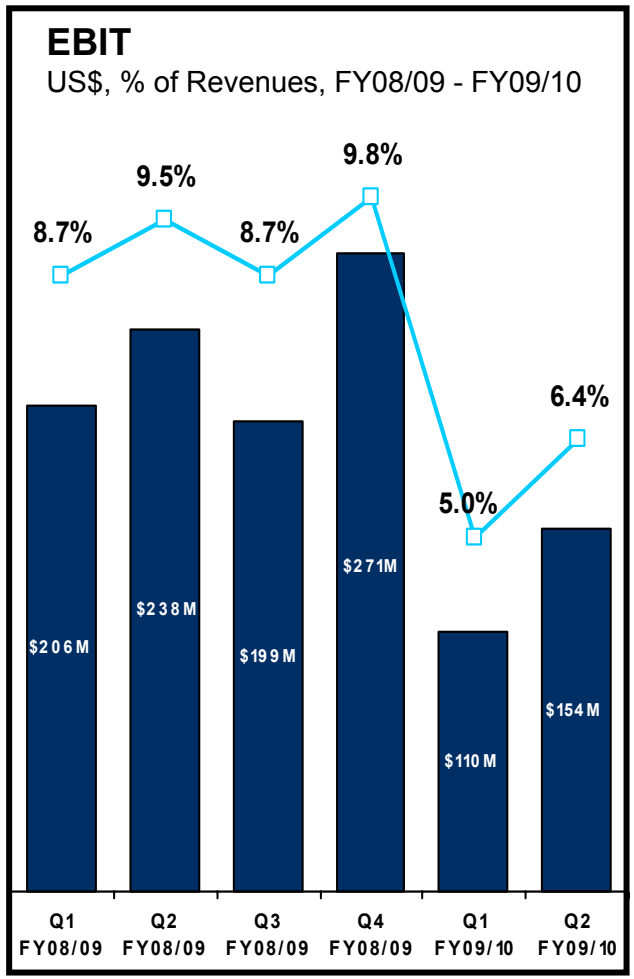
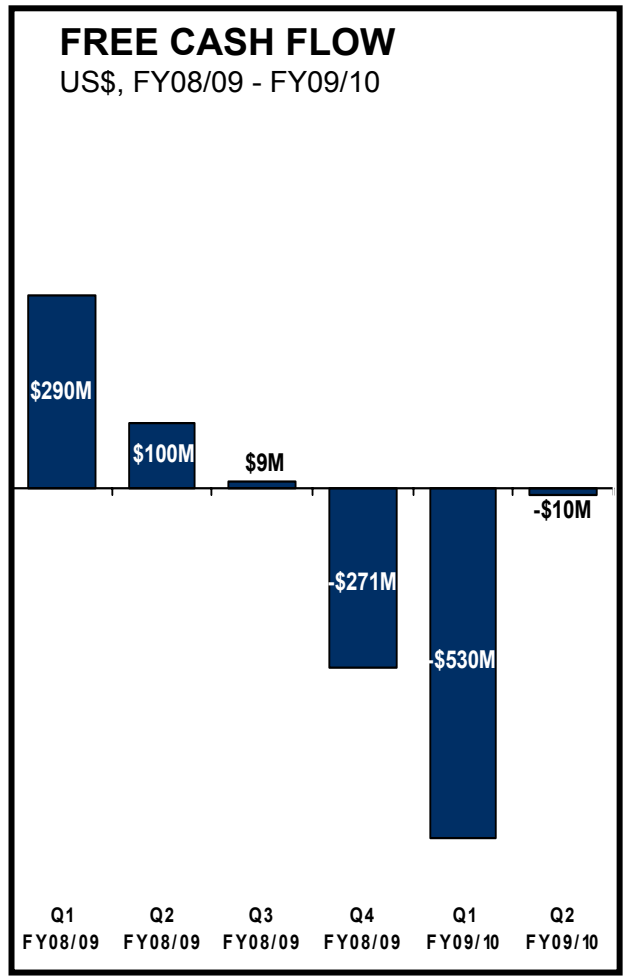
# However recent quarters have demonstrated the difficult economic climate

## BOMBARDIER AEROSPACE FINANCIAL RESULTS

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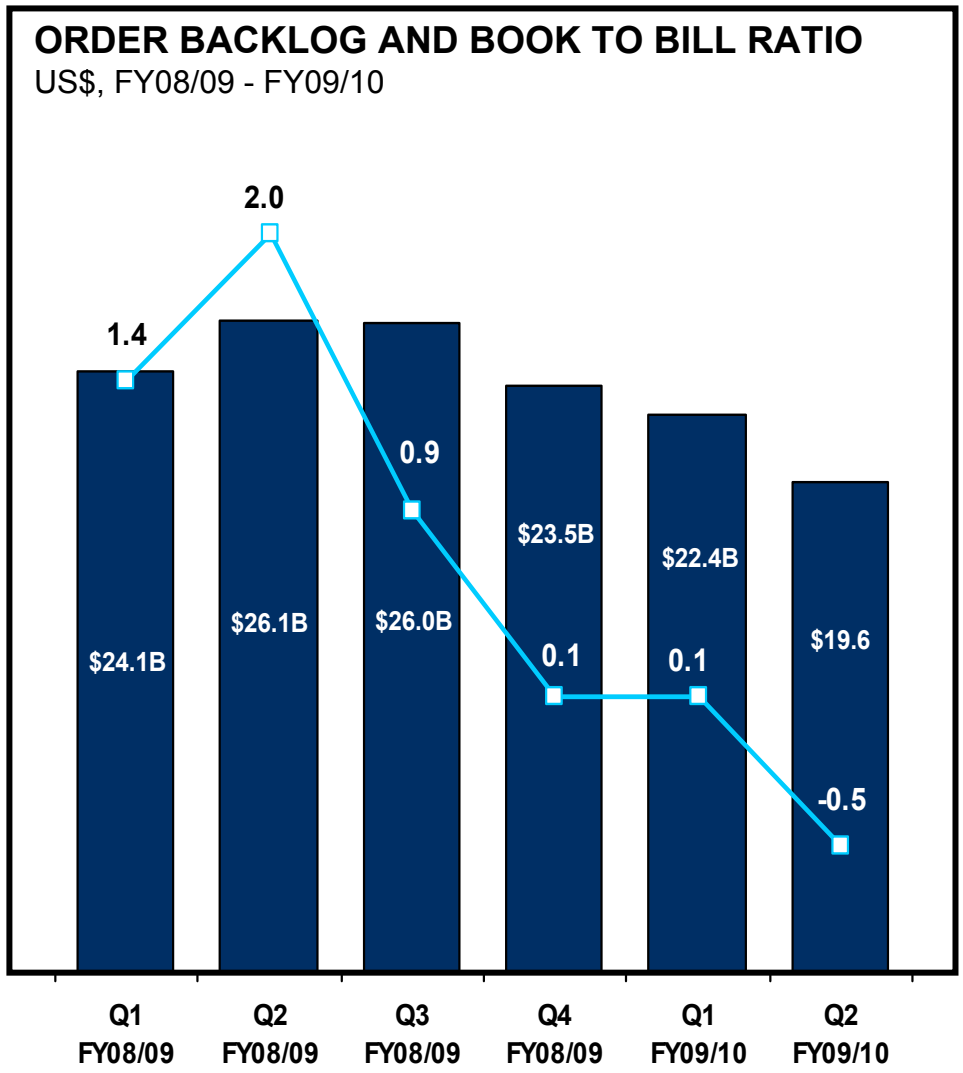
# Our backlog remains strong but our book-to-bill ratio has been impacted by higher than usual number of cancellations and deferrals

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# General economic outlook has improved in last 6 months however it has not been evident in number of orders received

| Aerospace Drivers | Trend | Justification |
|---|---|---|
| U.S. Economic Environment | ➲ | The US economy continues to suffer a prolonged downturn though signs of recovery have emerged |
| Global Economic Environment | ➲ | The global economy is being impacted by a reduction in world trade, though there are points of view that China will lead the recovery |
| Industry Backlog | ⇩ | Book-to-bill ratio's have dropped below one and industry net orders are negative in addition to high level of cancellations<br>Industry backlog is riskier due to higher exposure to multiple AC deal cancellations |
| Customer Health | ⇩ | Weaker corporate profits and massive losses expected again in the airline industry (IATA forecasts losses of $11B as of September 2009)<br>Business aviation deliveries from January 1 to June 30 this year dropped 36% - to 291 units from 453 for the same period in 2008 (GAMA - All segments in which Bombardier competes) |
| Aircraft Financing | ⇩ | Financing continues to be an issue as banks and export credit agencies examine carefully the viability of airlines<br>Tightening financial conditions have eased but aircraft buyers are still suffering from lower leverage availability |
| Used Inventory | ➲ | Used inventory in the business jet market remains high but showing signs of stabilization however, falling prices continue to place pressure on new and existing deals |
| Supply chain risk | ➲ | No major supplier interruptions to date, weaker industry demand and program cancellations could increase risk of bankruptcy |
| Corporate travel | ➲ | Negative media publicity of business jet travel continues, albeit to a lesser extent; restricted corporate travel budgets impacting airline financial health |
| Bombardier Aerospace Fleet utilization[1] | ➲ | Year-over-year reduction in fleet utilization in business and commercial aircraft is -15% (August) and -5% (July) respectively |

⇧ Indicates a favourable trend in the market categories in which BA competes.
⇩ Indicates a unfavourable trend in the market categories in which BA competes.
➲ Indicates a neutral trend in the market categories in which BA competes.

[1] Source: FRACAS database

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# Our focus: executing our Enterprise Strategy

## BOMBARDIER AEROSPACE ENTERPRISE STRATEGY

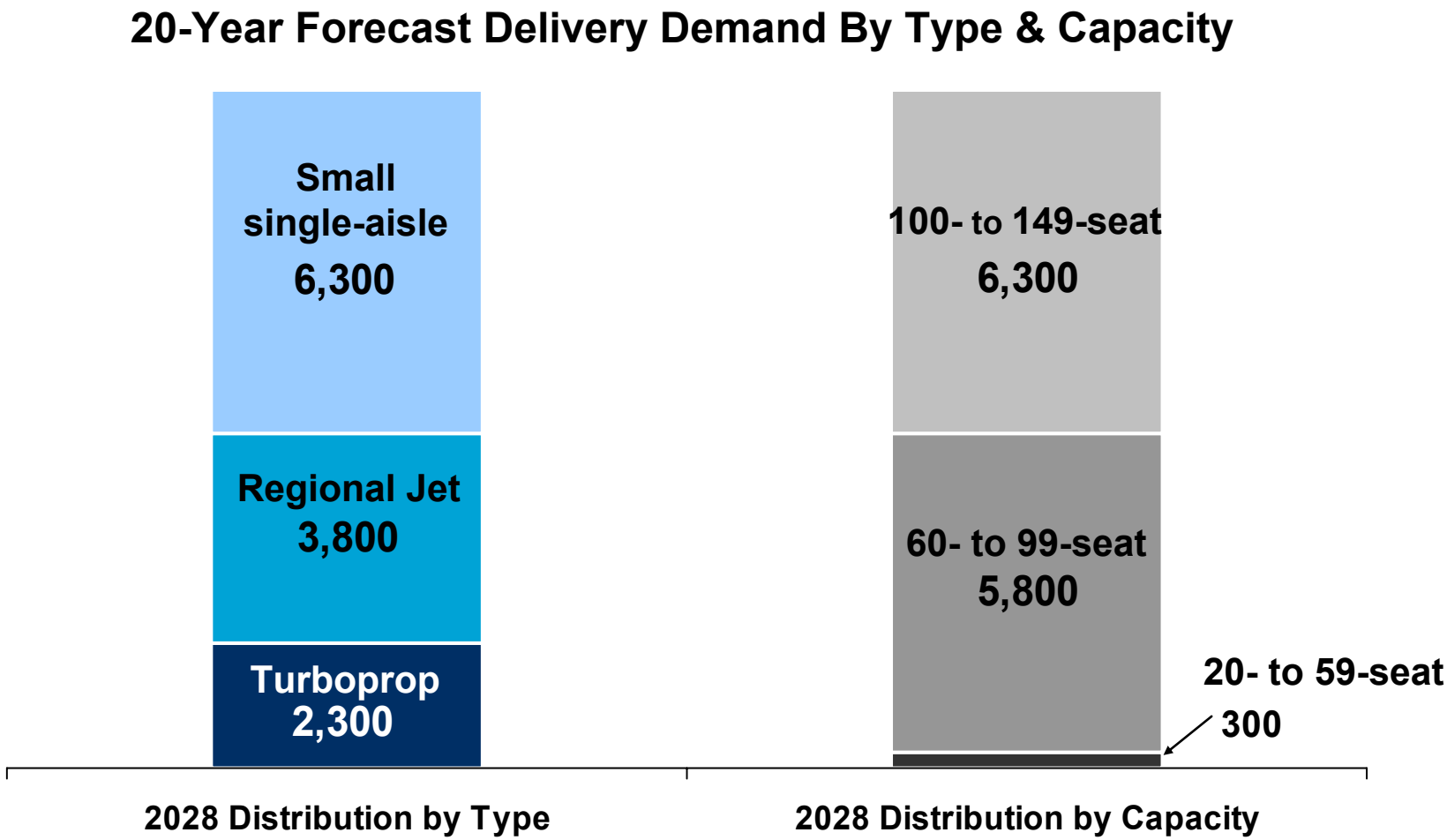
**Objective & Scope**

Strengthen long-term **leadership** in our industry segments through revenue growth and sustainable **best-in-class financial** performance with the **most loyal customer** base by 2020. We will achieve this by leveraging our **comprehensive portfolio** of high performance business jets, efficient commercial jets and turboprops, quality aircraft services and :

**Levers of our Strategy**

| WAY FORWARD | | | | | OPERATIONS | |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Become #1 in customer satisfaction through enhanced execution | Raise our game on global talent manage-ment | Actively manage risks | Establish local roots in all key markets | Enhance our corporate social respons-ibility | Develop innovative, environ-mentally conscious products that meet customer needs globally | Evolve into a lean enterprise with strong global supply chain partner-ships |

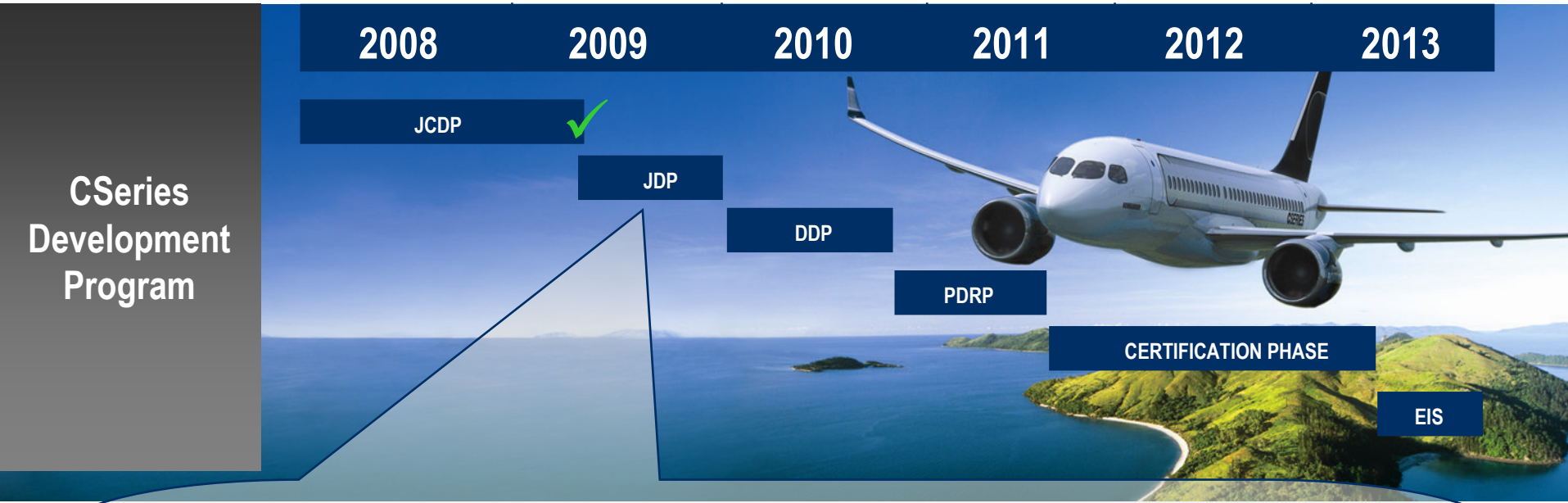
# The Bombardier 20-Year forecast outlines significant market opportunities for commercial aircraft




Source: Bombardier Market Development

# Our focus: C*SERIES* program is moving into next phase of development

**6** Develop innovative, environmentally conscious products that meet customer needs globally




## JDP Focus

- Ground breaking for *Complete Integrated Aircraft Test* facility
- Complete Advanced Aluminum Fuselage Barrel Demonstrator
- Complete CFRP Wing Demonstrator
- High Speed and Ground Effect Wind Tunnel Tests on schedule with 35% complete
- Preliminary Design Review Close-Out on schedule with 25% complete

JCDP: Joint Conception Definition Phase
JDP: Joint Definition Phase
DDP: Detail Design Phase

PDRP: Product Definition Release Phase
EIS: Entry Into Service
CFRP: Carbon Fiber Reinforced Polymer

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# CSERIES • Partners and suppliers

**6** Develop innovative, environmentally conscious products that meet customer needs globally

**Pratt & Whitney** (A United Technologies Company)
*PurePower ™ PW1500G Engines*

**Rockwell Collins**
*Avionics*

**ZODIAC AEROSPACE**
*Interiors*

**中航工业沈阳飞机工业（集团）有限公司 AVIC SHENYANG AIRCRAFT CORPORATION**
*Fuselage (Fwd / Mid / Aft)*
*Tailcone*
*Doors*

**BOMBARDIER**
**ST-Laurent Site**
*Cockpit*
*Rear Fuselage*

**BOMBARDIER**
**Belfast Site**
*Wing*

*Vertical Stabilizer*
*Horizontal Stabilizer*

**GOODRICH**
*Flaps & Slats Actuation*
*Ice Detection*
*Air Data System*
*Lighting System*

**LIEBHERR**
*Air Management System*
*Complete Landing Gears*

**Parker**
*Fuel & Inerting System*
*Hydraulics*
*Fly-By-Wire*

**Honeywell**
*Auxiliary Power Unit*
*Inertial Reference System*

**Esterline** (Korry Electronics)
*Cockpit Control Panels*

**Kidde Aerospace & Defense** (A Hamilton Sundstrand Company)
*Fire Protection System*

**WOODWARD**
*Throttle Quadrant Assembly*

**CAE**
*Simulation Tools (ESIM)*
*Training Devices (FFS)*

**Panasonic** Panasonic Avionics Corporation
*Cabin Management System*

**Hamilton Sundstrand** (A United Technologies Company)
*Electrical System*

**SPIRIT AEROSYSTEMS**
*Pylons*

**senior**
**BWT**
*ECS LP Ducting*
**SSP**
ECS HP Ducting

**MEGGITT**
*Wheels & Brakes*

**L3 communications** Aviation Recorders
*Flight Data Recorder*
*Cockpit Voice Recorder*

**Fokker Elmo**
*Wiring*

**98%**
**BOM Secured**

PurePower™ PW1500G engine is a Trademark of United Technologies Corp. – Pratt & Whitney or its subsidiaries.

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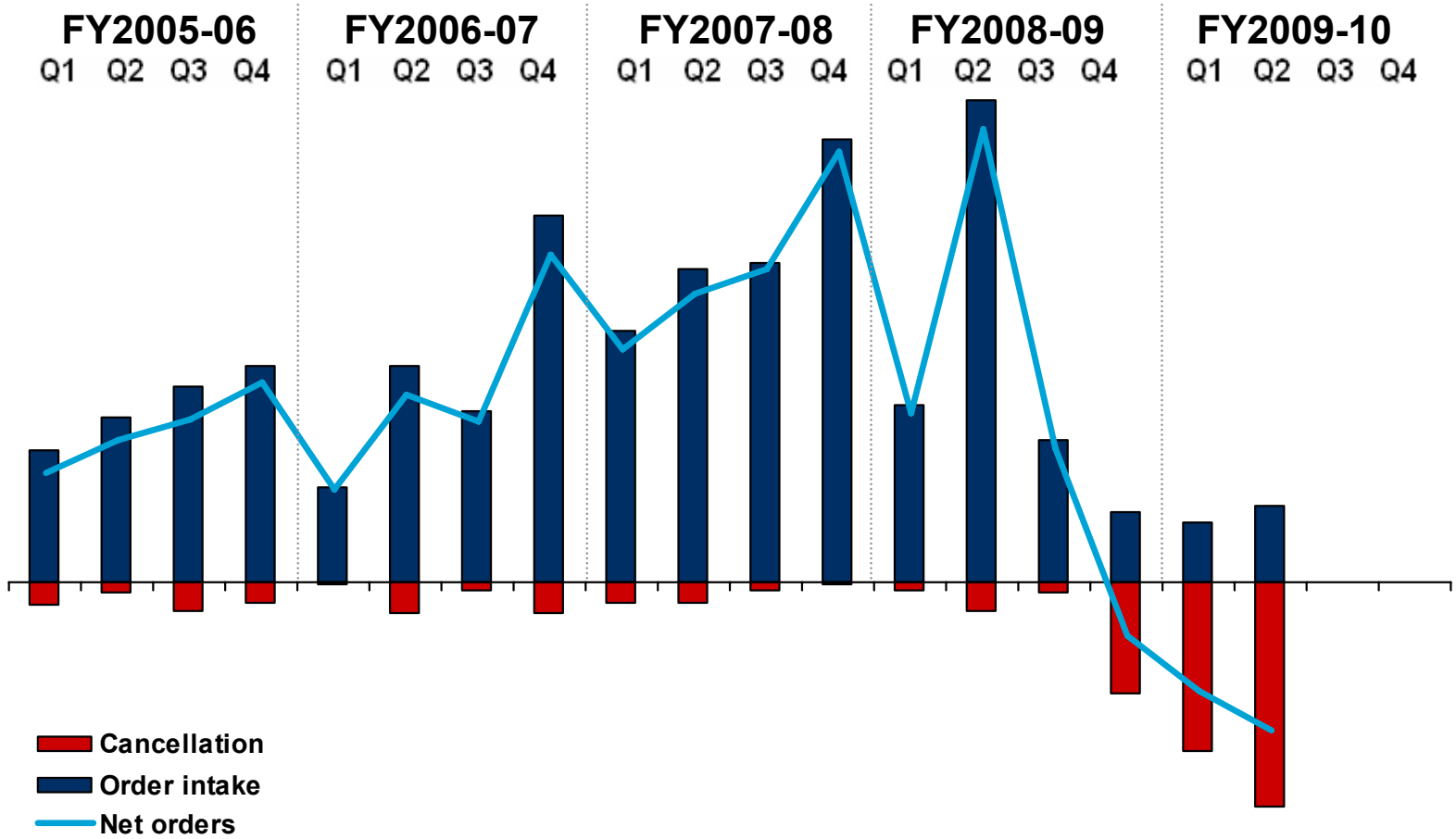
# The last three quarters have seen significant cancellations and negative order intake

**GROSS / NET ORDER ANALYSIS**
Units, Q1FY06-Q2FY10




Source : MD&A & internal data

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# Business Aircraft fundamentals will remain strong in the long term

| 10-Year Outlook | | |
|---|---|---|
| **Market Driver** | **Description** | **Outlook** |
| **Globalization of Trade** | As trade barriers fall and global mobility increases, the business community requires flexible travel means like business aviation to efficiently link all workplaces. | |
| **Emerging Markets** | Growth potential from emerging countries becomes significant as international commerce develops. Once the infrastructure is in place, countries such as India and China should lead new order growth. | |
| **Replacement Demand** | The worldwide installed base is comprised of over 13,000 aircraft(1). With more than 60% of customers trading-up to a larger aircraft, and average aircraft replacement every 6.6 years for new purchases, business aircraft market should continue to show vitality. | |
| **Accessibility** | Non-traditional solutions (e.g. branded charter, card programs, fractional ownership) offer tailor-made services to customers. These customized solutions provide greater access to business aviation. | |

(1) Excludes Very Light Jets, ACJ and BBJ

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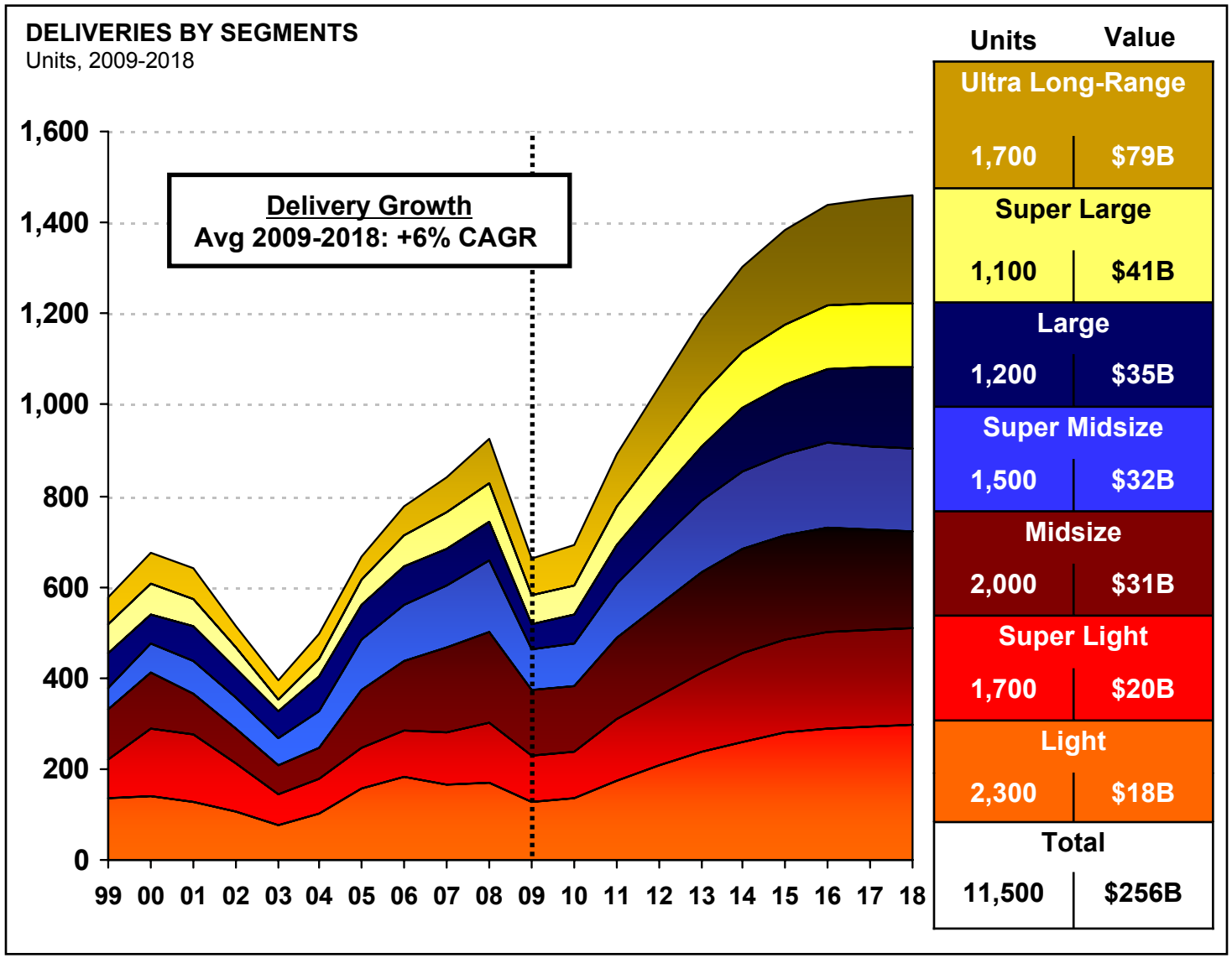
# Industry deliveries will bounce back




Source: GAMA, BBAD Market Forecast

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# Bombardier has the industry's strongest product portfolio

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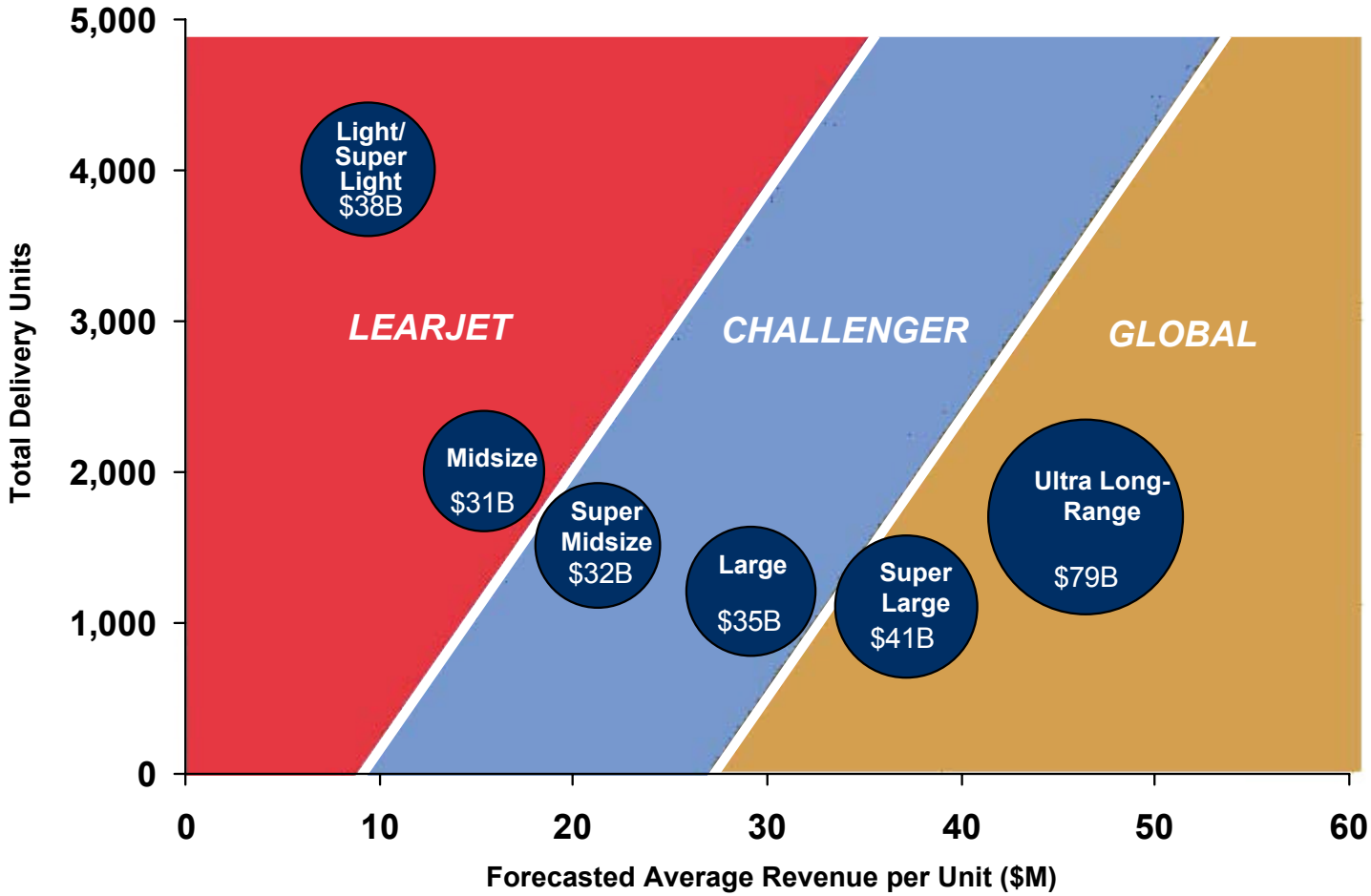
# Bombardier is well positioned to capture future growth in all the significant segments of Business Aviation

**BUSINESS JET FORECAST BY SEGMENT**
Delivery units, avg. revenue per unit, total market revenue (US$B)




Sources: Bombardier analysis. Revenues estimated from GAMA and B&CA list prices. Constant 2008 US$, calendar years 2009-2018

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# Bombardier Business Aircraft's Way Forward

| | Levers of our strategy | Strategic actions |
|---|---|---|
| WAY FORWARD | 1 Become #1 in customer satisfaction through enhanced execution | Ultimately, customer satisfaction will differentiate Bombardier from competitors |
| | 2 Raise our game on global talent management | Motivated, engaged employees significantly impact business performance |
| | 3 Actively manage risks | Matching demand & capacity ensures minimum inventory and maximum sales potential |
| | 4 Establish local roots in all key markets | Focusing on new segments and geographies will positively impact sales performance |
| | 5 Enhance our corporate social responsibility | Leading business aviation environmental strategy to ensure sustainable long-term business |
| OPERATIONS | 6 Develop innovative, environmentally conscious products that meet customer needs globally | Robust product portfolio plan to ensure solid financial performance & market share growth |
| | 7 Evolve into a lean enterprise with strong global supply chain partnerships | Develop competitive advantage, in costs and working capital management |

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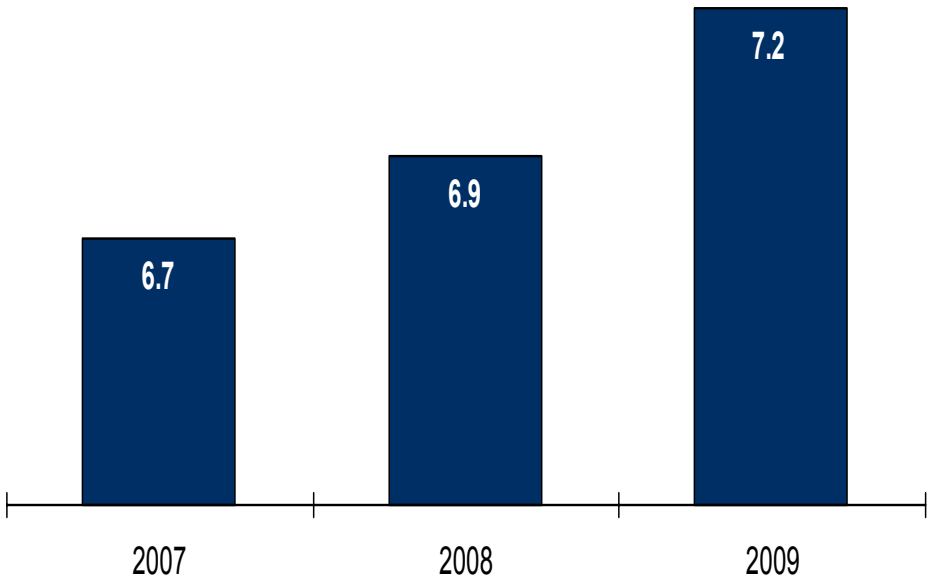
# Customer satisfaction has improved significantly

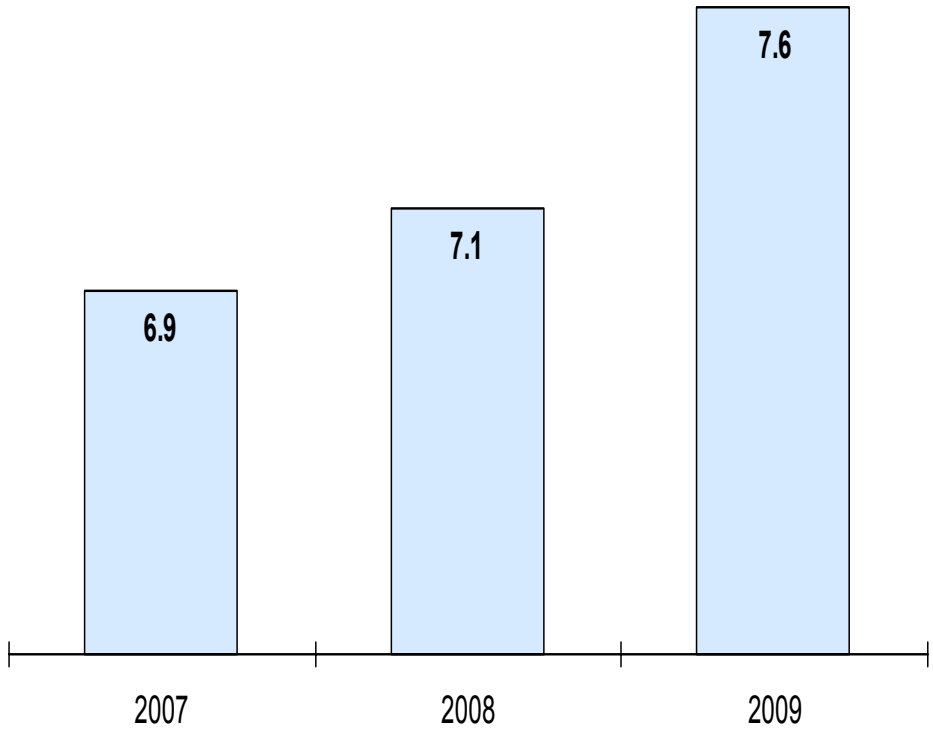
## AIN (Aviation International News)

**Bombardier Business Aircraft Average Survey Score**
BBA internal analysis based on AIN data for Learjet, Challenger and Global Aircraft families <10 years old




## Professional Pilot

**Overall Bombardier Survey Score**




**We are making good progress on customer satisfaction**

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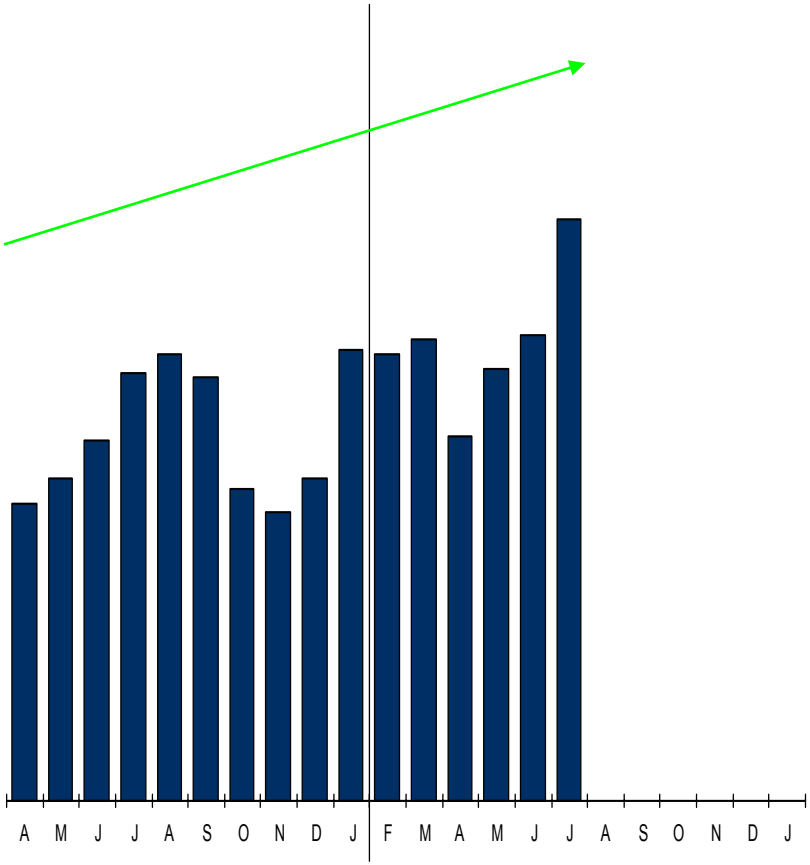
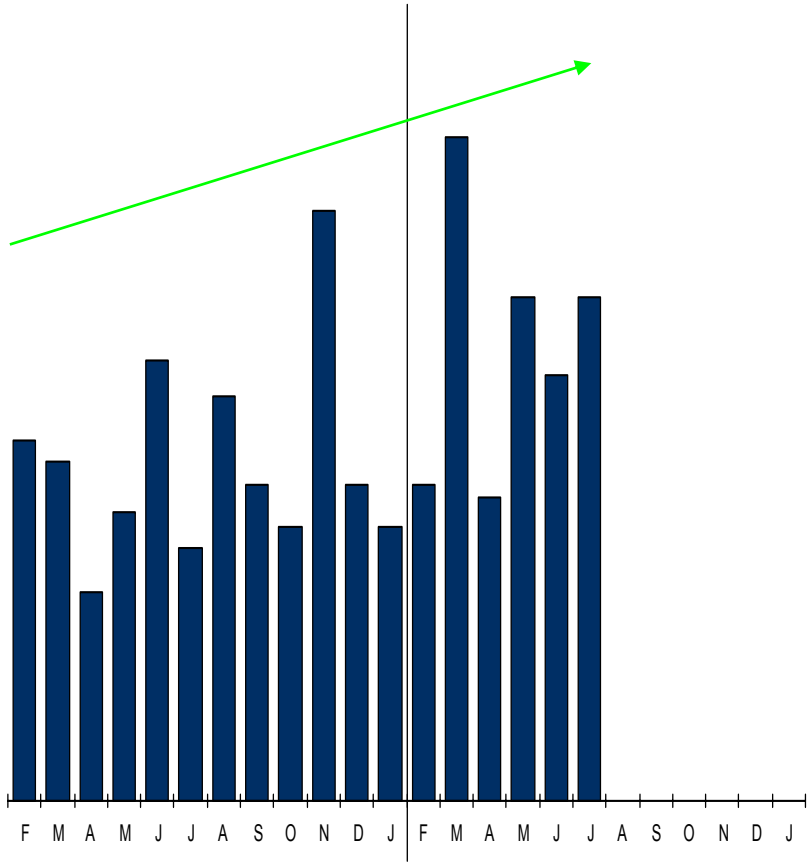
# Enhanced execution is critical to customer satisfaction

**BBA CUSTOMER SATISFACTION**
Delivery Survey, FY09-Current




FY 2008/09 FY 2009/10

**BBA ON-TIME DELIVERY PERFORMANCE**
FY09-Current, %




FY 2008/09 FY 2009/10

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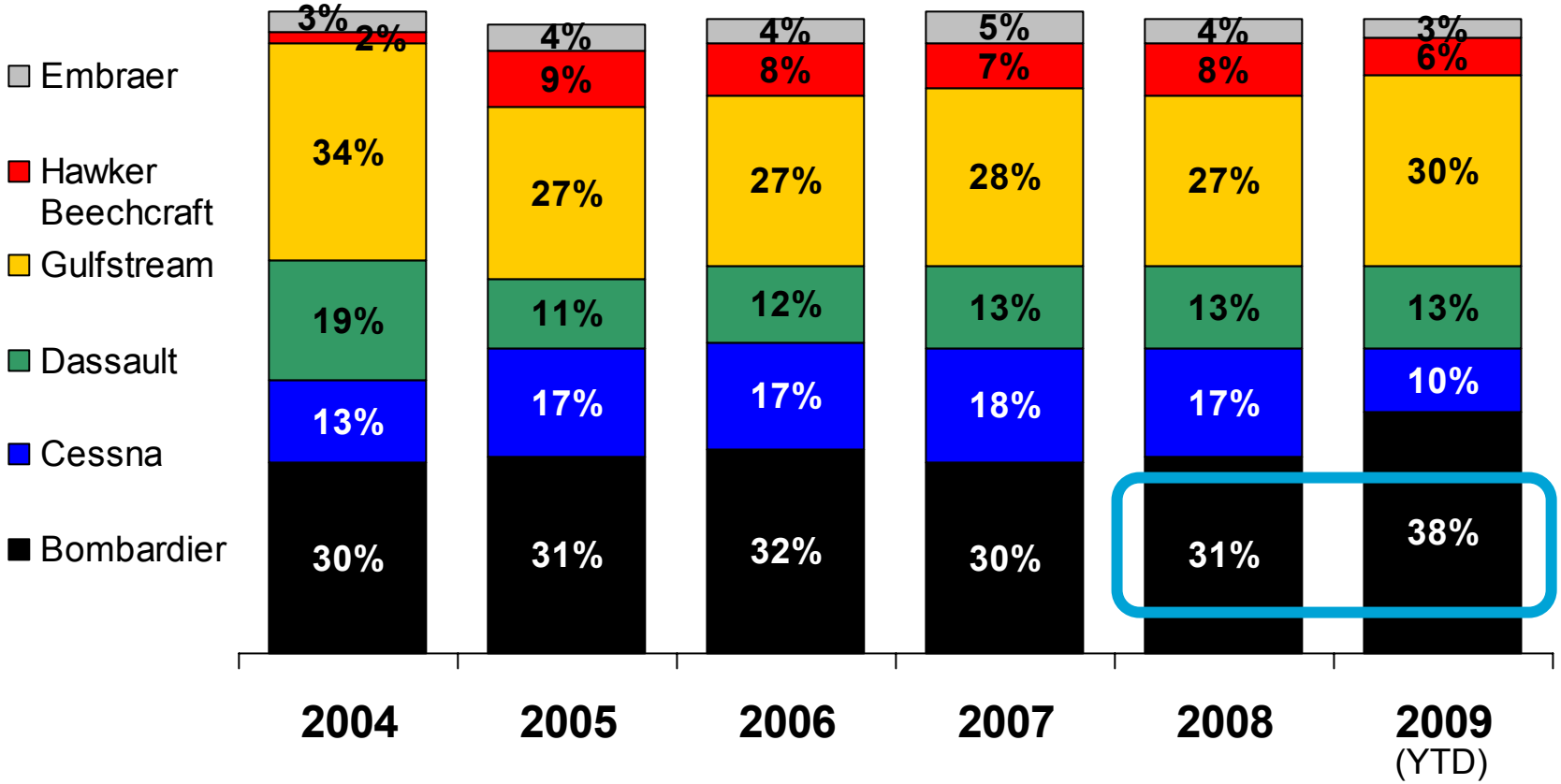
# Bombardier has increased its market share

**ESTIMATED REVENUE MARKET SHARE**

Segments in which Bombardier competes, %, Calendar year

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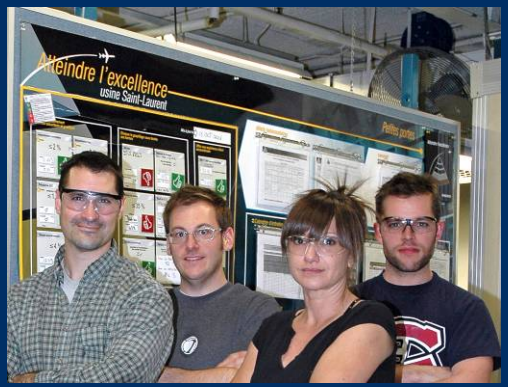
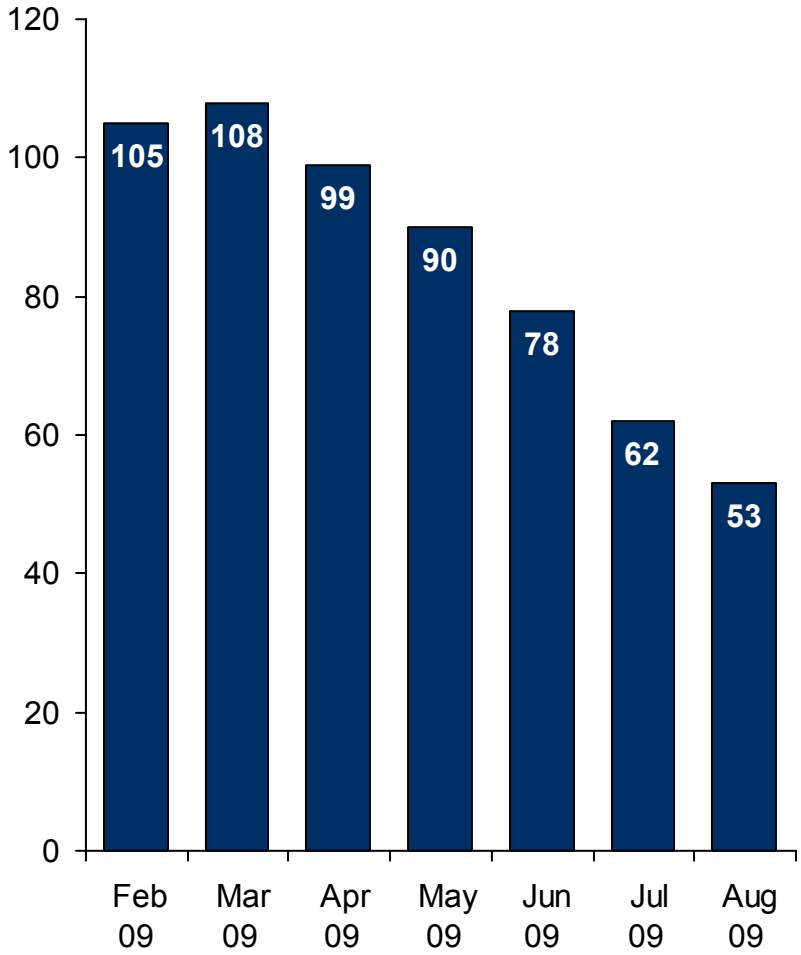
# Engaged employees significantly impact business performance

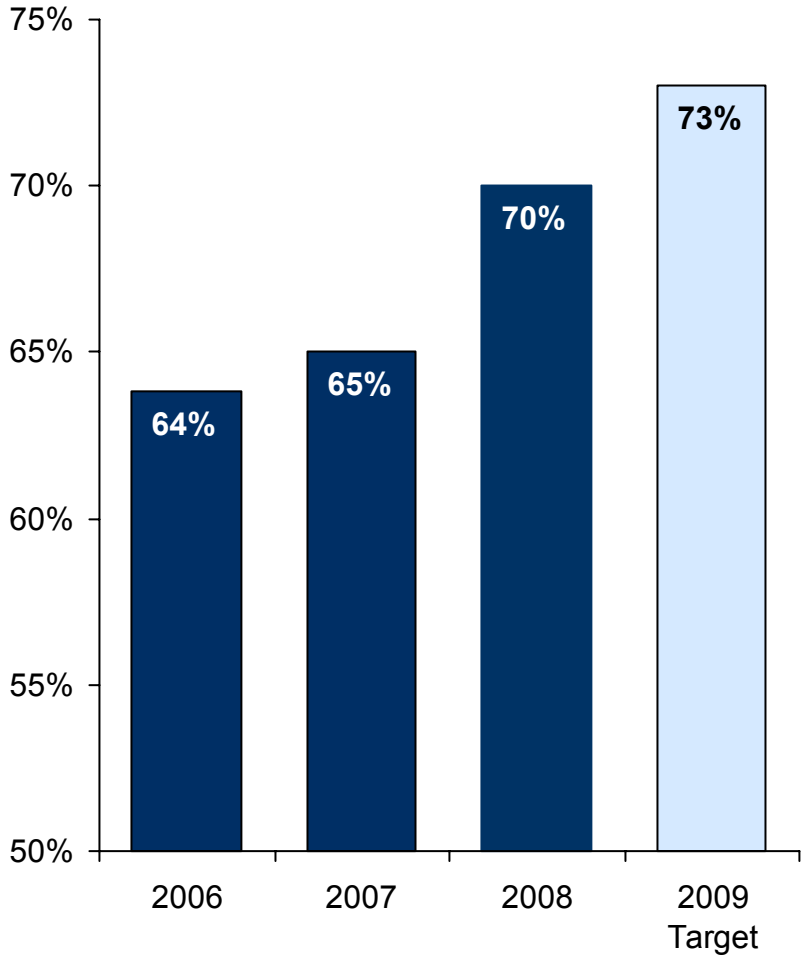


# Business Aircraft has continued emphasis on Health and Safety and drive for world-class performance

**BBA Environmental Health and Safety**
Number of work days lost per 200 khrs




**BBA Employee Engagement**
Engagement score based on internal survey

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BOMBARDIER

# Bombardier is well positioned to capture future growth in all the significant segments of Business Aviation

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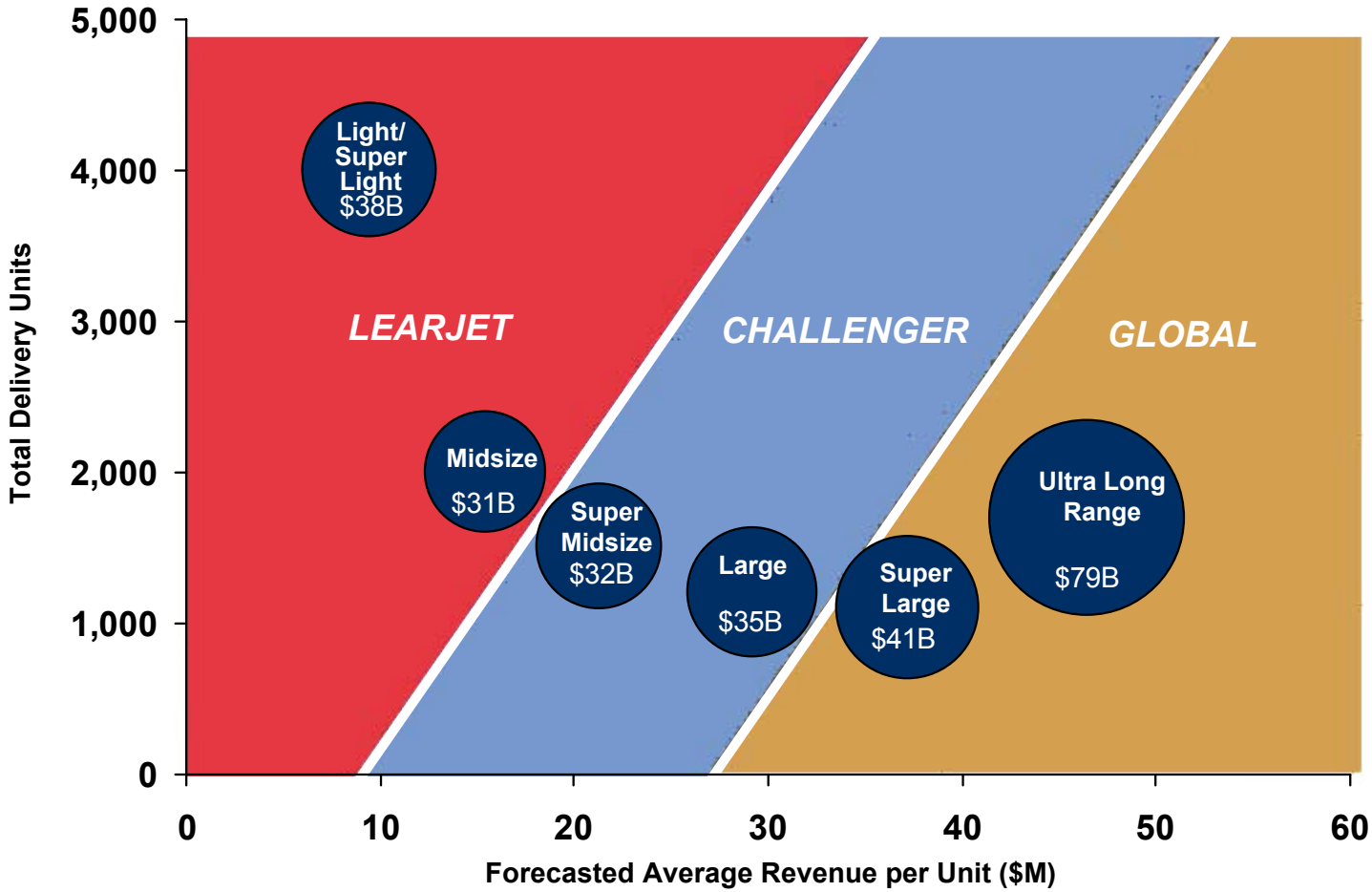


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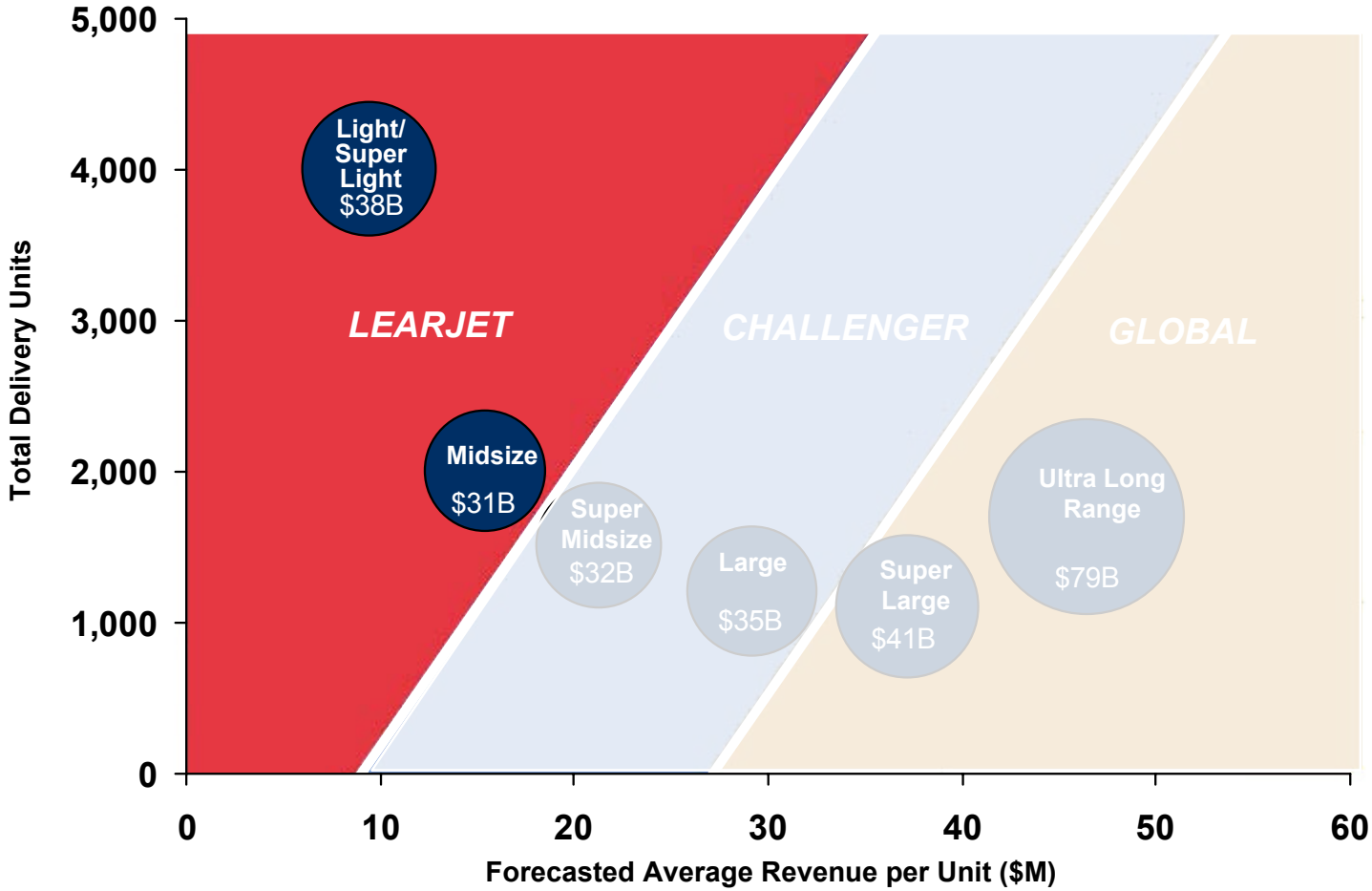


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BOMBARDIER

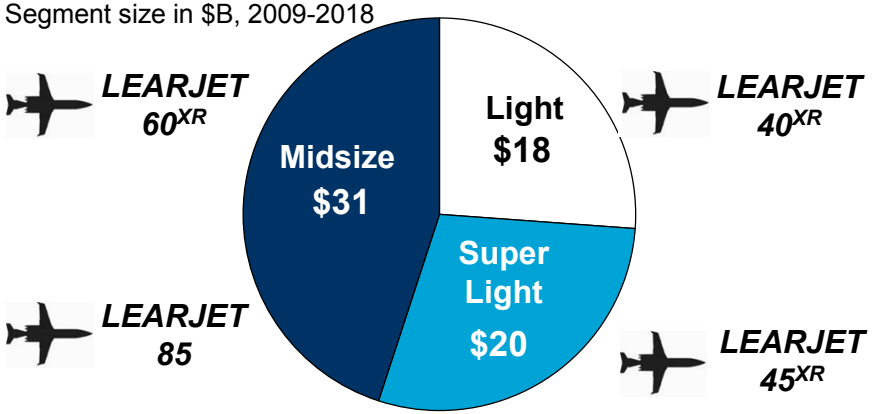
LEARJET 40XR

LEARJET 45XR

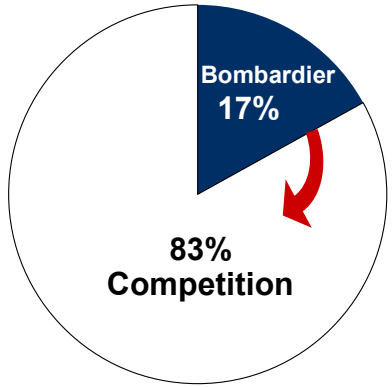
LEARJET 60XR

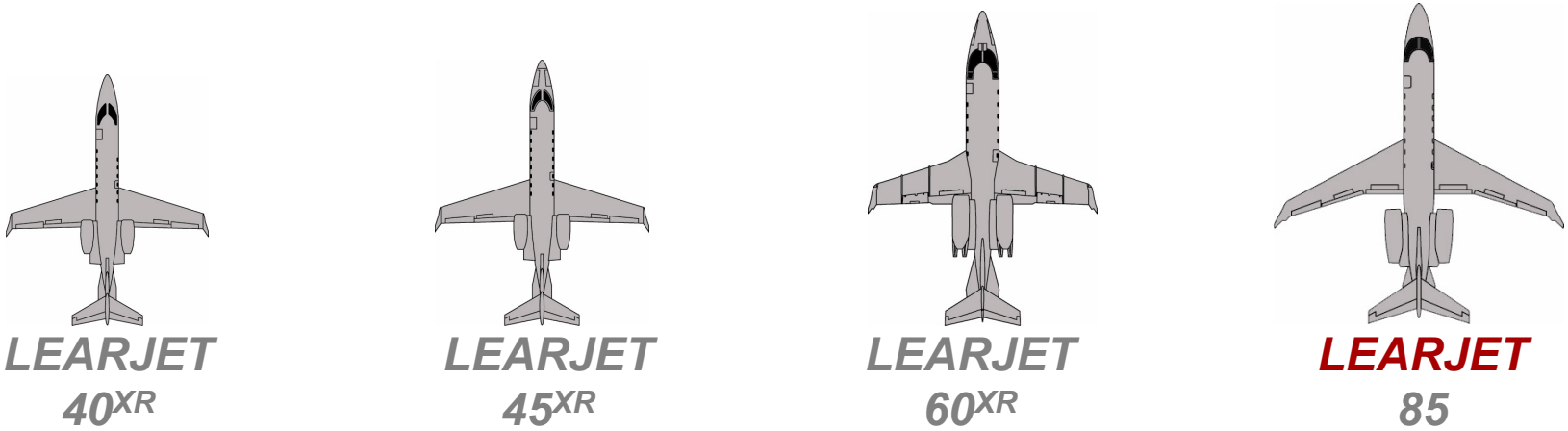
# The revolutionary *Learjet 85* will increase our presence in the midsize segment

**FORECASTED SEGMENT SIZE**
Segment size in $B, 2009-2018




**CURRENT MARKET SHARE**
% of deliveries in units, 2004-08

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BOMBARDIER
LEARJET 85

# PROGRESS IS EVERYTHING

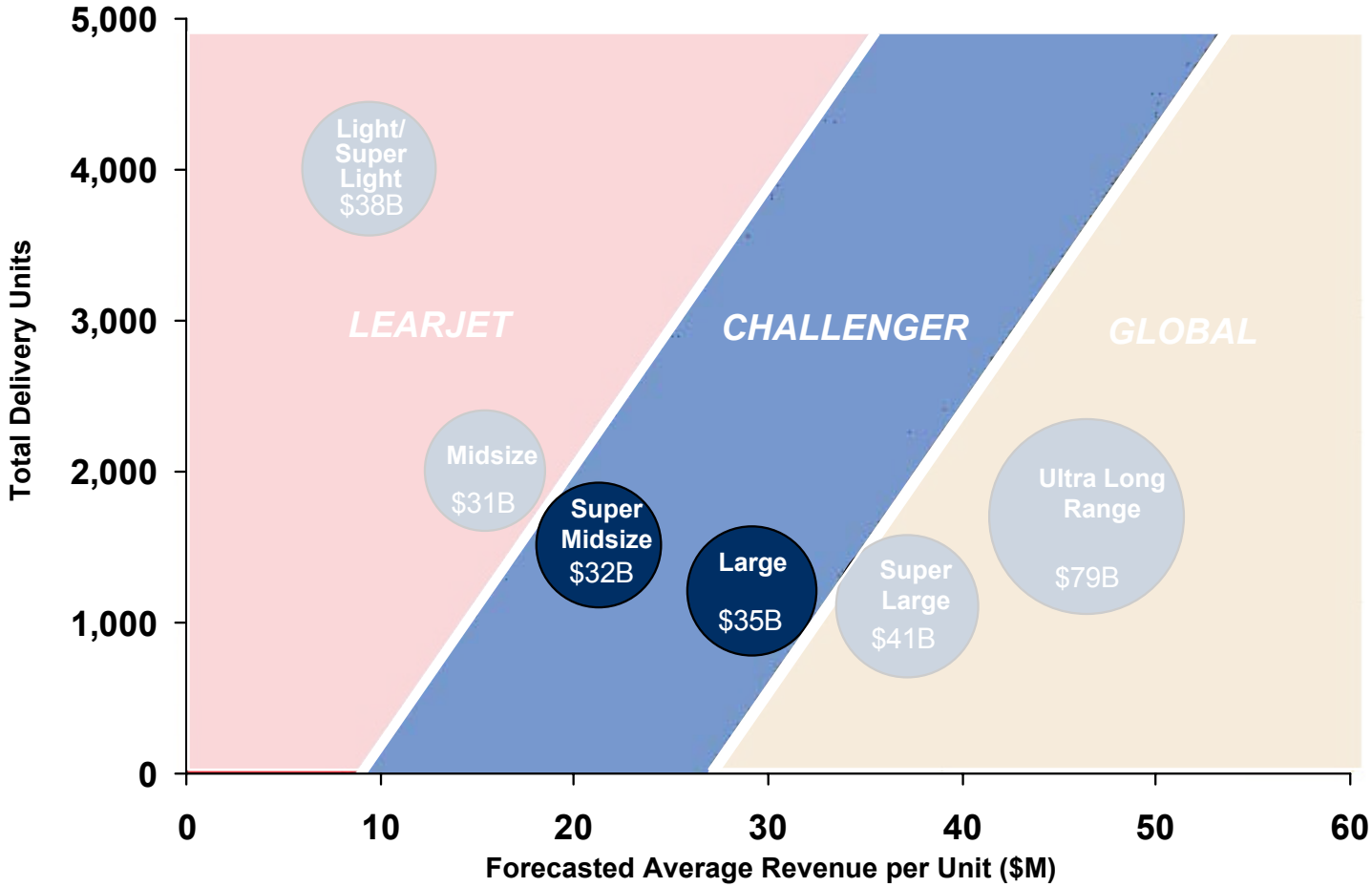
**On schedule for entry into service in 2013**

# Learjet 85 is a Game-Changer in the Midsize Market

Most comfortable cabin in the midsize category

# Bombardier is well positioned to capture future growth in all the significant segments of Business Aviation

**BUSINESS JET FORECAST BY SEGMENT**
Delivery units, avg. revenue per unit, total market revenue (US$B)




Sources: Bombardier analysis. Revenues estimated from GAMA and B&CA list prices. Constant 2008 US$, calendar years 2009-2018

BOMBARDIER

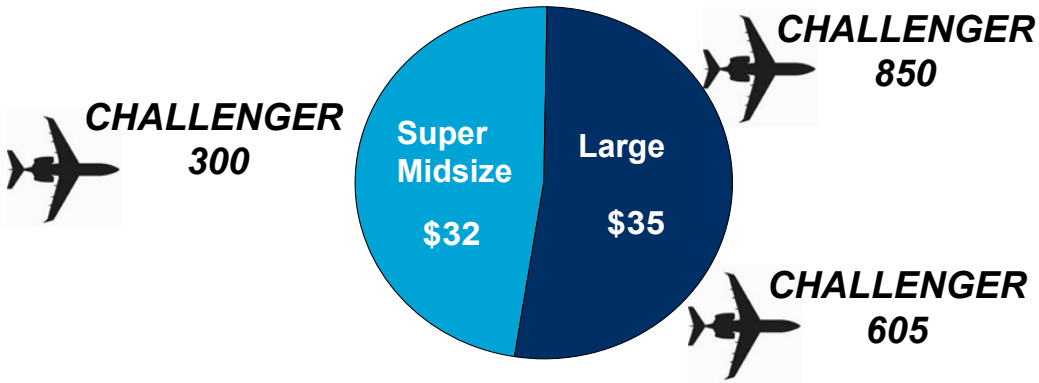
CHALLENGER 300

CHALLENGER 605

CHALLENGER 850

# *Challenger* market strategy will aim to protect our significant market shares into the Super Midsize and Large segments

**FORECASTED SEGMENT SIZE**
Segment size in $B, 2009-2018

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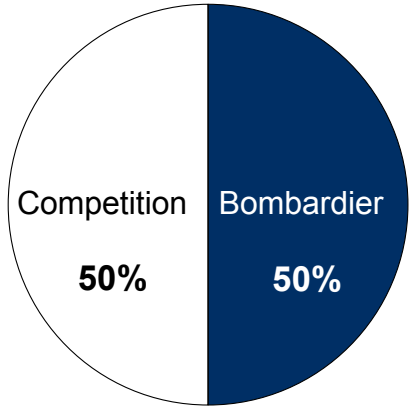
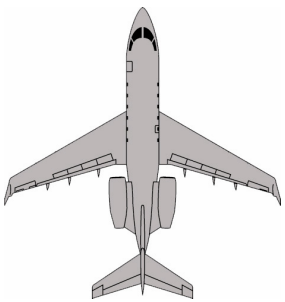
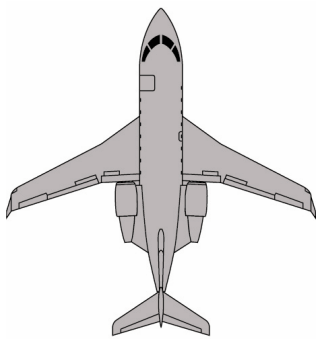
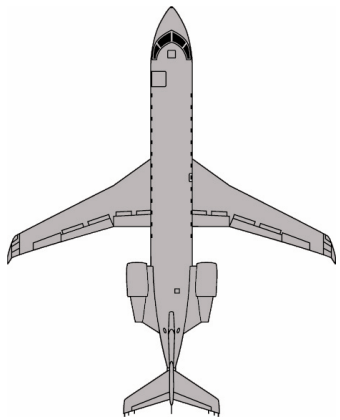


***CHALLENGER***
***300***



***CHALLENGER***
***605***



***CHALLENGER***
***850***

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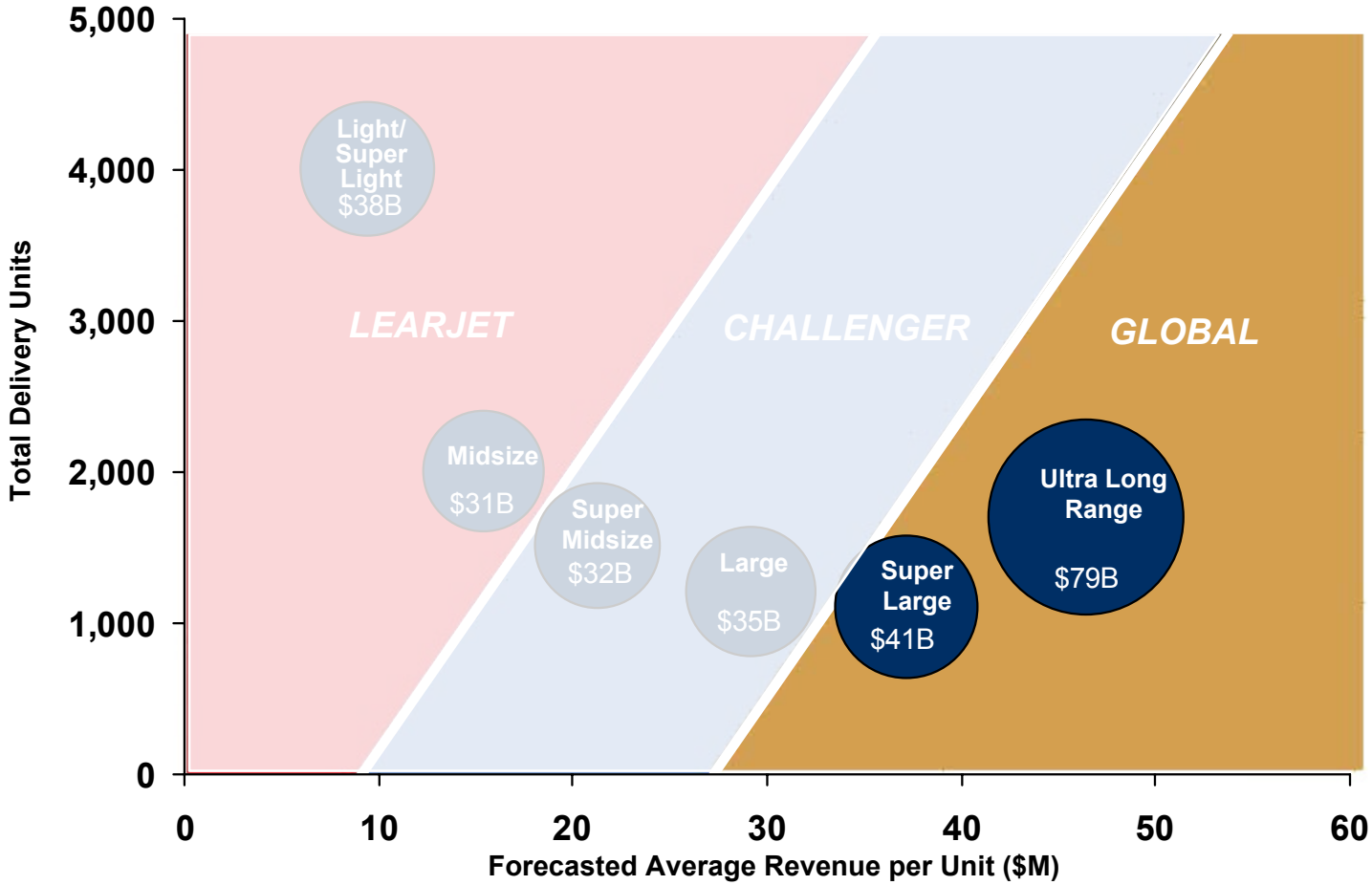
850
DEFINE YOUR SPACE
850now.com
BOMBARDIER
CHALLENGER 850

Comfort and performance
that is designed around you.

# Bombardier is well positioned to capture future growth in all the significant segments of Business Aviation

**BUSINESS JET FORECAST BY SEGMENT**
Delivery units, avg. revenue per unit, total market revenue (US$B)




Sources: Bombardier analysis. Revenues estimated from GAMA and B&CA list prices. Constant 2008 US$, calendar years 2009-2018

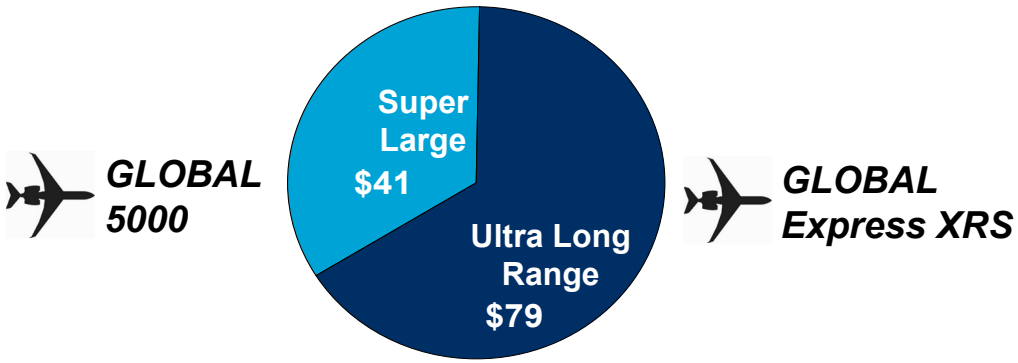
BOMBARDIER

GLOBAL 5000

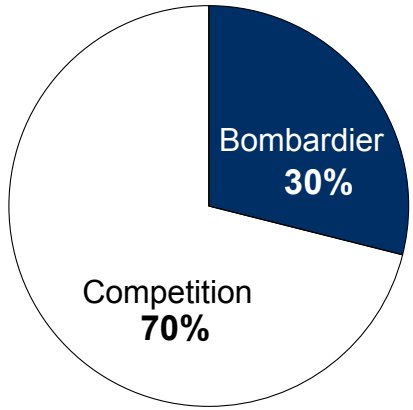
GLOBAL EXPRESS XRS

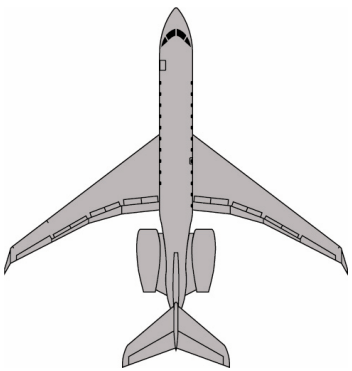
# Innovation in the *Global* family will strengthen our position in the Super Large and Ultra Long-Range segments

**FORECASTED SEGMENT SIZE**
Segment size in $B, 2009-2018

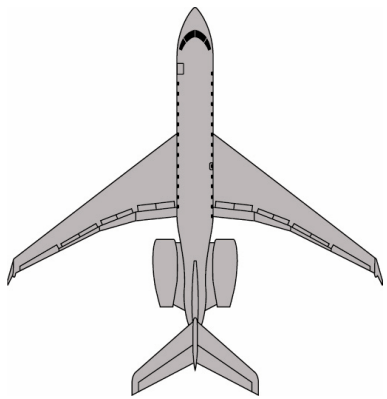



**CURRENT MARKET SHARE**
% of deliveries in units, 2008-09



GLOBAL 5000



GLOBAL EXPRESS XRS

BOMBARDIER

## Global Vision On-track for an entry into service in 2012

- ✓First flight on August 3rd 2009
- ✓Currently in active flight test program

State of the art cockpit designed with the customer in mind

# Bombardier Business Aircraft's Way Forward

| Levers of our strategy | Strategic actions |
|---|---|
| WAY FORWARD | |
| 1 Become #1 in customer satisfaction through enhanced execution | Ultimately, customer satisfaction will differentiate Bombardier from competitors |
| 2 Raise our game on global talent management | Motivated, engaged employees significantly impact business performance |
| 3 Actively manage risks | Matching demand & capacity ensures minimum inventory and maximum sales potential |
| 4 Establish local roots in all key markets | Focusing on new segments and geographies will positively impact sales performance |
| 5 Enhance our corporate social responsibility | Leading business aviation environmental strategy to ensure sustainable long-term business |
| IONS | |
| 6 Develop innovative, environmentally conscious products that meet customer needs globally | Robust product portfolio plan to ensure solid financial performance & market share growth |
| 7 Evolve into a lean enterprise with strong global supply chain partnerships | **Develop competitive advantage, in costs and working capital management** |

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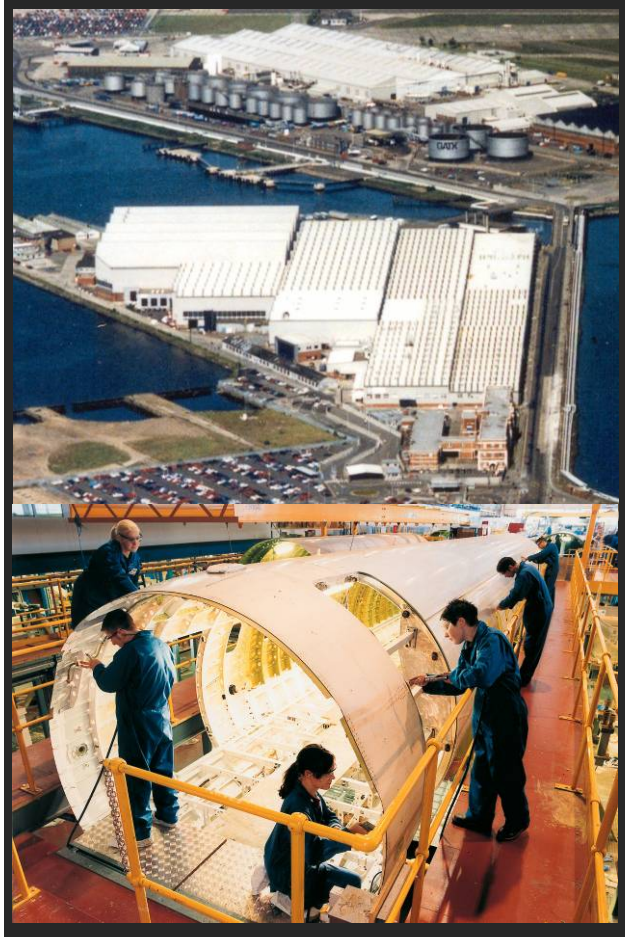
# Lean Enterprise Strategy – component and sub-assembly manufacturing facilities

## Querétaro - Mexico

## Belfast - UK



## Saint-Laurent - Canada

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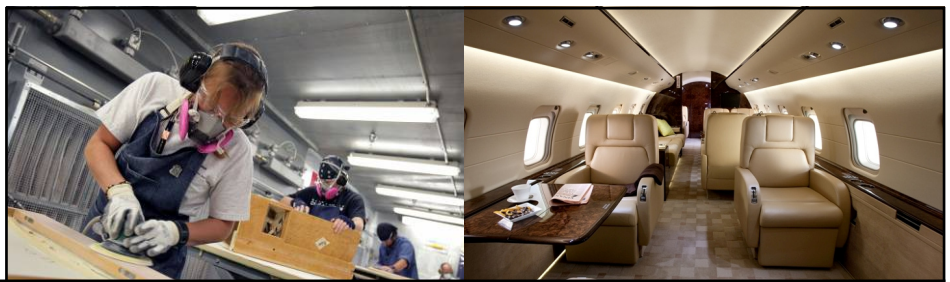
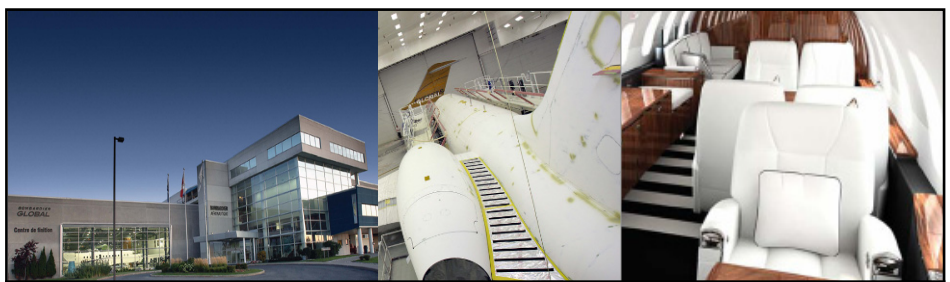
# Lean Enterprise Strategy – final assembly and completion facilities

| | Final assembly lines | In-house aircraft completion centers |
|---|---|---|
| LEARJET | | |
| | Wichita, U.S. | |
| CHALLENGER | |  |
| | Dorval, Canada | |
| GLOBAL | |  |
| | Toronto, Canada | Montréal, Canada |

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# Conclusion

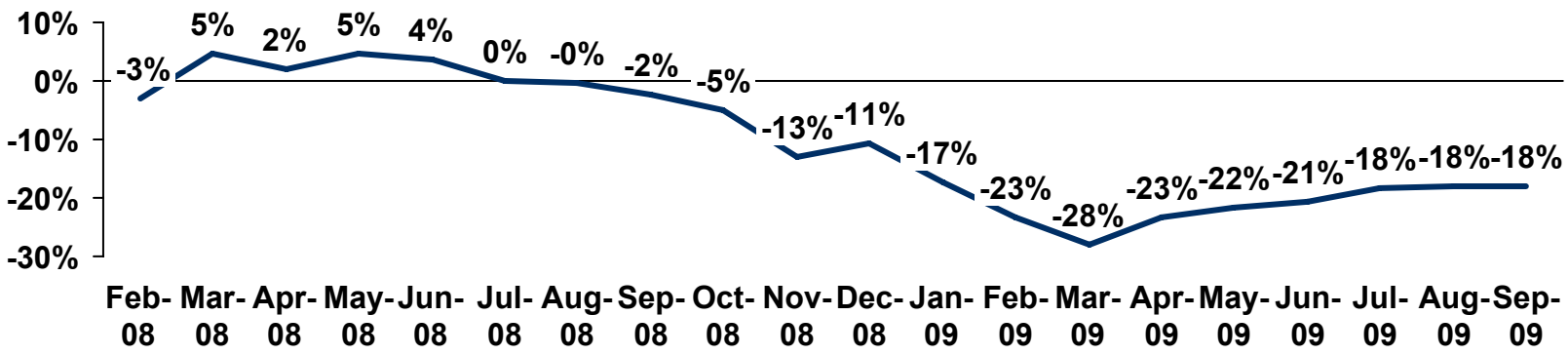
- **The short-term economic situation still shows signs of weakness**
- **Excellence in execution has placed us in a favourable position to be ready for market recovery**
- **The mid- to long-term outlook is positive with significant sales volumes forecasted for the next ten years**
- **Bombardier Business Aircraft's strategy is focused on growing our leadership position through customer satisfaction, excellent execution, and innovative product strategy**

# Executive summary

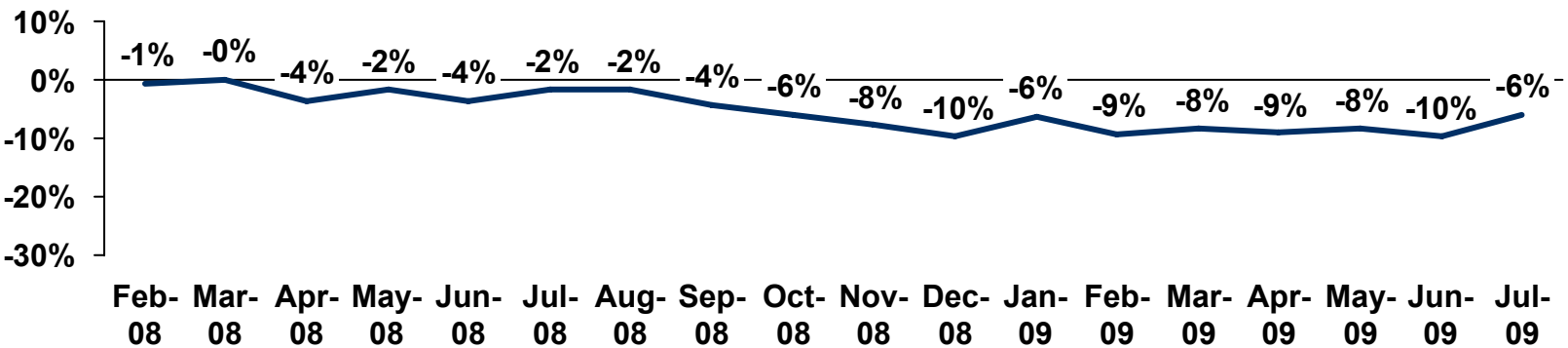
| | |
|---|---|
| **Bombardier Aerospace** *(Guy C. Hachey)* | ▪ Global economic recession is impacting orders and book-to-bill ratio<br>▪ Backlog provides protection to short term cancellations and deferrals<br>▪ Bombardier Aerospace Enterprise Strategy is guiding our actions<br>▪ Continuing to invest in the future |
| **Bombardier Business Aircraft** *(Steve Ridolfi)* | ▪ Long-term fundamentals remain solid and expansion into new segments and geographies suggest a positive long-term outlook<br>▪ Focus is on building on leadership position with new and innovative products |
| **Bombardier Customer Services** *(James Hoblyn)* | ▪ Keep strengthening services & support<br>▪ Build international service & support capabilities<br>▪ Develop innovative fleet management solutions |

# Fleet utilization is stabilizing

## Business Aircraft Fleet Utilization*




## Commercial Aircraft Fleet Utilization**




* Including non classic aircraft only for business aircraft.
** Including CRJ 100, 200 700 and Q400 only for commercial aircraft.
Source : FRACAS Database, adjusted for seasonality effects

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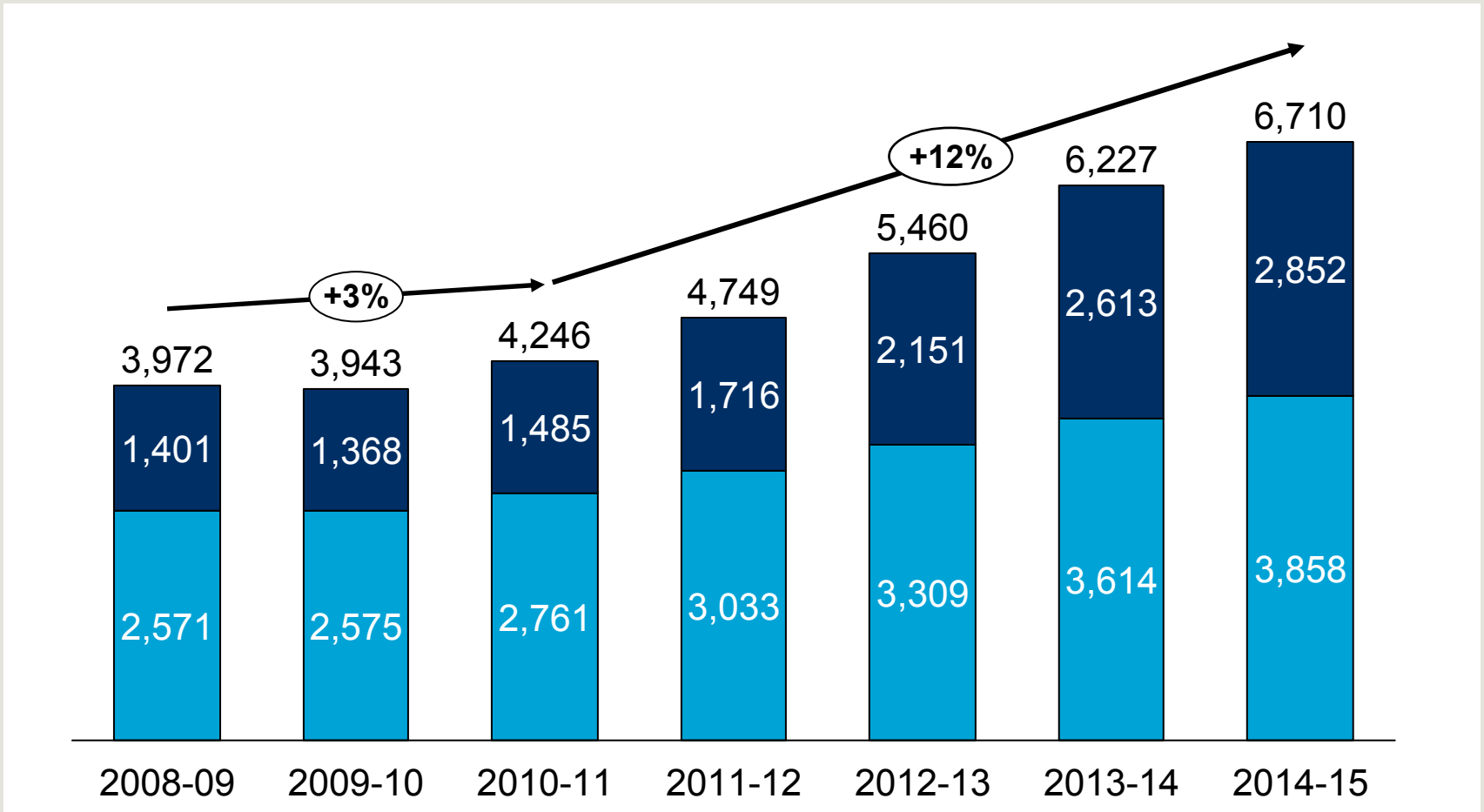
# MRO Market is expected to recover in 2011

**BA MRO 5-Year Market Forecast**
USD Millions (2009 Dollars), CAGR (%)




Source : Bombardier Analysis

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# Three areas of focus to deliver on our priorities

## Operators

Commercial Aircraft

Business Aircraft

Specialized Aircraft

## Priorities

World-Class customer engagement

Profitable growth of services

## Focus areas

1. Strengthen services & support
2. Build international service & support capabilities
3. Develop innovative fleet management solutions

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# We have made good progress on customer satisfaction drivers

***Aircraft Reliability & Quality***

- Closed 51 out of 98 top aircraft in service reliability issues
- Extended CRJ and Q-Series aircraft maintenance programs
- Implemented supplier performance process

***24hr Worldwide Support***

- Opened new commercial aircraft support offices in Tokyo, Sydney & Munich and expanded Shanghai office
- Added new Aircraft On the Ground (AOG) Mobile Repair Teams in Europe and the U.S.

***AOG Parts***

- Improved parts availability to 95% in Frankfurt & Sydney
- Launched new inventory management system
- Launched *PartsExpress* Europe for business aircraft customers

***Maintenance Support & Training***

- Added four new line maintenance facilities around the world
- Partnered with CAE as authorized training provider (ATP)
- Signed ATP agreement with Lufthansa Flight Training for CSeries

***Customer Care***

- Strengthened customer account manager teams
- Deployed new customer portal iflybombardier.com

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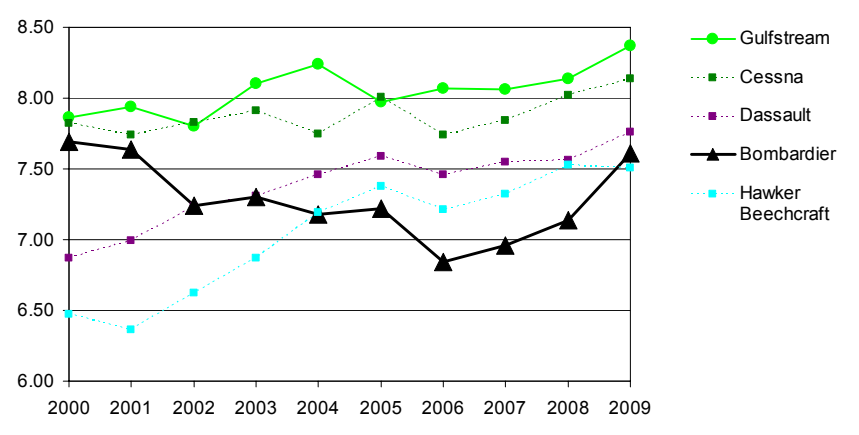
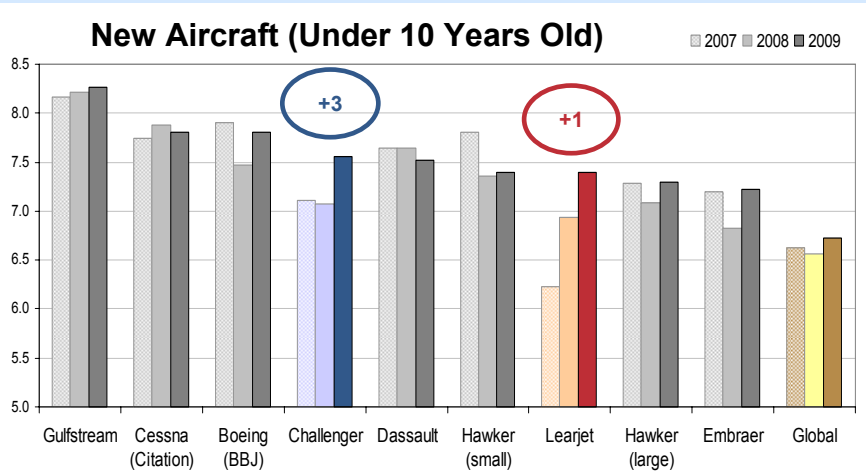
# Our business aircraft customers are saying we are improving

## Pro-Pilot Overall average scores 2000-2009




## Aviation International News (AIN) 2009




**Current focus:**

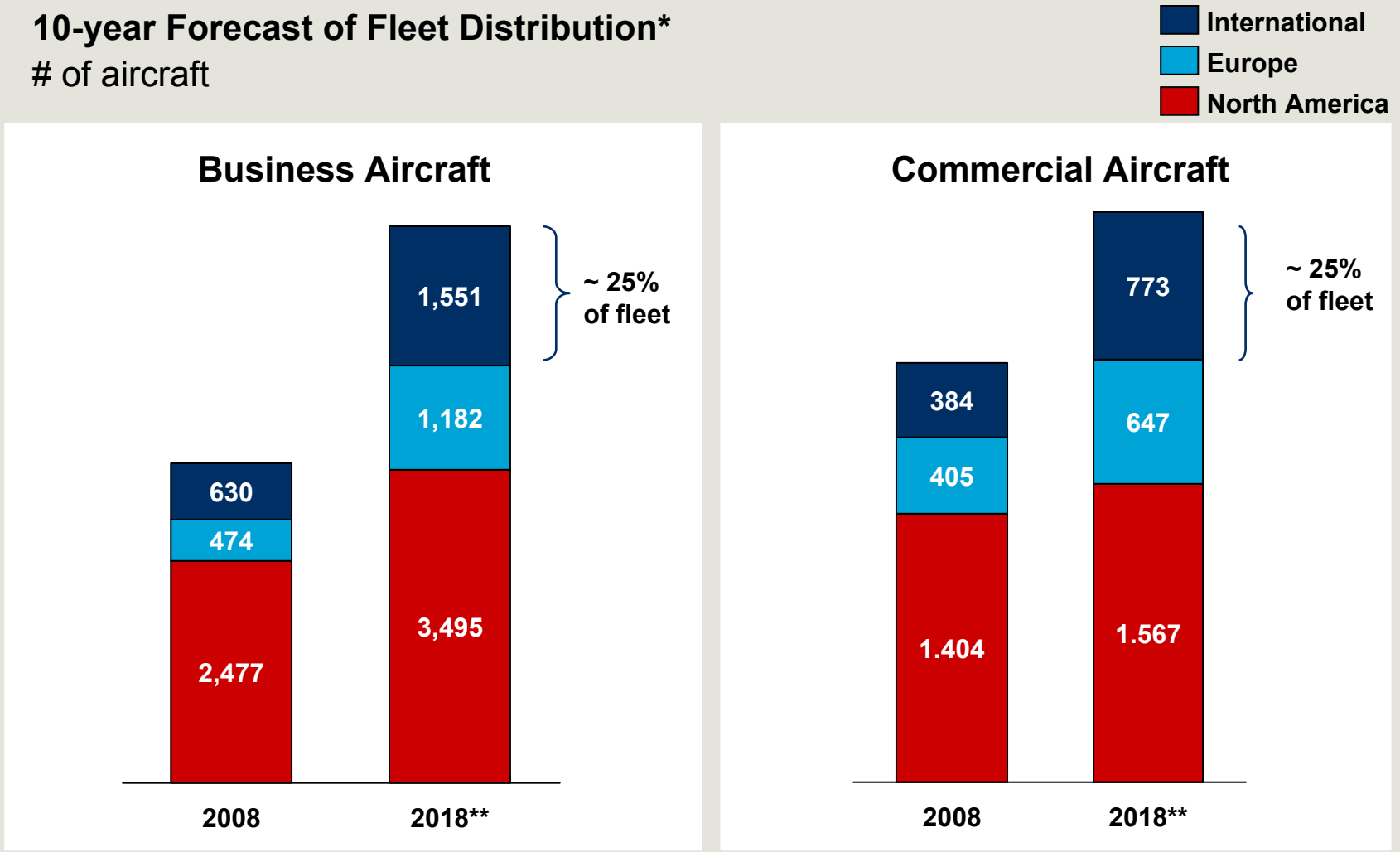
- Delivery experience
- Responsiveness / Problem resolution
- Reliability; Q400, Global
- Supplier management
- International parts availability

Note: Overall average scores 2007-2009 for new and older aircraft

# Our fleet is increasingly international

## 10-year Forecast of Fleet Distribution*

# of aircraft




* Based on current skyline and includes CRJ remarketing

** Applying Bombardier's fair market share to BBA and BCA forecasted worldwide deliveries

Source : Bombardier Analysis

# We are building an international network to serve customers globally and capture future growth

## Serving customers globally through:

- Four 24/7 customer response centers
- 7 regional support offices
- Four training facilities
- 53 business and commercial factory owned and authorized service facilities
- Two spare part distribution centers & six depots

# Innovative fleet management solutions will be an integral part of both existing and new platforms

## Smart Services

| Business Aircraft | | Commercial Aircraft | |
|---|---|---|---|
| Year Launched: | 1988 | Year Launched: | 2008 |
| Platforms: | All | Platforms: | Q400 |
| A/C Managed: | >1000 | Customers: | 4 |

***FUTURE PLATFORMS***

**Learjet 85**

**CSeries**

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# Glossary of Bombardier Aerospace Acronyms

| Acronym | Definition |
|---|---|
| ACJ | Airbus Corporate Jets |
| AIN | Aviation International News |
| AOG | Aircraft on Ground |
| ATP | Authorized Training Provider |
| BA | Bombardier Aerospace |
| BBA | Business Aircraft |
| BBD | Bombardier |
| BBJ | Boeing Business Jets |
| BCA | Bombardier Commercial Aircraft |
| B&CA | Business and Commercial Aviation |
| BOM | Bill of Material |
| CIASTA | Complete Integrated Aircraft Systems Test Area |
| CFRP | Carbon Fiber Reinforced Polymer |
| DDP | Detail Design Phase |
| EIS | Entry Into Service |
| FRACAS | Failure Reporting and Corrective Action System |
| GAMA | General Aviation Manufacturers Association |
| IATA | International Air Transport Association |
| JCDP | Joint Conception Definition Phase |
| JDP | Joint Definition Phase |
| MRO | Maintenance Repair & Overhaul |
| PDRP | Product Definition Release Phase |

# Trademark Information

*Bombardier, Bombardier Global 5000, Challenger, Challenger 300, Challenger 605, Challenger 850, CRJ200, CRJ700, CRJ900, CRJ1000, CSeries, Global, Global Vision, Learjet 40, Learjet 45, Learjet 60, Learjet 85, NextGen, Parts Express, Q200, Q300, Q400, XR and XRS* are trademarks of Bombardier Inc. or its subsidiaries.

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