

Strategy Orientation - Civil Helicopters & Rotorcrafts - 2014 - World's 5 Leading Civil Helicopter & Rotorcraft Manufacturers - Key Strategies, Plans, Strategic Focus, Trends & Insights, Strategic Outlook - Airbus Helicopters, AgustaWestland, Bell, Sikorsky, Russian Helicopters

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Abstracts

1. The Global Civil Helicopter Segment being Driven by the Development of New Platforms by OEMs & Replacement Demand emanating from the Offshore Oil & Gas Exploration Sector:-

The global civil helicopter & rotorcraft industry segment is being driven by the development of new helicopter platforms by OEMs offering enhanced performance capabilities while reducing operating economics significantly. Key global OEMs are deploying an array of strategies aimed at enhancing cost effectiveness at their end while simultaneously optimizing value for their global operator base.

Helicopter Platform Strategy:

OEMs are increasingly pursuing a Helicopter Platform/Family Strategy aimed at reducing the development & production costs by leveraging commonalities across components & systems while simultaneously also reducing the training & operational costs for the operators. Eurocopter's Super Puma family & AgustaWestland's helicopter family triad comprising of AW139, AW169 & AW189 have seen significant success over the recent years. Industry OEMs have been placing greater significance on the civil segment with defense budgets under pressure globally. AgustaWestland, for instance, is likely to witness & is preparing for a significant shift with its revenues likely

to be split 50:50 amongst military & civil segment by 2021 as against 75:25 at present. Additionally, AW's upcoming AW609 tiltrotorcraft and the pursuit of advanced R&D projects, like Project Zero, incorporating cutting-edge technologies, besides the development of experimental compound helicopter platforms by Sikorsky & Eurocopter with their X2 & X3 programs is likely to have a significant impact on the evolution of the civil helicopter & rotorcraft segment over medium term.

Common Platform Architecture Strategy for Civil & Military Helicopter Segments by OEMs:

OEMs are also increasingly pursuing a common platform architecture strategy for civil & military helicopter segments intending to jettison development costs involved in scratch up programs and creating an affordable, customizable military helicopter solution package amid ongoing pressure on defense budgetary spending. The Super Puma helicopter family by Airbus Helicopters (formerly Eurocopter) & the development of military versions of the AW139, AW169 & AW189 programs by AgustaWestland are prominent examples of the same.

Further, the industry OEMs are also working towards diversifying their global industrial footprint with the setting up of JV based manufacturing facilities across emerging markets to capitalize on potential growth opportunities effectively besides reinforcing & expanding their global service & sustainment support infrastructure to sustain anticipated business growth.

2. Report Overview & Rationale:

The report assesses the overall Strategic Positioning for the 5 leading global industry OEMs; analyses their overarching Strategic Orientation as well as Focus over near to medium term and provides Strategic Insights into the Key Strategies & Plans being crafted & pursued by them.

3. Report Excerpts and Key Trends as well as Themes covered by the report:-

- a. Comprehensive Analysis of the Pursuit of Helicopter Platform/Family Strategy by OEMs
- b. Analysis of the Common Platform Architecture Strategy for Civil & Military Helicopter Segments by OEMs
- c. Reinforcement & Expansion of Global Service & Sustainment Support Network by Industry OEMs

- d. Potential significance of the opening & expansion of Chinese Low-Altitude Airspace as well as pursuit of other Civil Aviation Reforms and the analysis of Strategic Significance for the Industry & OEMs strategies with respect to the same.
- e. Significant Replacement Demand likely to originate from the Offshore Oil & Gas Exploration Sector.
- f. Dynamics of Global Oil Demand and Potential significance for the Global Offshore Oil & Gas Exploration Sector in 2014.
- g. Carbon Neutral Growth (CNG) 2020 directives for the Aviation industry, targets for 2050 & significance for the industry.
- h. Analysis of Key Industry as well as Technological Trends likely to shape the industry's future.

4. Relevance & Usefulness: Provides Inputs for Incorporating into Broader Strategic Planning & Decision-Making Process.

The report will be useful for:

Key Inputs for Strategic Planning & Decision-Making Process

Competitive Analysis & Strategic Benchmarking Exercise

Comprehensive Strategic & Competitive Assessment and Analysis of Strategy Orientation for each key OEM

Strategic Insights into key Business Strategies & Plans being pursued by each key OEM

Gaining a Strategic Perspective on the Business & Strategic Outlook for all key players for 2014

Gaining access to Key Industry Trends & Insights; Crucial Inputs for Decision-Makers

Identification & Analysis of Potential Growth Opportunities & Avenues

Gaining access to Key Industry Issues, Challenges & Risk Factors

Identifying & highlighting areas for making Strategic Changes, Adjustments & Realignment

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics

Gaining a Strategic Perspective on the Industry's Strategic Outlook for 2014

5. For Whom: Key Decision-Makers across Industry Value Chain

The report would be essential for those having strategic interest in the Global Civil Helicopter & Rotorcraft Industry Segment & 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 & those associated with the Industry.

6. Report Highlights: Visual Representation/Orientation with a Slide based Architecture

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations with visual representation & orientation based on a slide architecture, 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.

7. Key Takeaways: Enhanced Scope of Utilization & Application with Visual Representation

This PowerPoint architecture based report provides high readability & ease of navigation and saves significant amount of time by saving the end-user the effort of sifting through voluminous pages of text besides enhancing the scope of retention, utilization & application of analysis with visual representation and incorporation of relevant images to support & supplement the analysis.

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