

CLIENT RESULTS & SUCCESS STORIES

CASE STUDY : ADVISORY AND
CONSULTING SERVICE CAPABILITY
– AEROSPACE & DEFENCE SECTOR

January , 2017



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About Client Success Story



“ Examine the opportunity for growth and transformation in India’s defence manufacturing sector. Deep dive of player wise participation matrix and their market share in Indian defence industry and the track of key capability benchmarks ”

Client Introduction:

The client is one of India’s leading companies for supply of Defence equipment and systems in the private sector, with close to thirty years of work experience in this field. Client’s capabilities include indigenous design to delivery solutions across the Defence spectrum from land based weapon launch systems , air defence & artillery systems and upgrades to naval weapon launch systems with fire control solutions , bridging systems , communication , avionics, C4I and missile systems. The client also offers specialized turnkey defence construction solutions like underground structures , military bases, storage depots, smart infrastructure and modernization of existing facilities. Additionally, its infotech offering provides seamless integration of solutions that enhance both administrative and tactical efficiency of the armed forces.

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Client's Issues, Challenges & Our Solution



Collaborative Approach

Lack of communication & collaboration are some of the major roadblocks to a quality deliverable. We at enicon follow a proactive & collaborative approach right from the early stage of a client's engagement. As it not only brushes off the chances of misunderstandings in the scope but also helps in delivering to the client's expectations.

Client Challenge 01:

Make in India (MII) has given enough fillip to strengthen the “*manufacture ring*” in India. Like many other manufacturing industries in the country, Indian defence segment is also projected to be one of the highly investment attracting industry under MII umbrella. India has been rapidly expanding its expenditure on defence sector year on year. Infact, at present the country stands to be the third largest defence spender in the world after US and China. It is pertinent to note that the spending on equipments by Ministry of Defence has increased by 15-20% over the last five years and is projected to grow at a much escalated speed in near future. Given such progressive scenario the client wishes to develop a holistic understanding of the defence equipment manufacturing market outlook for India till 2022.

Solution 01:

To the problem statement indicated by client, the approach followed by enincon was to distinctively study the current market share demand & supply of land defence system equipments, naval defence system equipments, aerospace system equipment and electrical defence system equipments. For this, Primary Research Team conducted F2F interactions and Structured Questionnaire Based Interviews to fetch the desired details from multiple level filtering. Basis the outcomes of the primary feed and in house study a triple B (Base- Bull- Bear) scenario wise outlook was evolved till 2022.

Client Challenge 02:

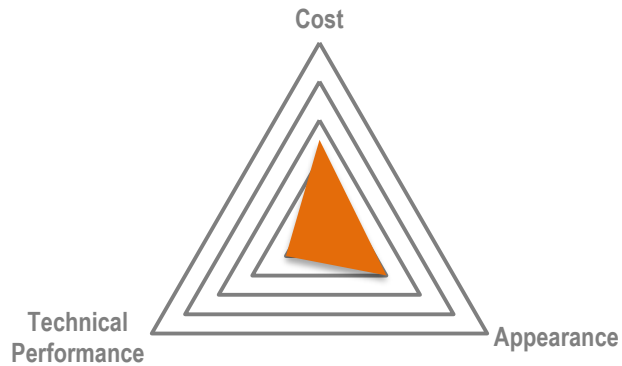
The client wishes to learn about the player's participation mix in India's defence manufacturing segment and their market share. Evaluating the competition profile of the OEMs into India's defence industry was also one of the key concern of the client.

Solution 02:

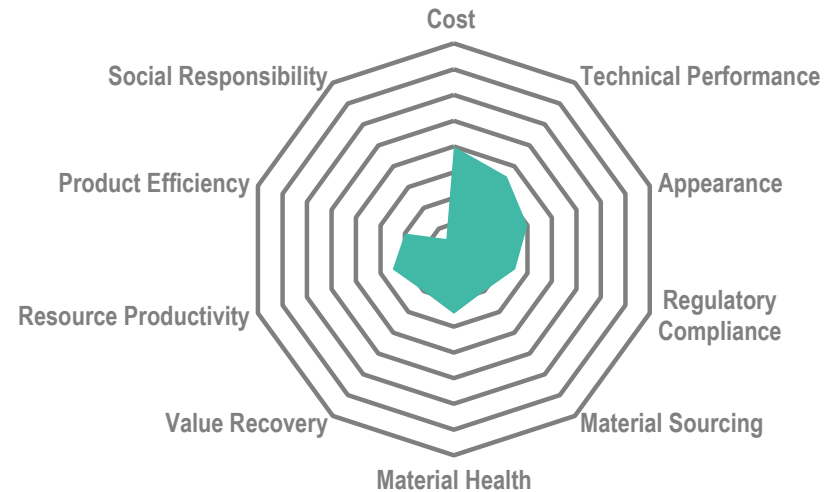
To the problem statement indicated by client, the approach followed by enincon was to identify all the major international and domestic OEMs into India's defence manufacturing industry, deeply examine their manufacturing capabilities and competitive edge of the industry participants to the client. Further, the detail examination of any association was done for existing OEMs which might alter the competitive structure of defence manufacturing market in India by forming a cartel and can be disruptive for the client. For this, our Primary Research Team conducted F2F interactions and Structured Questionnaire Based Interviews to fetch the desired details from multiple level filtering shall done for different regions to examine the present players presence in India's defence manufacturing space

Indicative Sample for the Key Product Differentiation Parameters Identified

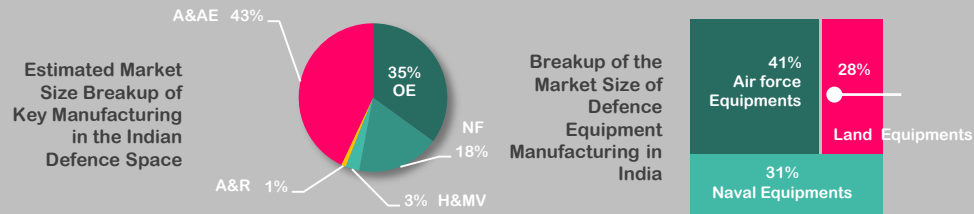
Initial Conventional Product Differentiation Parameters in India's Defence Manufacturing Space



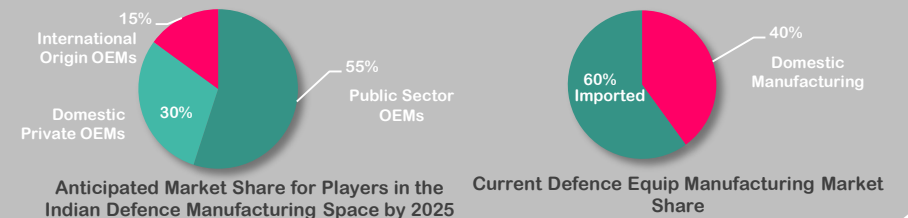
Current Expanded Product Differentiation Parameters in India's Defence Manufacturing Space



MARKET SIZE ESTIMATIONS OF DEFENCE EQUIPMENT MANUFACTURING



DEFENCE MANUFACTURING MARKET SHARE IN INDIA





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Happiness does not come from doing easy work but from the afterglow of satisfaction that comes after the achievement of a difficult task that demanded our best

- Theodore Isaac Rubin

