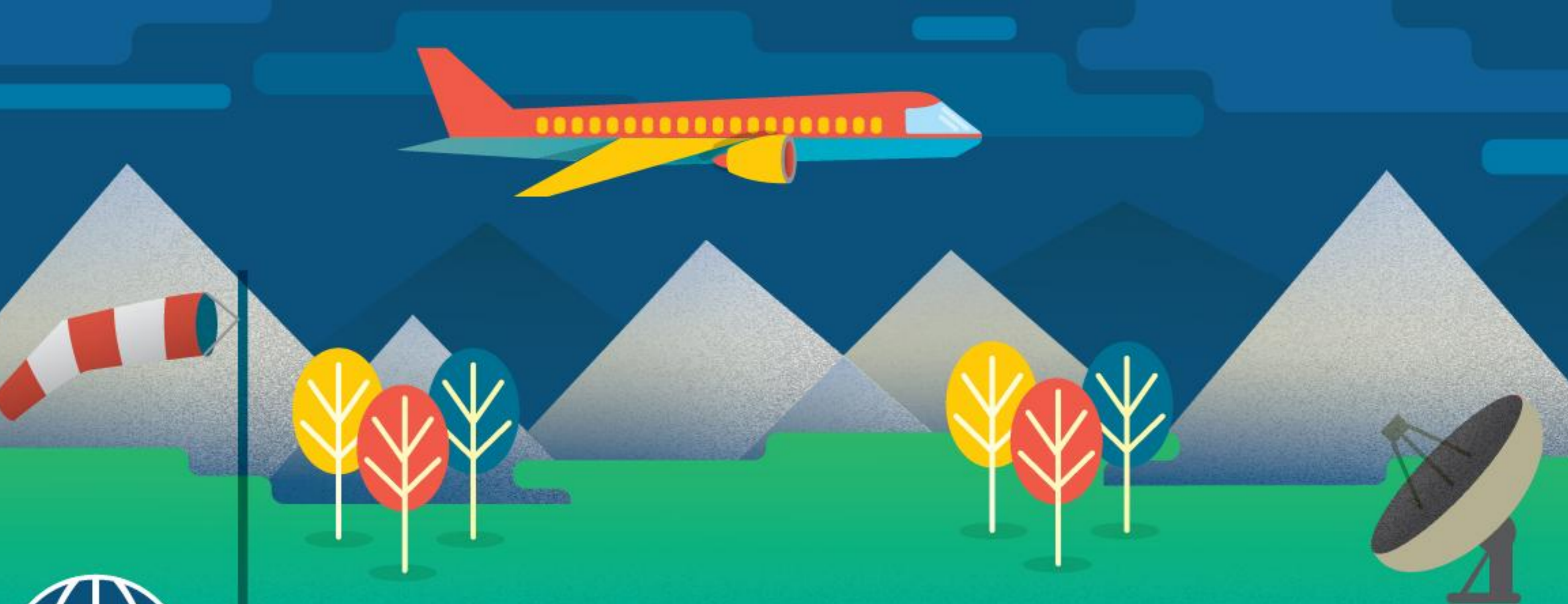


PROPELLING THE FUTURE

Analysing the Aerospace and Defense Market



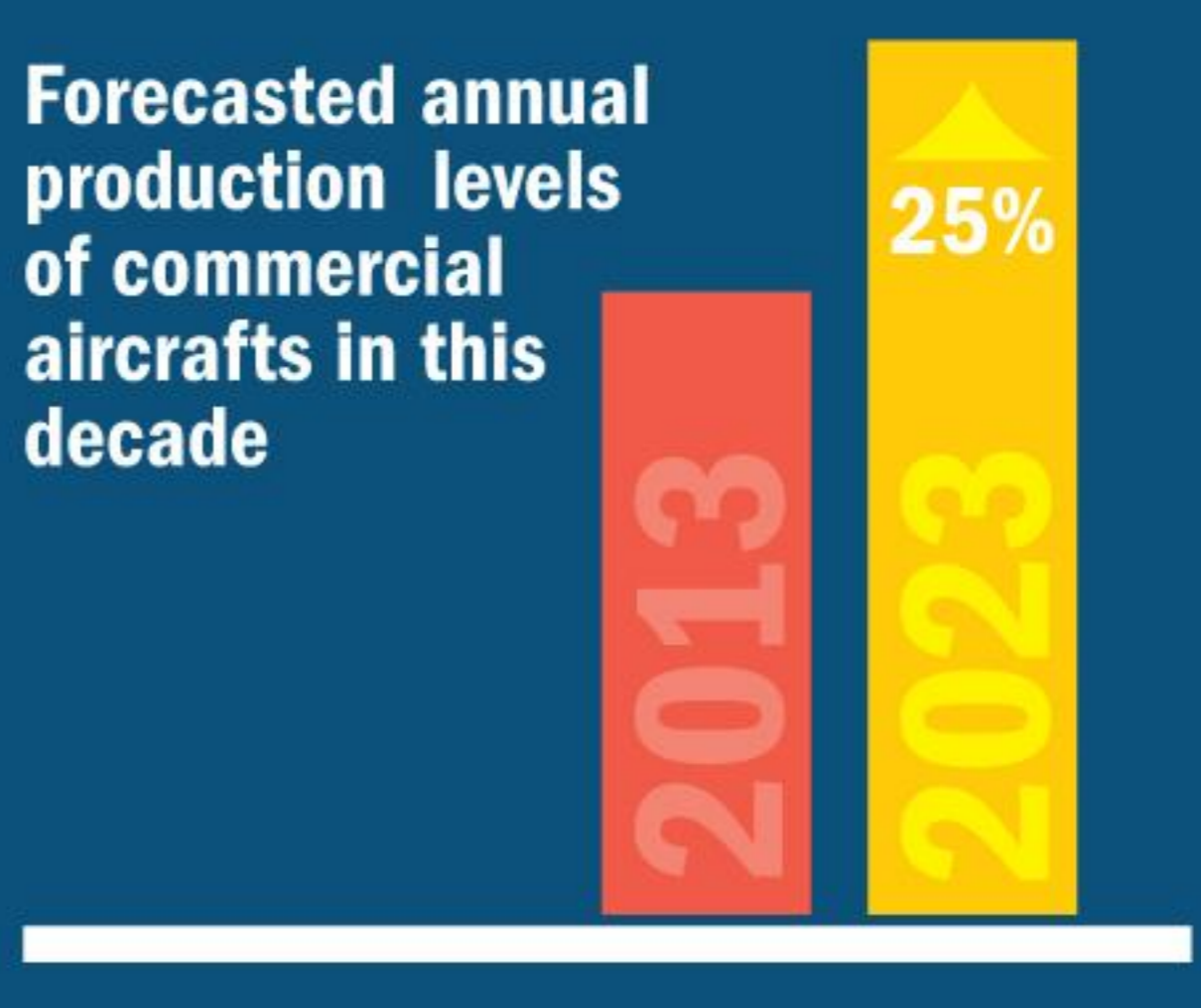
Global Forecasts

R&D related to improving fuel efficiency, operating costs and production of commercial aircraft will continue to benefit from the growing demand for global air travel

Benefits

- FUEL EFFICIENCY
- OPERATING COSTS
- PRODUCTION OF COMMERCIAL AIRCRAFT

GROWING DEMAND FOR GLOBAL AIR TRAVEL



Revenue growth in next 1 year

5% Aerospace

2.5% Defense

UAVs, Mobility, Geospatial, Cyber Security, Sensors and Migration to 4G/LTE are the key growth drivers of the C4ISR market



Technology trends in Aerospace & Defense

Increasing importance of inflight experience

BYOD, seat-centric IFE, mood lighting, touch screen panels for flight attendants, better content for IFE, etc.

Adoption of new age technologies like mobility and analytics

leading to advancements in Integrated Vehicle Health Management (IVHM), smart EFBs, etc.

Air traffic control modernization

Green sky initiatives leading to newer cockpit in avionics technologies. E.g. ADS-B, etc.

Evolution continues

from mechanical airplanes to mechatronics, software and application led systems. E.g. Cockpit apps, etc.

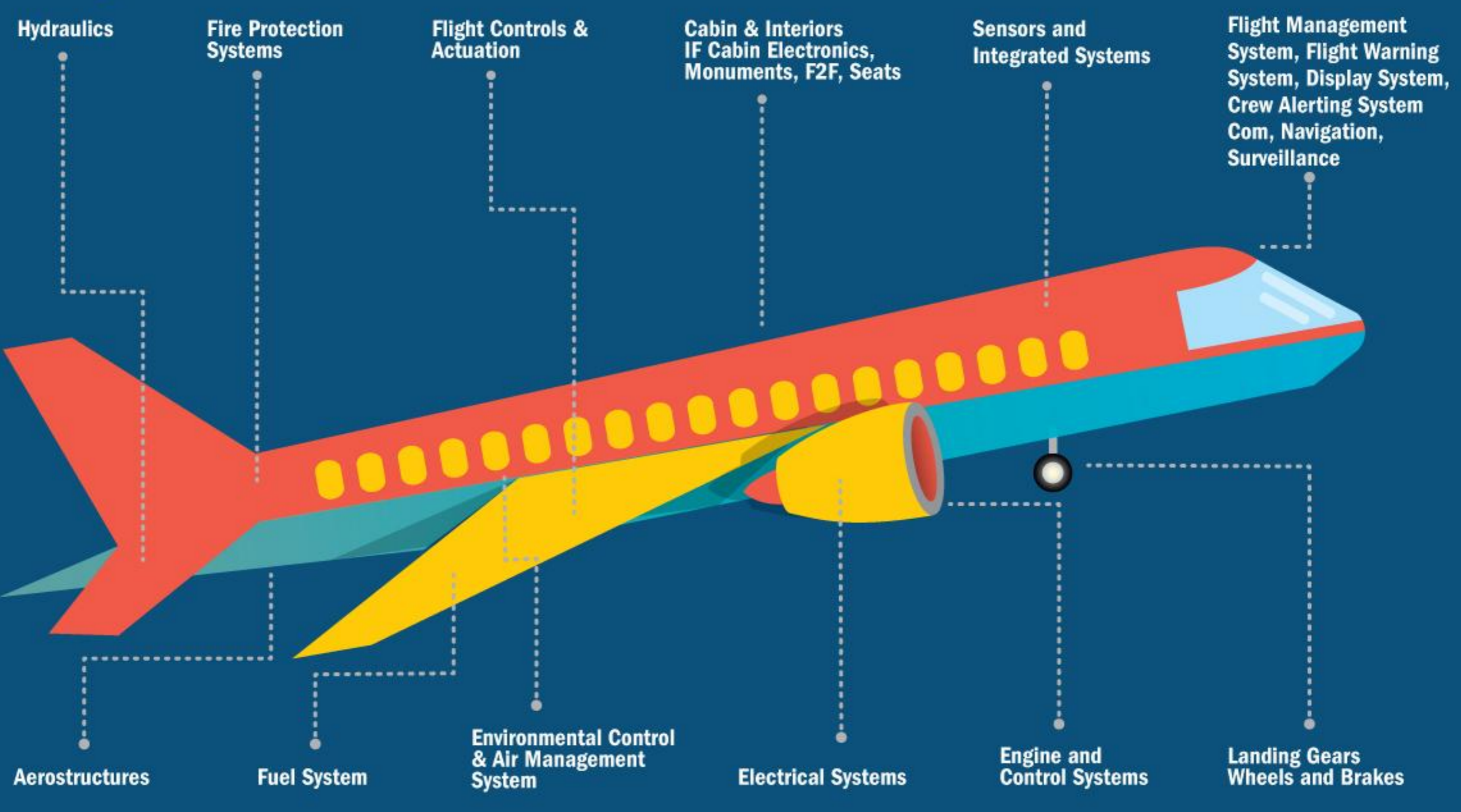


A&D industry @ HCL ERS

<p>DO-178C</p> <p>Only Indian Company in the DO-178C Committee</p>	<p>8/10</p> <p>Partners with 8 of the top 10 A&D companies</p>	<p>1500+</p> <p>Projects executed across 25 aircraft programs</p>	<p>\$25Mn+</p> <p>Investments made into generic as well as functional labs</p>
<p>11</p> <p>Customer specific dedicated offshore engineering centers & 3 ITAR compliant service delivery centers in USA</p>	<p>40+</p> <p>Preferred transformation partner to 40+ Aerospace companies</p>		



System And Sub-system Exposure



Proven Expertise

For a leader in the Aerospace industry

Participated in a new aircraft development program with unique risk sharing model with over **4 Mn.** hours of engineering effort:

- 38%** of onboard software has HCL imprint and **>80%** of the project is executed from ODCs
- \$250+ Mn.** Non Recurring Engineering (NRE) cost savings
- \$125 Mn.** offset credit to Indian Govt.
- 25+** complete software life cycle projects executed with over **15 SOI audits** supported for Designated Engineering Representative/Federal Aviation Administration (DER/FAA)

For an OEM in Europe's military transport aircraft industry

Redesign of the complete airframe:

- Successful introduction of more than **20** major structural modifications
- Direct Cost savings of over **40%** to customer and **4%** reduction in aircraft weight
- One stop for multi-functional requirements including design, stress analysis, value engineering, manufacturing engineering including assembly tooling
- > 90%** offshore with seamless coordination at customer site delivering substantial cost savings

For more details, email us at contact.ers@hcl.com