

# An Overview of the Aviation Industry in India with Special Emphasis on Privatization

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**Area of the Paper:** Business Management.

**Type of the Paper:** Research Case Study.

**Type of Review:** Peer Reviewed as per [C|O|P|E|](#) guidance.

**Indexed In:** OpenAIRE.

**DOI:** <http://doi.org/10.5281/zenodo.4271140>.

**Google Scholar Citation:** [IJCSBE](#).

## How to Cite this Paper:

Pavithra Kumari & Aithal P. S. (2020). An Overview of the Aviation Industry in India with Special Emphasis on Privatization. *International Journal of Case Studies in Business, IT, and Education (IJCSBE)*, 4(2), 220-228. DOI: <http://doi.org/10.5281/zenodo.4271140>

## International Journal of Case Studies in Business, IT and Education (IJCSBE)

A Refereed International Journal of Srinivas University, India.

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### ABSTRACT

Aviation industry in India is presently an expeditious growing industry in India visually perceived according to the report in the last three years. So, India is well-known as the third largest domestic aviation market in the world and is foreseen to be the third largest air passenger market by the end of 2024. To work toward the requirements of the flyers, Government of India is working toward incrementing the number of airports. In 2019, India is reported to have 103 operational airports, with a considerable increase in the airplanes too. The Indian government has plans to invest more to develop the aviation industry with various strategies. Although tremendous achievements are seen recently, still more gaps in development have to be filled. With the increased demand in air travel, India's aviation industry by 2038 might need 2,380 new commercial airliners. In this paper, the aviation industry in India with special emphasis on privatization process is discussed and analyzed.

**Keywords:** Aviation industry, Airports, Air travel, Developmental strategy in aviation.

### 1. INTRODUCTION :

Globalization has topped as the key mechanism in the development of tourism, which has stepped in almost all areas like promotion of products, job enhancement, health sector and tourism. We witness the huge connectivity in the International markets in the present situation. This has marked the history in the aviation market. India currently is found to be the 9<sup>th</sup> largest in aviation Industry, which is managing 41 million International passengers and 121 million national passengers. This owes to the fact that India is operating more than 85 International airlines with more than 40 countries [1]. Discussing the Industry of Aviation, it is understood that it has presently become the essential link for national and International travel and trade, which was once the elitist activity due to the cost. Hence aviation industry is especially important, for the economic development of the Nation because of the opportunity to increase business activity.

### 2. OBJECTIVES & METHODOLOGY :

The main objectives of this paper are:

1. Understand the functioning of aviation industry in India.
2. To know the growth and development of civil aviation in India
3. To make ABCD analysis of PPP model
4. The contribution of the PPP model towards the future growth of aviation industry.

### 3. AVIATION INDUSTRY IN INDIA :

The history of Indian Aviation states back to 1912, December, when the first domestic flight flew between Karachi and Delhi. It commenced when the Indian Air facilities collaborated with the UK predicated imperial airways as an extension of London Karachi flight of the Imperial Airways. Hence three years the provision commenced with the designation of Tata Sons Ltd, the first Indian airline from Karachi and Madras. There was no backing from the Indian government [2].

In 1953, under the purview of the Indian Government Indian Airlines served the domestic civil aviation. During

independence time, 9 air convey companies carried air cargo and the passengers within India. In 1948, the Indian regime and Air India together set up a company. Till the mid of 1990's government possessed airlines controlled Indian aviation industry. In 1990, the government of India implemented the open-sky policy and followed the liberalization rules. This paved the road to expeditious transformation in aviation industry.

If we analyze the market size of the aviation industry in India, it is seen that the passenger traffic rated at 341.05 million in fiscal year 2016. The compound yearly growth rate of 11.13 percent in the course of 2016 to 2020. As per the report, the air traffic increased at a compound annual growth rate of 5.32% from the fiscal year 2016 to 2020. It is assumed to reach to 7.27 % in 2023. The aircraft movement increased in the rate of 9.83% in domestic aircraft and 3.57% in international aircraft from FY16 to FY20.

Hence this development required a need of extra infrastructure, hence, in 2019, India had 103 operational airports. More airplanes operating in the sector is also a rising demand. With the increase in the infrastructure, the investment also was demanded. So according to the statistics produced by the Department for Promotion of the Industry and Internal Trade (DPIIT) [2], Overseas Direct Investment grown up to US\$2.75 billion amidst April 2000 and March 2000. The regime has promoted 100% FDI under the automatic route in scheduled air travel facilities, regional air travel service and national scheduled passenger airline. This venture is assumed to reach 35,000 crores in the subsequent four years. So, it is planned by the government of India, to invest US\$ of 1.83 billion to develop the airport infrastructure along with the aviation navigation services by 2026.

#### 4. RELATED WORK :

A scholarly journal is a journal that contains papers written by experts in a specific area of study. It contains authoritative information and may include extensive records of research, data, overviews, expert opinions on topics or topics. Table 1 lists a number of key academic publications and issues related to various sectors of the airport industry and its operations.

**Table 1:** Publications by various scholars on various Airport issues

Sl. No.	Area	Issues	Reference
1	Aviation industry	Aimed to encourage PPP model in India for the futuristic growth of airports.	Viswanath A. et al. (2008) [3]
2	Process	A current scenario of aviation industry in India.	Anubhav Singh, (2016) [4]
3	Strategy	Airbus A380-800, its role as full-service network carrier's commercial operations and its design of route network.	Glenn Baxter, et al. (2018) [5]
4	Service Quality	Study on service qualities provided in different air ports in India	Ipseeta Satpathy, et al. 2017 [6]
5	Privatization	Study made to know that the privatization adds financial value to the economy.	Hans-Arthur Vogel, (2011) [7]
6	Strategy	Discovering the Social, Economic and Technical Condition of Indian Aviation Industry.	Ashutosh Kolte, et al. (2009) [8]
7	Aviation industry	PPP model development. A perspective for infrastructure development in an airport.	Sambrani, V. N. (2014) [9]
8	Strategy	In a service-oriented sectors Indian Aviation Industry is becoming economically growing industry.	Anuradha Yadav. (2013) [10]

9	Strategy	Information Communication Technologies playing major role in tourism.	Deepthi Shanker. (2008) [11]
10	Aviation industry	Implementing the PPP model to elongate subways.	Soliño, A. S. et al. (2009) [12]
11	Perception	Adaptation of passengers' perceptions of airport for improvement of service quality.	Jin-Woo, P. et al. (2011) [13]
12	Aviation industry	Adoption of PPP model for the Greenfield airport development.	Rajan, T. A. et al. (2009) [14]
13	Aviation industry	Investment opportunities in the next phase of development through privatization of airports in India.	Raghunath, S. (2010) [15]
14	Privatization	Economic regulation for healthy competition amongst government owned, PPP-based & Private Airports in India.	D.P. Singh, et al. (2015) [16]
15	Perception	PPP model is more suitable for public service sector in terms of cost saving rather than another sector.	Riess, Armin. (2005) [17]
16	Infrastructure	PPP model concentrate more on infrastructure development and help to attract more tourist.	Suat Teker, et al. (2012) [18]
17	Infrastructure	To provide more facility to the customer PPP model helpful to work with AAI.	Sharad Kumar (2018) [19]
18	Airline Operator	Involvement of private sector operators on airport platform help the airlines to focus on core business.	Carlos Oliveira Cruz, et al. (2011) [20]
19	Aviation Industry	PPP of Airport. Generates 2 sources of Revenue i.e. aeronautical and non-aeronautical.	Eduardo Engel, et al. (2018) [21]
20	Aviation Industry	Private sector will be capable of more financing and investing in order to improve the service efficiency.	Tae H. Ouma, et al. (2006) [22]
21	Business Strategy	Applying ABCD Model for a successful Business Model.	Aithal, P. S. (2016) [25]

### 5. GOVERNMENT PROGRAMS TO DEVELOP THE AVIATION INDUSTRY :

The growth of the aviation Industry in India was tremendously in rise both economically and socially. With the increase in the air flyers, the economic growth was also witnessed. Development and investments in the industry was in increase, within these recent years. In 2019, AAI set up plans to start the first three water airports in Andaman & Nicobar. It was additionally observed in 2020, January, just afore the outbreak of COVID-19, IndiGo was promulgated to be the first Indian air carrier to increase the aircraft fleet size of 250 planes, which was venerated to operate 1500 flights per day. With the increase in the aircrafts, Indian Aviation industry had to invest US\$ 150 million [23] for the aircraft maintenance, repair and Overhaul unit to render

quality service to the customers in December 2019. This service was completely exempted from the customs and countervailing duties.

In November 2019 the Competition Commission of India permitted Adani Properties private Limited to acquire the shareholding in Mumbai International Airport Limited. To cater to all these requirements of the Aviation Industry, AAI has a long-term five-year plan, so to expand amenities and infrastructure at the airports, it invested nearly 25,000 crores. To develop Guwahati as an inter-regional hub and Agartala, Imphal and Dibrugarh as intra-regional hubs it also undertook a strategy to accomplish this. The services rendered by the aviation Industry was highly notes. In the year 2020, the air traffics was recorded to be 341.05 million [23] with the compound annual growth rate of 11.13 percent. National passenger circulation also added to this development by having 274.50 million in FY20 with 66.54 million and the compound growth rate of 5.01 percent. The international aircraft movement reached 2,155 thousand in FY20. So, to cater to these developments, there were 103 operational airports in India, which increased 190–200 in FY20. It was observed that It was also observed that air transport sector of India reached US\$ 2.75 billion in the middle of April 2000 and March 2020. The government has permitted 100 percent FDI under the automatic route in planned air transport service, regional air transport facility and national scheduled passenger airline. But the government approval is required for FDI over 49 percent. Aviation Industry of India is likely to witness Rs 35,000 crore (US\$ 4.99 billion) investment in the next four years. The aviation industry in India should witness a Rs 35,000 crores (US\$4.99 billion) investment over the next four years. For the expansion of airport infrastructure along with aviation navigation services, India's Government is also planning to invest US\$ 1.83 billion by 2026.

Accordingly, Indian Government has taken many Initiatives to further develop the aviation industry. Under 'Lifeline Udan' an initiative by India's Government flights was operated for the transportation of essential medical cargo to distant parts of the country to support India's war against COVID-19. As of May 05, 2020, Air India, Alliance Air, IAF including private carriers operated 465 flights. The government also introduced 'Krishi Udan Scheme' both on national and international routes to aid farmers in transporting agricultural product and improving product value. This scheme was introduced in Union Budget 2020–21. Government of India is also promoting aircraft financing and leasing activities under the Union Budget 2019–20 to make Indian aviation market self-reliant. To develop the new greenfield airport in Hirasar, Gujarat, the Government of India In February 2019 sanctioned with an estimated investment of Rs 1,405 crore (US\$ 194.73 million). In January 2019, the Government of India was working on an overarching plan to promote domestic aircraft manufacturing and financing in the country. In January 2019, Government organized the Global Aviation Summit in Mumbai, which witnessed participation of over 1,200 delegates from 83 countries. In January 2019, the Government of India released its 2019 National Air Cargo Policy Overview that envisioned making Indian air cargo and logistics the most efficient, transparent and profitable across the globe by the end of the next decade.

The Regional Connectivity Scheme (RCS) is being rolled out. All these improvements made by the Government brought in lot of economic development. Hence Under the RCS-Udan program, about 34,74,000 passengers were carried and 335 routes were assigned in 2019, covering 33 airports (20 unserved, 3 underserved, 10 water aerodromes). In order to improve the promotion of the environment a great deal of work has been done. As a result, as of October 2019, 55 IAA airports have been reported as single-use plastic-free airport terminals. It was expected that India would have the most aircraft flying on its regular airlines by December 2019.

#### **6. ACHIEVEMENTS AFTER THE INITIATIVES TAKEN BY THE GOVERNMENT :**

With the various initiatives taken by the Government of India, huge promotions in the Aviation Industry was seen. So, the number of passengers flying increased to 34,74,000 in 335 routes, which covered 33 airports. In addition, to be environmentally friendly, close to 55 IAA airports reported single-use non-plastic airport terminals.

#### **7. FUTURE OF THE AVIATION INDUSTRY IN INDIA AFTER PRIVATIZATION :**

In order to avail flight facilities to the majority of the country's population who are unable to get the flight services due to economic constraints, the aviation industry need to tap several resources. This will cater to the

40% development. Industry stakeholders must also be engaged and collaborated with policymakers to implement effective and rational decisions that would stimulate India's civil aviation industry.

Should this strategy be pursued, India would reach the third largest aviation market by 2020. Expenditures by Indian travellers are projected to increase to 9.5 Lakh crore (\$136 billion) by 2021. The growing demand for air travel means that India will need 2,380 new commercial aircraft by 2038. This will promote the economy of the Nation indirectly and also will improve the standard of living of the people. This would position India as the third largest aviation market by 2020. If the economy moves forward and ends the current global pandemic, Indian travellers should grow to Rs. 9.5 lakh. This may necessitate an increase in demand for air transport. This means that India needs about 2,380 new commercial aircraft by 2038 [24].

### 8. ABCD ANALYSIS OF PPP MODEL OF AVIATION IN INDIA:

ABCD analysis is a framework for qualitative and quantitative analysis of systems, concepts, technology, ideas, and strategies developed in the year 2015 [25-29]. This framework suggests identifying advantages (A), benefits (B), constraints (C), and disadvantages (D) of the system. Here, we have identified advantages, benefits, constraints, and disadvantages of PPP model in India [30].

**Table 2:** ABCD analysis based on PPP model

Sl. No	Organization	Customer	Employees	Society	Cargo sector
<b>Advantages</b>	1. Airport expansion 2. Increased infrastructure. 3. More revenue generation. 4. Competent to investment. 5. Increased demand for non-aeronautical service.	1. To provide service with international standards. 2. Faster service to save time. 3. Handling of baggage with due care.	1. Better training. 2. Support of updated technology.	1. Economic development. 2. Increased revenues under the International Service Standard. 3. Community development.	1. Increased cargo business. 2. Main mechanism for procurement. 3. Faster delivery of cargo. 4. Quality storage system for cargo.
<b>Benefits</b>	1. Improved standard of service. 2. Increased passengers. 3. Increased airlines. 4. Target of more destination.	1. Increased customer satisfaction. 2. Increase in number of flyers. 3. Comfortability in airport. 4. Good facilities provided.	1. Better incentive to the best performer. 2. Standard facility is provided. 3. Transportation facilities on free of cost.	1. Increased employment opportunities. 2. Economic development. 3. More educational institutions. 4. More CSR activities. 5. Flow in a greater number of tourists.	1. More revenue. 2. Economic growth.
<b>Constraints</b>	1. Unsafe airports. 2. Financial constraints. 3. Lack of public support. 4. Difficulty in land acquisition	1. Rigid policies. 2. Security threat. 3. expensive service. 4. High charge for parking,	1. High work Load. 2. Target. 3. Low pay. 4. High stress.	1. More tourist. 2. Limitation of entry to the terminal building. 3. Increased cost of advertisement	1. Increased policies. 2. High charge for storage and handling of cargo. 3. Too much of restrictions on cargo.

	for expansion of the airport. 5. Government Policies.	facilities and other utility services. 5. Fines to the customer.		& rents of shops. 4. Gap between the public and company.	
<b>Disadvantages</b>	1. Increase in unsafe flying. 2. Decrease in development of the airport. 3. Lack of public support 4. Political interference. 5. Too much government interference. 6. Rotation of employees. 7. Lack of previous experience in handling airports.	1. Aggression behavior of employees. 2. Too expensive service. 3. Not reachable to the economically poor people. 4. Strict custom policies.	1. Work pressure. 2. Less human resource. 3. Stringent policies.	1. Western influence on the culture. 2. Conflict of interest between public and organization.	1. Increased air traffic. 2. Too much congestion in cargo airport. 3. Security threat.

## 9. CONCLUSION :

(1) There are currently 91 international carriers in India, including 5 Indian carriers and 86 foreign carriers, reflecting the development of the aviation industry in India. With this connection with major countries of the world, the revenue passenger Kilometer in domestic airline demand growth in 2018 was 18.6% [31] which is three times the global RPK growth of 6.5%.

(2) IAA has 125 airports and runways out of a total of 464, and manages about 78% of domestic passenger traffic and 22% of international passenger traffic. The cargo traffic share in promoting economy was higher as 68.5% [32] in International cargo and 31.5% in domestic cargo traffic. Together with this the maintenance, repair is expected to grow annually.

(3) Major achievement like the IGI airport in Delhi enhances safety and efficient in air transport management service due to the advanced and highest air traffic control tower. Hence Indian aviation sector is the highest contributor to Indian economy being the contribution of GDP of \$72 [33].

(4) It contributes to the economy indirectly by promoting globalization, where the fliers increased to 79 million in 2010 to 158 million in 2017. This may increase in the coming years. It also supports 7.5 million employment and 6.2 million in tourism. The cargo market also shows largest in UAE. Where, Delhi and Mumbai contribute highest to cargo market. Government is also aware that the privatization will make the modification on structural change in service provided by the airport and economically viable and sound [34].

(5) As it was noted that the customers always demand greater service from the airport and airlines after spending money [35]. So, PP model is one of the best models to meet the needs of the customer in systematic way. There are lot of challenges for the aviation industry. Presently the pandemic faced globally will have a fall on the rise of the aviation industry. With the world bank support the aviation should bring strategies to sustain its growth. However, the competitiveness of the Travel and Tourism may pressurize the tourism infrastructure to bring in more strategy for improvement.

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