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Strategy Orientation - Military Helicopters & Rotorcrafts - 2014 - World's 6 Leading Military Helicopter & Rotorcraft Manufacturers - Key Strategies, Plans, Strategic Focus, Trends & Insights, Strategic Outlook - Airbus Helicopters, AgustaWestland, Bell, Sikorsky, Boeing, Russian Helicopters

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Abstracts

1. Industry Overview & Backdrop:

Global Military Helicopter & Rotorcraft Segment Driven by Expanding Role in Force Structure, Extension of Capabilities Driven by Development of Cutting-Edge Platforms as well as Technologies & Global Replacement Demand :-

The global military helicopter & rotorcraft segment globally is being driven by rapidly expanding role of helicopters in the overall force structure of armed forces globally with the showcasing of their capabilities for conducting a broad range of anti-terrorism directed military operations & countering a wide range of asymmetric threats during the allied war on terror across Iraq & Afghanistan war theatres during the first decade of this century.

Additionally, 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 development of experimental compound helicopter platforms, especially, the self-funded X2 program by Sikorsky & X3 by Eurocopter have already heralded the beginning of a new technological era as well as leap for military helicopters, in terms, of operational spectrum & capabilities.

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 imminent, significant replacement demand for ageing military helicopters emanating from traditional as well as emerging markets and strong R&D activity driven technological developments & innovations are likely to be a strong demand driver over medium term for military helicopters & rotorcrafts despite the ongoing, significant pressure on defense budgets across most traditional markets. The upcoming Armed Aerial Scout (AAS) program & the JMR (Joint Multi-Role) Technology Demonstration Phase (TD) for the FVL (Future Vertical Lift) program of the U.S. Army are going to be crucial for the industry's future in North America despite facing threats of cancellations or substitution from existing, in-service programs on economic grounds over short term.

2. Report Overview & Rationale:

The report assesses the overall Strategic Positioning for the 6 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 to partially offset ongoing spate of defense spending cuts across most traditional markets & navigate their way through a difficult defense spending scenario. Key cornerstones of their strategies include:

Aggressive Pursuit of International Export Opportunities

Development of New Product Variants & Technological Innovations

Strengthening of Civil Segment Business with Reallocation of Resources as well as Assets

Teaming up Agreements & Formation of Strategic Alliances for Pursuit of New Defense Contracts

3. 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

4. Report Excerpts:

a. Comprehensive Analysis & Insights into the Strategies & Plans being Crafted & Pursued by Industry OEMs to Offset Ongoing Spate of Spending Cuts.
b. Strategies & Plans by OEMs to Derive Further Business Growth.
c. Growing Significance & Pursuit of International Export Opportunities for Industry OEMs.
d. Development of Common Platform Architecture for Military & Civil Helicopter Segment by OEMs to Contain Costs.
e. Focus on Optimization & Reallocation of Resources as well as Assets amid Ongoing Budgetary Pressures.
f. Analysis of Key, Upcoming U.S. Military Helicopter Programs, especially, Armed Aerial Scout(AAS) & JMR(Joint Multi-Role) TD Phase for the Future Vertical Lift (FVL) program with Insights into & Analysis of Strategic Developments.
g. Asia-Pacific Region to Spearhead & Drive Significant Demand for Military Helicopters over Near Term.
h. Analysis of Key Industry as well as Technological Trends Shaping the Future of the Industry.

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

The report would be essential for those having strategic interest in the Global Defense & Aerospace Industry & 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

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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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