

Corporate *Background & Structure*

Fleck Research

Global Connector Research Group (GCRG) is an industry research organization devoted exclusively to monitoring the performance, sales and trends of nearly 3,000 companies within the interconnect industry of connectors, cable assemblies and backplanes within North America, Europe, Japan and the Pacific Rim.

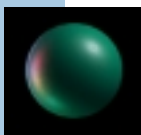
Global Connections

Since its inception by Ken Fleck, a veteran with over 30 years in the industry, GCRG and its subsidiaries—Fleck Research, Global Connections and Global Conventions—has evolved into much more than a research company.

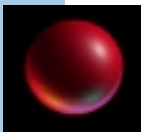
Global Conventions

With an attentive eye toward the rapidly-changing electronics industry, the company added many other types of services to assist its clients in addition to providing crucial industry research and market information. Through an innovative approach, it is recognized as the preeminent research consultancy, providing accurate, extensive and timely information and services.

GCRG is divided into three distinct operating divisions:



Fleck Research, its research division, focuses on providing detailed and accurate interconnect industry information on connectors, cable assemblies, backplanes, interconnect products and materials to suppliers, OEMs and distributors.



Global Connections, the mergers and acquisitions (M&A) division, focuses on providing discrete and professional industry introductions to clients interested in possible mergers, acquisitions, joint ventures, strategic alliances, product line divestiture, private label, technology licensing, due diligence, business plans and business market analysis.



Global Conventions provides a number of annual conferences and workshops related to the connector, cable assembly, backplane and related industries. Chief among these is the annual Fleck Connection Congress (FCC), the only technological management conference and the eminent annual global summit meeting for senior executives of suppliers and OEMs—along with several other seminars and conferences with emphasis on new technologies, distribution and materials.

GCRG's primary business objective is to serve as the gateway between clients and valuable technological and market information, providing vital industry exposure, presence and contacts.

GCRG is a privately-held company which has recently experienced over a 300% growth in sales revenues. With two offices in California and joint venture partnerships throughout the U.S., Europe and Asia, the company employs over 25 full-time and contract employees. *Global Fleck Korea*, located in Seoul, was established in 1997 in order to focus on and serve the growing Asian market. Expansion plans are scheduled to soon include France and Italy.

Fleck Research

Fleck Research focuses on providing detailed and updated market research information on the connectors, cable assemblies, backplanes and interconnect products and materials to suppliers, OEMs and distributors. *Fleck Research* ensures that information on the latest interconnect industry technological trends and innovations; global activity; new connector design challenges; market size; market forecasts; other key business activities; and invaluable sales tools are consistently circulated to its annual retainer clients.

With extensive databases on industry activity within North America, Europe, Japan, the Pacific Rim and rest of the world, *Fleck Research* provides information on new and explosive technologies impacting the industry; OEM activity; distribution, pricing, suppliers and industry demand sectors (such as computers, telecommunications, communications, datacom, military/aerospace, automotive, industrial, medical, instrumentation and others).

Partners, contacts and long-term relationships with industry gurus located in the Pacific Rim, Europe and throughout the U.S. enhance *Fleck Research's* ability to provide up-to-date, in-depth market information vital to its clients within the electronic industry.

Through its research reports, monthly *Fleck Report* newsletter, *Fleck Insight*, daily *FYIs*, weekly industry alerts, monthly *Interconnection News Abstracts* newsletter, and proprietary research programs—*Fleck Research* is the number one market resource to turn to within the interconnect industry.

Fleck Research also focuses heavily on OEM activity—the clients of interconnect suppliers—with the publication of *Did You Know?* releases containing OEM profiles, pricing and procurement; and the monthly *OEM News* featuring international activity within the OEM community, including market information, financial and economic activity, mergers & acquisitions, activity within individual demand sectors, and articles relating to cyberspace and executive travel. *The Interconnect Buyer* newsletter is circulated to thousands of OEMs monthly, providing financial results, new product releases, the latest technologies, connector pricing, profiles and other activity on connector manufacturers.

Other services include consulting services; strategic business planning; tailored clipping services; customer surveys; CD-ROM data availability; proprietary research programs; benchmark pricing information; job search guidance; and bulletin board access through the Internet.

Research Studies

Database Access

Benchmark Pricing
Information

Industry
Consultations

Bulletin Board
Access Through
the Internet

Publications

Fleck Report

Fleck Insight

OEM News

INAs

Did You Know?

FYIs

Alerts

New Product News

Interconnect Buyer

CD-ROM Data
Availability

Customer Surveys

Tailored Clipping
Services

Global *Connections*

Mergers

Acquisitions

Joint Ventures

Strategic Alliances

Private Label

Export

Path-to-Market

Sourcing

Product Line

Divestiture

Technology
Licensing

Due Diligence

Business Plans

Business Market
Analysis

Interconnect
Products

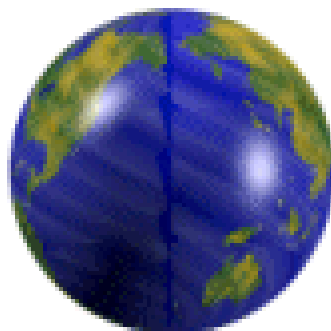
The *Global Connections Division* focuses on providing discrete and thorough industry introductions to clients interested in possible mergers, acquisitions, joint ventures, strategic alliances, product line divestiture, private label, export, path-to-market, sourcing, technology licensing, due diligence, business plan and business market analysis.

The *Global Connections Division* matches buyers and sellers and provides introductions for a potential merger or acquisition on a very confidential basis. The *Global Connections Division* is also involved in deals for those who wish to sell in unfamiliar markets, reach global market sectors, expand horizontally, divest a particular product line, pursue entirely new businesses, compare manufacturing processes, pool complementary resources—or audit any business area, including management, marketing, engineering, manufacturing and quality.



These services are provided to companies involved in the manufacture of connectors, cable assemblies, backplanes or interconnect devices, as well as other electronic components such as microwave switches, attenuators, filters, amplifiers, desktop video conference systems, LCD monitors, enclosures, relays, panels, probes, power supplies, memory package technologies (such as DRAM, SRAM and flash), mass storage devices, wire and cable, boxes, board assemblies, modems, hubs, and semiconductors.

The *Global Connections Division* has been involved in many of the industry's high-profile deals, including LPL's acquisition of Amphenol/Bendix/SpectraStrip; TRW's divestiture of Cinch; AMP's acquisition of Matrix Science; Framatome's acquisition of Burndy; Wasserstein Perella's divestiture of Elco to Kyocera; Molex's acquisition of Ulti Mate; DuPont's divestiture of its connector operations, now known as Berg Electronics; AMP's acquisition of OFTI; Berg's acquisition of AT&T's Microelectronics Division and their purchase of McKenzie from Kyocera and Socket Express; WPI's purchase of Viking Electronics; William Blair's purchase of Sherwood Enterprises; and Trompeter's purchase of Semflex, among many others.



The *Global Connections Division* provides the crucial contacts required with decision-makers and financial backers in order to consummate any business arrangement—and serves as the fastest and most efficient method to become introduced to potential candidates within the electronics, interconnect and semiconductor industries.

Global Conventions

The *Global Conventions Division* coordinates and presents numerous workshops and conferences throughout the year, designed to focus on the impact of technology trends on the connector, cable assembly, backpanel and interconnect industries.



The Fleck Connection Congress (FCC) is the only technological management conference and has become the eminent annual global summit meeting for senior executives and top-level strategists of manufacturers, suppliers, OEMs, distributors and contract manufacturers involved in connectors, cable assemblies, backplanes and interconnect

devices. The FCC provides an excellent opportunity for attendees to broaden knowledge of the industry and network with other executives.

The Fleck Distribution Congress (FDC) provides information on distributor point-of-sale by product type; distributor inventory turns, gross profit margins, geographic region breakdowns; and strengths, weaknesses and business strategies of leading connector manufacturers. Attendees obtain information on where connectors and cable assemblies are utilized; path-to-market analysis; and globalization.

The Fleck Materials Congress (FMC) provides industry information to materials and connector specifiers from connector manufacturers and OEMs; stampers; molders; platers; resin manufacturers; metals manufacturers; engineers on the edge of materials technology; and other raw material suppliers. Technological and market trends affecting metals, plastics and contact platings used in connector manufacturing and how materials requirements change are covered.



Various workshops are also held throughout the U.S., Europe and Asia/Pacific Rim focusing on important technology topics.

In addition, the *Global Conventions Division* conducts select on-site presentations to OEMs and suppliers within the industry.

Fleck Connection Congress (FCC)

Fleck Distribution Congress (FDC)

Fleck Materials Congress (FMC)

Workshops

On-Site Presentations



Technology *and Market Activity*

Computers

Telecommunications

Communications

Datacom

Consumer
Electronics

Industrial

Medical

Automotive/
Transportation

Government/
Military/Aerospace

Commercial
Aircraft

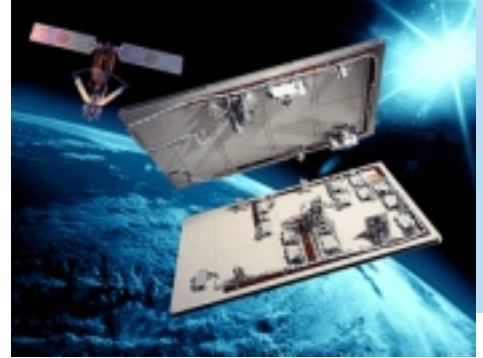
Instrumentation

Test and
Measurement

Global Connector Research Group focuses on every technological development or activity which in any way affects the business of its clients.

Explosive and increasing growth in electronics is a result of the rapid changes occurring in fiber optics, CATV, high-speed bandwidths, Ethernet, ATM, WAN/LAN, micro-processor speeds, miniaturization of packaging, captive vs. non-captive production, storage devices, wireless, satellite systems, navigation, bus changes, transition in PC main memory, shifts from parallel to serial, videoconferencing, DVD, integrated home entertainment systems and others.

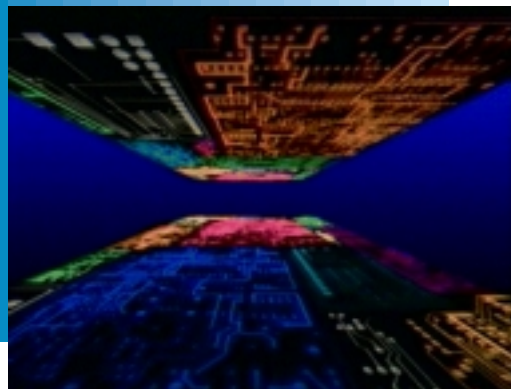
All of these technology trends in some way impact the design, development and use of connectors, cable assemblies, backpanels and interconnect devices.



Industry demand sectors closely monitored include **computers** (such as desktops, notebooks, subnotebooks, handheld, workstations, memory, servers, multi-user machines, storage devices, monitors, printers and peripheral devices); **telecommunications** (including central office, outside plant, premise, subscriber, videoconferencing and telephone); **communications** (such as cellular, cordless telephones, PCN/PCS, paging, satellite, mobile data terminals, wireless LAN, CATV, broadcast, navigation and mobile radio); **datacom** (including LAN, Ethernet, Token Ring, FDDI, Fibre Channel, network systems, mainframe networks, hubs, routers, switches and bridges); **consumer electronics** (including digital cameras, radio, TV and audio); **industrial** (such as controls, process controls and robotics); **medical equipment** (including diagnostic, therapeutic and patient monitoring);

automotive/transportation

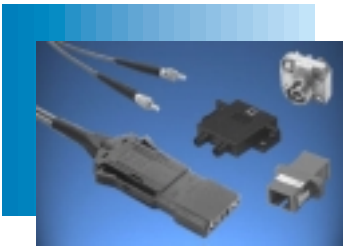
(such as passenger cars, vans, trucks, buses and off-road vehicles); **government/military/aerospace** (including military aircraft, missiles, space vehicles and defense electronic equipment); **instrumentation** (such as oscilloscopes, recorders, analog and digital instruments); and others.



Detailed and extensive databases are created and maintained on nearly 1,000 product lines utilized within these demand sectors, including printed circuit, circular, rectangular I/O, planar (IDC), RF coax, IC socket, microminiature, fiber optic and hermetic seal connectors. Application-specific connectors include telephone, power/industrial, filter, flex circuit, surface mount connectors, and board mount receptacles/pins, terminal block/modules, custom designs, customer use tools, CATV connectors, automotive connectors, backplanes, wire wrap panels, cable assemblies and wire vehicle harnesses.



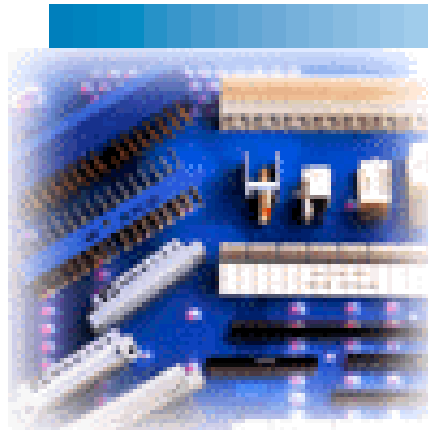
- Printed Circuit
- Circular
- Rectangular I/O
- Planar (IDC)
- RF Coax
- IC Sockets
- Microminiature
- Fiber Optic
- Hermetic Seal
- Telephone
- Power/Industrial
- Flexible Circuits
- Surface Mount
- Automotive
- Custom Designs
- CATV
- Backplanes
- Cable Assemblies



Over 30 countries and regions of the world are tracked, including the U.S., Canada, Germany, France, the U.K., Italy, Scotland, Sweden, Denmark, Norway, Finland, Benelux, Spain, Switzerland, Japan, Taiwan, Korea, Singapore, Hong Kong, Malaysia, Thailand, Indonesia, the Philippines, India, Australia, New Zealand, Mainland China, Brazil, Mexico and Israel.

Contacts and profiles are maintained on thousands of manufacturers, contract manufacturers, OEMs, assembly houses, materials suppliers, distributors and selling agents, including such companies as ADC Telecommunications, AMD, AMP, Amphenol, Arrow, AT&T, Avnet, Bay Networks, Berg, Boeing, Cisco Systems, Compaq, Cray Research, Delphi Packard, Digital Equipment, Ericsson, Ford Motor, Fujitsu, Hewlett-Packard, Honda, IBM, Intel, ITT Cannon, Lucent Technologies, Mitsubishi, Molex, Motorola, Nokia, Nortel, Qualcomm, SCI, SGS-Thomson, Siemens, Solectron, Sony, Sun Microsystems, Tektronix, Texas Instruments, Thomas & Betts, 3Com, 3M, Toshiba and Toyota.

Numerous trade shows and factory visits are scheduled throughout the year in all of these regions. Annual trade shows include Comdex, Productronica, Wireless Trade Show, Consumer Electronics Show, Nepcon, OFC, EDS, Semicon, IPC Trade Show, National Broadcasters Show, Medical Design & Manufacturing, and Western Cable TV Show.



The GCRG *Professional Staff*

Principals

Customer Service
and Client Support

Market Researchers
and Analysts

Sales and
Presentations

Marketing

Public Relations

Contract
Consultants

Computer
Programmers

Administration

Computer
Graphics and
Advertising

Technical Writers

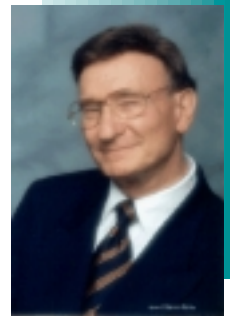
Information Systems

Global Connector Research Group (GCRG) is comprised of a professional staff of approximately 30 team members—located throughout California and in South Korea—ranging from market researchers, analysts and sales and marketing experts, to computer programmers, administrative, computer graphic and public relations specialists.

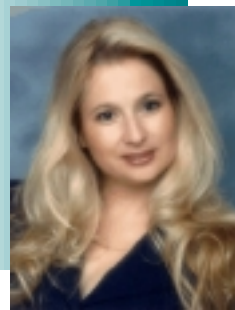
GCRG's management emphasizes customer service and support, and operates under the philosophy that a cohesive, efficient team is mandatory in order to provide timely, accurate and professional services to its clients in the industry.

The Principals

Ken Fleck, Chairman and Founder, has been active in the interconnect industry for nearly 50 years. Mr. Fleck held a variety of general management and senior management positions with ITT Cannon spanning 22 years, including positions as General Manager over manufacturing facilities, Director of Engineering, and Director of Business Planning.



In 1981, Mr. Fleck founded Fleck International, the first research company focused exclusively on connectors, cable assemblies and backplanes. Today, Fleck International is known as Fleck Research, one of three divisions of Global Connector Research Group. Mr. Fleck continues his research efforts, including technical oversight; advice to the industry related to technological trends and their impact on interconnect products; and presentations at seminars and workshops throughout the world.



Monalisa Berbey, President and CEO, has been active in the electronics industry for over 10 years, the majority of which has been in the semiconductor industry. Previous responsibilities included sales, engineering and P&L, along with establishing strong relationships with Intel, AMD, VLSI, Sematech, Motorola, IBM, Rockwell, Digital and others.

In 1993, Ms. Berbey was elected president and CEO of Global Connector Research Group, where she is responsible for the executive direction of the three subsidiary companies, Fleck Research, Global Connections (mergers acquisitions and joint ventures) and Global Conventions (FCC, workshops and seminars).

Ms. Berbey has achieved global recognition within the electronics industry for her efforts in structuring mergers, acquisitions, joint ventures, partnerships and licenses. Ms. Berbey has established close working relationships with financial institutions, manufacturers of components, manufacturers of original equipment, distributors and vendors.

GCRG *Client Base*

Global Connector Research Group's client base consists of leading worldwide interconnect manufacturers, distributors, OEMs, raw materials manufacturers and financial institutions.



Whether a leading interconnect supplier—such as AMP, Berg Electronics or Molex—or an OEM, such as IBM, National Semiconductor or Motorola—all of GCRG's clients are important and their needs immediately addressed.



Global Connector Research Group believes in continually keeping abreast of the latest technology developments, changes and business activities within the electronic industry in order to expand upon the types and quality of services it provides to clients.



- Connector Manufacturers
- Cable Assembly Manufacturers
- Backplane Manufacturers
- Distributors
- Original Equipment Manufacturers
- Cable and Wire Manufacturers
- Component Manufacturers
- Materials Suppliers
- Assembly Houses
- Contract Manufacturers
- Financial Institutions
- Service Companies

