

AgustaWestland N.V. - Strategy Brief - 2015 - Key Strategies & Plans

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Abstracts

The report provides comprehensive insights into the overall, near term Strategy Focus and Key Strategies & Plans for AgustaWestland N.V. against the backdrop of an evolving industry landscape with the military helicopters segment facing continued budgetary pressures across most traditional markets with new procurement activity mostly limited to fleet replacement with preference for proven, in-production & derivative platforms as against scratch up programs besides continued technology development over new, radical & next generation programs & platforms like the S-97 Raider & the V-280 Valor. The commercial helicopter segment, on the contrary, continues with steady growth driven by strong fundamentals & demand drivers.

The evolving role of helicopters as significant force multipliers with their rapidly increasing capabilities, especially, with the rise of rotorcrafts, & their increasing indispensability for conducting a wide range of military operations & missions and the rapidly evolving nature of threat perception from symmetric to asymmetric has made their presence formidable with the battlefield boundaries becoming increasingly nebulous. The imminent, significant replacement demand for ageing military helicopters emanating from traditional as well as emerging markets and continued, strong R&D activity driven technological developments & innovations are likely to be the key demand drivers over medium term for military helicopters & rotorcrafts despite ongoing, significant pressure on defense budgets across most traditional markets. The development of experimental compound helicopter platforms, especially, the self-funded X2 program by Sikorsky & X3 by Airbus Helicopters; have already heralded the beginning of a new technological era as well as leap for military helicopters, in terms, of operational spectrum & capabilities.

Additionally, the Ukraine crisis has triggered concerns with respect to defense

capabilities & has heightened threat perception amongst a number of European states, based in Northern & Eastern Europe, led by Poland & Norway, which are focusing on building up military capabilities rapidly to counter growing Russian threat in the region which is likely to drive an increase in defense spending across Northern & Eastern Europe over near term; as highlighted by Poland's latest \$3 billion multi-role helicopter program. Russia's defense budget is projected to grow to 4% of its GDP by 2016 while Chinese defense spending, too, continues to spiral up with China's growing regional influence in the APAC region driving defense spending across a number of key nations in the region; as reflected in Japan's recent V-22 purchase decision and significant investments towards strategic ISR assets besides growing export sales for Sikorsky's S-70/MH60R/S Seahawk program in the region.

The global civil helicopter & rotorcraft segment, on the contrary, is being driven by the development of new helicopter platforms by OEMs offering enhanced performance capabilities while reducing operating economics significantly, foray into entirely new segments, like, Super mid-size besides significant growth in global oil & gas exploration activity driven by growing oil demand from key Asian economies, an ageing global civil helicopter fleet deployed in the oil & gas exploration sector and growing demand from the EMS, Law Enforcement & VIP Transportation segments, especially, across emerging markets. About 4,800 to 5,500 new civil helicopters are projected to be delivered globally through the 2014-2018 period with North America projected to lead the demand for new civil helicopters. However, stalled recovery in the EU & slowing down of the world economy besides stalling of Brazilian economy and infrastructure issues & political crackdown on conspicuous spending in China pose significant threats over near term.

Relevance & Usefulness:

Against this backdrop, the report provides key insights into the near term strategy focus and key strategies & plans being conceptualized & implemented by AgustaWestland N.V. The report provides inputs to be incorporated into the broader strategic planning & decision making processes and will be essential from a competitive analysis standpoint as well.

The report will be useful for:

Competitive Assessment as well as Comprehensive Strategic Business Analysis

Assessment of Degree of Environmental Responsiveness as well as overall,

near term Strategy Focus

Key Inputs for Strategic Planning & Decision-Making Process

Analysis of and Insights into key Strategies & Plans being conceptualized & pursued by the company

Identifying & highlighting areas for Strategic Changes, Adjustments & Realignment

Gaining a Strategic Perspective on the Business & Strategic Outlook for 2015

Access to Key Industry Trends, Issues & Challenges, Risk Factors & Industry Outlook for 2015

For Whom:

The report is a niche, key & vital resource on the Business Strategy Domain given its unique disposition & strategy focus. The report would be quintessential for those associated with and having strategic interest in the Global Aerospace & Defense Industry and/or Helicopter Manufacturing. The report will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, Industry & Company Analysts, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists & all those associated with the Global Aerospace & Defense Industry, Helicopter Manufacturing or the company.

Report Highlight:

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

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Strategic Outlook

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