

# INDIAN CIVIL AVIATION: A REVOLUTION IN THE MAKING

RAJESH CHIDAMBARAM

We are on the threshold of a revolution as far as civil aviation in our country is concerned. It is common knowledge that the number of rail passengers per day is more than the number of air passengers in a whole year in our country. Today, the number of air travellers has jumped exponentially with the proliferation of domestic airlines, and additional flights launched by foreign airlines are set to saturate Indian skies. It happened in China, and it is now the turn of India to face a major revolution in the skies.

After many false starts and half measures, the Indian civil aviation scene has finally started opening up. The present Civil Aviation Minister, Mr. Praful Patel has aptly summed up the impact of aviation on all other sectors,<sup>1</sup> "Aviation is a true integrator of the economy, bringing high investments and facilitating trade as well as tourism. Growth in aviation could also create jobs for millions of young men and women, especially as it is a service industry involving deployment of vast human resources. The civil aviation sector can clock 25 per cent compounded growth in the next ten years. Our estimate is that the sector would need investment to the tune of Rs.1,50,000 crore spread over ten years."

What are the challenges that are ahead to meet the situation and what are the opportunities these situations offer?

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Rajesh Chidambaram, former Group Captain, Indian Air Force, is a senior airline pilot.

1. *The Economic Times*, December 23, 2005.

### **CIVIL AVIATION SECTOR: AN OVERVIEW**

The Indian aviation sector can be broadly divided into the following four main categories:

1. Domestic airlines, which provide scheduled flights within India and to select international destinations.
2. International airlines, which operate scheduled international air services to and from India.
3. Non-scheduled operators, which include charter operators and air taxi operators.
4. Air cargo services, which include air transportation of cargo and mail.

Indian carriers will press into service a new aircraft in every week of 2006. All told, they are expected to buy or take on lease 60 new aircraft during the year, increasing their fleet size by over a third, from 175 now to 235 a year from now.

Passengers may groan at the prospect of more delayed landings and takeoffs on account of airport congestion. But entrepreneurial enthusiasm is undimmed. In a second year of frenetic action, half a dozen new carriers are slated to start operations in 2006, and at least four airlines are expected to float initial public offerings (IPOs).

Jet Airways set the ball rolling by raising Rs 1,200 crore from the market in February 2005. Air Deccan, SpiceJet and Paramount raised funds worth \$150 million from private equity firms in 2005. Next year, apart from the state-owned Air-India and Indian Airlines, Air Deccan and Kingfisher Airlines are expected to hit the market with IPOs.

Among the new low-cost carriers waiting to take wing in 2006 are IndiGO, Magic Air, East West, Indus, Premier and Star Air. They will want to imitate predecessors like Air Deccan, which, in 24 months has acquired 24 planes. "Next year, the new carriers will have a combined fleet size of about 95 aircraft, up from 40-45 now. They will then be able to compete well with the likes of Jet Airways and Indian Airlines," says Kapil Kaul, chief executive, Centre for Asia Pacific Aviation (CAPA).

Indian carriers grabbed world attention in 2005 when they placed large orders for new aircraft. Out of the total of 280 aircraft signed up by Airbus at the Paris Air Show, 135 were from Indian carriers. A good number of these planes will be delivered in 2006. Flyers will, therefore, get more choice and perhaps even sweeter fare deals. The flip side will certainly be more congestion at the airports and longer delays. The government's action plan for the year includes opening a new runway each at Delhi and Mumbai airports, during the first quarter of 2006, but terminal capacity and even car parking remain serious constraints.<sup>2</sup>

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## CHALLENGES

1. **Airport Infrastructure.** In spite of seeing the writing on the wall, this has been in a "Rip Van Winkle" type of situation. That a problem of over-congested airports has come up is something that should have been anticipated and catered for. However, it is still not a hopeless situation, and there is a way out. Since older airports cannot be closed down, domestic air traffic could be restricted to these airports while newer, world-class airports can be built to exclusively handle international traffic. The need for parallel runways and quicker recovery of aircraft is another consideration. Traffic congestion has become an endemic problem and the money for the amount of fuel that airlines burn to cater for these delays, if used, could actually have constructed more airports. But constructing runways and taxi tracks is not enough. The recent runway overrun by an Air Sahara B737 and the subsequent paralysis of our country's busiest airport for nearly four days underscores the requirement of better crash and retrieval facilities.

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2. Bipin Chandran & Pr Sanjai, "Flying High," [www.businessstandard.com](http://www.businessstandard.com), December 27, 2005.

2. **Air Space Management.** A lot of military flying space is virtually out of bounds to civil traffic. In this day and age of satellite imagery, Google Earth, etc., keeping defence air space and airfields out of bounds is not a very realistic approach. A beginning has been made with the setting up of the joint air traffic control (ATC) air space management groups, but more synergy and understanding is required. While the Indian Air Force (IAF) ATCs have been posted to international airports, the mutual professional suspicion/jealousy still exists. Certain aerial corridors and height bands can still be released to civil traffic because it is not very often that levels above 30,000 feet in defence air space are utilised by fighter traffic. Systems followed in heavily congested European air space could be adapted by us.
3. **Rapid Transit System From Airports.** Building airports is not enough and there is a need to have rapid transport transit systems which move the population that arrives, and decongest the airport before the airport is ready to receive the next lot of passengers. Traffic jams from the airports into the city downtown area at specific times of day and night underline the need to develop these facilities in parallel with the developments of airports. These would encompass rail, road, and heliport systems. Examples like the private initiative in Bangalore to build a direct flyover to the electronic city are steps in the right direction.
4. **Human Resource (HR) Problems.** While it is all very simple to assume that disposable incomes with the middle class have increased and so there is a necessity for more aeroplanes, the associated HR problems cannot be glossed over. To position more people for all aviation related jobs in operations (captain/co-pilot/dispatcher), engineering (AME/ technicians), commercial staff (sales/ ticketing/airport trim staff), cabin crew, etc., specialised training is required. Most jobs, except those of the flight deck and engineering, do not require much lead time. However, these cannot be created

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overnight and the recent exodus of trained manpower to various startup airlines is an indicator of poor HR policies followed by some airlines. CAPA has estimated there could be a shortfall of 94,200 airline staff by 2010 if training systems, salary conditions and attrition rates remain as they are now. CAPA estimates that 10,000 extra pilots will be needed by 2010 and, additionally, further specialist employment roles will include 12,000 extra ticket sales employees, 21,000 cabin attendants and 15,700 technicians. In addition, large numbers of less skilled employees such as drivers, baggage handling attendants and cleaners will be required<sup>3</sup>.

5. **Pilot Training.** "If the pilots don't exist, you can buy all the planes you like but you can't put them in the air."<sup>4</sup> Training of pilots takes the longest gestation period as far as civil aviation is concerned. With lead times of up to two years to train an individual to fly large, multi-engine jet aircraft, the urgency of pilot training is readily apparent. And it is this need for extra pilots that is producing the most immediate HR challenge at the moment.<sup>5</sup> It's all very well to plan a budget airline on the assumption that you will be able to get more and more low cost air crew. But, if the market continually bids up the price of the air crew, the plan could run into trouble. As they say in real estate – location, location, location – the only answer to pilot shortage is training, training and more training. Not only does this involve training *ab-initios* as co-pilots and co-pilots as commanders, but also involves an important aspect of training of trainers.

To meet the sudden demand which is estimated at approximately 1,000 pilots per year, the number of trainers required would also multiply. Once more trainers get qualified, it would help in getting more pilots online and upgraded, as required. However, this requires good planning, foresight and, above all, a will to execute. Since there are monetary considerations involved at all stages, there is generally reluctance to upgrade and increase the number of trainers. This, to say the least, is extremely shortsighted. The government has taken a few policy initiatives in this regard – they have reduced the

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3. David Mason Jones, "Please Fasten Your Seat Belts, *Singapore HRM*, Issue 5.7, pp.13-14.

4. Jones, *Ibid.*, pp.13-14.

5. Jones, *Ibid.*, pp.13-14.

number of flying hours from 250 hours to 200 hours for issue of commercial pilot's licence (CPL) and, on the other hand, they have increased the retirement age to 65 years in respect of all commercial pilots. This, it is hoped would serve as a stopgap measure until such time the shortage of pilots is reasonably sorted out. Presently, there are few active flying clubs in our country. Most of the state government-run flying clubs are either defunct or extremely inefficient in their functioning. There are only a few private flying clubs that are actually delivering the goods. The result of all this is that our CPL aspirants are going to foreign countries such as Australia, the US and Canada to pursue their licence within the specified time period.

The defence Services retire a number of qualified flying instructors (QFI) every year. They cannot be utilised in civil training as their qualification does not have an instant conversion in the civil field. This may require a change in the aircraft rules so that the Service qualification is recognised in the civil sector,

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and these QFIs could help train pilots required for the civil airlines. A number of abandoned airfields are available throughout the country which are either on defence/state government land. With the required initiative from both the central and state governments, a few of these abandoned airfields could be leased on a BOOT concept. The Directorate of Resettlement could step in and funds from the benevolent associations could be invested as a business venture into

these projects. Subsidies could be sought from the government to ensure the viability of such projects. Not only would they contribute to pilot training, but would also boost the economy and provide employment to people located close to these areas. Similar concessions as given to industries established in backward areas could be thought of so that these areas could be better developed. Defence establishments set up in various rural and remote areas have, over the years, contributed very largely in developing local economies.

Based on this concept, these abandoned airfields would serve as pockets of development in our rural areas.

The present shortfall is being made up by recruitment of expatriate pilots from the Americas, Europe and Southeast Asia, who are presently employed by our carriers on excellent terms and conditions. This needs to be

viewed only as a short-term solution, and the sooner more pilots are trained by the airlines, the better it would be for their profit margins. The world over, we have seen a fast turnover of trained manpower from low-cost carriers to the more traditional ones. Because of this, low-cost carriers need to constantly upgrade and review their salary packages to prevent hemorrhaging of trained air crew.

6. **Emergence of Low Cost Carriers (LCCs).** What happened to the telecom sector is now happening in aviation. Ultimately, it is the consumer who benefits and that is amply evident with the changing demographic profile of the air traveller. The LCCs have shown to the Indian public that, at last, aviation is merely an infrastructural tool and a method of communicating between cities, and should be used that way. However, there are a few words of caution. Aviation is a highly capital intensive business and break-evens take a few years time. Presently, load factors of LCCs have been good during the holiday period; but whether these load factors will sustain during lean periods, only time will tell. Also, there is a need for the travelling public to understand the nuances of a low cost carrier. These are presently not very clear to those who travel by LCCs and frequent cases of *dharnas*, etc. are heard of as the news of cancellations/delays are announced. Unlike in the road transport system, where India moved from *junta* buses to deluxe and luxury coaches, in aviation we have started the other way round. Therefore, in cases of flight delays or cancellations, the public demands compensations such as are given by full cost carriers like transfer to another airline, meals, hotel

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accommodation, etc. If these requirements are to be met, the entire bottom line of LCC profits would be wiped out.

7. **Intra-Airline Movement of Trained Personnel.** Presently, the heat of airline movements is being felt by all airlines. There is no rule that prevents anybody from changing jobs and a poaching policy cannot be devised which is fool-proof. The director general civil aviation (DGCA) has brought out a circular making a six-month notice rule mandatory in case of change from one airline to another. However, this is unlikely to stand legal scrutiny if put up to the court. While it is understood that movement of trained manpower has the potential of grounding an airline or its fleet, attendant losses make this a very risk prone area.
8. **Cost of Aviation Turbine Fuel (ATF).** ATF is ridiculously overpriced in our country. Once we remove the premium tag of aviation, and see it as an infrastructural tool rather than a revenue generating source, the entire issue of pricing would be seen in the right perspective. States charge an exorbitant sales and excise tax on ATF without considering economies of scale. An example is the state of Goa which charges the least amount of tax on ATF and has a booming tourist industry dependent on arrivals by air from both domestic and international destinations. Since aviation aids tourism, reducing sales tax on ATF would go a long way in providing an impetus to the tourism industry. Hedging of ATF costs is already under consideration by the

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government. A case study of the success of South West Airlines achieved by hedging fuel costs would only go to strengthen the need of this concept.

9. **Airport Location.** Other than metros and certain important cities, airports in our country have unfortunately been developed on the constituency concept. Each political leader always got an airport built in his constituency which ultimately ended up serving his own selfish interest in that he could travel there in a light aircraft but did



nothing to boost the revenue of his constituency. A few examples need mention here. Development of Hasan airport in Karnataka was initiated when Mr Deva Gowda was prime minister: of what use it is today, is anybody's guess. On the other hand, Surat, which is a diamond polishing hub, has been bidding for an airport for quite some time now. Unfortunately, this opportunity, has been denied to it and the small airport available there is not of much use. Similarly, Amritsar connects Birmingham, Toronto and Singapore but has very poor domestic connections. On the bright side, Kochi international airport, which was built with a certain degree of private participation, in spite of poor government policymaking like mandatory ground handling by Air India staff, has been able to make a profit, which is an indication of the shape of things to come. There is a need to study all these aspects and relook at our requirements for airports in certain places.

The hurry to declare airports "international" is yet another political gimmick. How far the gullible public is impressed by having an international airport in their midst is a moot point. The recent declaration of Pune airport as an international airport is a case in point. The already overcrowded and extremely small terminal has now been further segregated to cater for customs and immigration, making the entire area resemble a fish market. Till such time the infrastructure can cope up, there is no point declaring airports "international".

## **OPPORTUNITIES**

Certainly, on the confidence side of the equation, the airlines are showing every sign that they believe the next few years will be a time of unparalleled expansion. Passenger numbers are growing and the underlying cause for that – increased personal wealth across broad sections of the community – is likely to continue.

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This confidence has led to the placement of a lot of firm orders for delivery of new aircraft in our country in the next five years. On the caution side of the equation, it may not be as simple as just filling up the passenger seats. Massive infrastructure and support requirements must be met before the predicted upward line on the graph sheet becomes a reality.<sup>6</sup>

All that having been said, there is a need to find some solution to the problems that have been envisaged. The challenges to civil aviation also give us more opportunities for the future. It is essential that these opportunities be exploited in the short timeframe that is available.

1. **Development of Hubs Based on the US Example.** In the USA, cities grew around aviation hubs giving ample room to the aviation service provider. For example, American Airlines developed areas around Dallas Fortworth, Continental helped develop Houston, North West developed Minneapolis, etc. Considering the geographical extent of our country, there is no point

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increasing the players into Delhi/Mumbai. All that is achieved is overcrowding and delays and contributes greatly to an already overstressed infrastructure. There is a need to identify certain places, state and region-wise, which need to be developed as hubs keeping in view projected growth over the next few years. For example, Kochi could be further developed in Kerala, Coimbatore in

Tamil Nadu, Pune in Maharashtra, etc. There is a need to identify some focal points for cargo operations like Nagpur which could serve as a nodal point.

Today, one identifies Air Deccan and Kingfisher with Bangalore in spite of their national presence. Similarly, Air Sahara has gone about building a hub at Hyderabad. Spice Jet operates most of its flights through Ahmedabad. This activity not only helps build load factors for the airlines, but also develops brand loyalty from the customers. More and more players could be accommodated in various hubs, thus, not allowing a monopoly and giving

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6. Jones, *Ibid.*, p.13.

the customer more bang for his buck. Just like routing to various areas in the country falls under certain categories, there is a need to identify and allow certain code sharing so as to not waste resources unnecessarily. A case in point is the recent understanding between Kingfisher Airlines and Indian Airlines to share certain seats in certain sectors in the northeast.

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2. **Creation of Jobs.** This sector throws up job opportunities galore. Other than aviation related opportunities, there are also other job opportunities in the related hospitality and service sectors. These could also be in the form of such obscure and unthought of areas like setting up of petrol pumps and fast food joints along the highways connecting the airports with the cities.
3. **Airports and Allied Charges.** The Naresh Chandra Committee report has gone into various concepts for airport development. They have also suggested review of green field projects as new green field airports were not permitted within 150 km of an existing airport. Political considerations need to be put aside so that the pace of development is not sacrificed. The way the Bangalore airport project has (not!) developed over the years is a shining example of bureaucratic and other delays. Even the projected demand for passengers at Bangalore airport has been reviewed upwards recently. The Gujarat government has taken a step in the right direction by already initiating a study into the need for another airport at Ahmedabad, based on future traffic projections. The slow progress over the proposed modernisation of Delhi and Mumbai airports is another indicator of things not exactly going right. The recent move by Kochi airport to go public with an IPO shows what a private airport is capable of doing.
4. **Economics of Airport Locations.** There is a need to create cheaper domestic airports and to review our airport and allied charges since they are based on the public sector monopoly concept rather than economies of scale.

Navigation and landing charges need to be reviewed and certain incentives need to be provided to serve as an impetus to growth.

For example, to decongest Delhi, the Airport Authority of India (AAI) could tie up with the IAF to use their airfield at Hindon for certain carriers

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wherein this would serve as an incentive for lower cost. As a pilot project, a few LCCs could be allowed access with a cheaper landing/parking structure and a totally separate civil terminal. These charges could in turn create individual profit centres, making defence assets pay for themselves. The ATCs could be manned by retired IAF personnel during hours of civil operation. A study of the same on a trial basis is

worthwhile to derive the benefits of a number of defence bases which could be used for civilian traffic once the peak activity of military flying is complete, especially during afternoons and on Saturdays/Sundays.

A study of the emergence of the Kuala Lumpur international airport (KLIA) would show us how advanced planning helps create the required infrastructure with future projections in mind. When the KLIA was coming up at Sepang, despite a slightly muffled Press, there was some degree of scepticism about whether the airport which was 90 km away, would be able to respond to consumer requirements. Today, KLIA ranks among one of the top airports of the world and parts of the highway to the airport have been developed into a Formula 1 race track, thereby, getting in more revenue. Places such as London have four airfields (Heathrow, Gatwick, Stanstead, Luton) at various distances from central London. Despite that, these airfields are still called London airport and have good connectivity among themselves.

5. **Manpower Requirements.** Other than shortages in airline operations, there is also a need to check manpower requirements in ATC and other services. A system of lateral absorption of air traffic controllers/fighter controllers of the

IAF needs to be considered on priority. Exams associated with this should be organised by the DG Resettlement so that lateral flow of trained and disciplined manpower would also prove to be an asset. This would also help induct personnel with a 'managerial' mindset rather than a 'trade union' mindset: a malaise that the entire civil aviation industry suffers from. While in the recent past, shortages of all types of trained manpower have given rise to some sort of grievance redressal, an ideal mix would be a blend between 'trade unionism' and the 'managerial' approach. How one is able to achieve this and the dynamics involved is a matter of debate.

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In spite of all the hoop-la about civil aviation and the constant clash between defence and civil aviation, there is a need to mutually assess the shortage of human resources and the demand of the civil industry. In a lot of areas, the three defence Services can meet this demand; however, there is a need to reorientate and retrain to the requirements of civil aviation. Presently, there is a lack of synergy between both the civil and defence systems. Also the IAF and Indian Navy (IN) can tie up with a few airlines for ease of lateral absorption of their manpower which would help both the Services and the civil airlines.

6. **A Need to Develop Separate Terminals for LCCs.** LCCs do not provide the same type of service provided by full service airlines – and it is because of this that the requirements of their terminals need a little more understanding. For example, there is a necessity to have a full-fledged food court with reasonably priced food items so that the passengers may avail of this facility. A sort of tie up between the LCC and the food court caterer could also give a better financial deal to the passenger. Presently, small cafeterias in our airports are exorbitantly priced and chains like Amul, MTR, etc. could help bring down

the cost of food items which need to be available to the travelling public. This would also be very useful in case of delays. Check-in counters at terminals could be rotated between various LCCs at various times of the day so that they are better utilised. The recent chaotic scenes during the fog at Delhi underscore the need to establish the terminals with enough numbers of food courts on priority.

7. **Maintenance (MRO) Facilities.** With the recent signing up of aircraft orders at both the Paris and Dubai air shows, there is a need to bid for better maintenance facilities for both the Airbus and Boeing class of aircraft. Air India and a few private airlines have tied up with both Airbus and Boeing to set up maintenance and overhaul facilities in our country. Even countries like Indonesia provide adequate MRO facilities and a number of our Boeing aircraft go there for major checks. Spare capacity at the various divisions of Hindustan Aeronautics Ltd (HAL) could be utilised for checks on various aircraft. This would help utilise our experience in aircraft manufacture and help reduce outflow of valuable foreign exchange.
8. **Simulator Facilities.** The need to develop training institutes for pilots and engineers for both Airbus and Boeing locally is essential so that a lot of time wasted in movement of crew up and down is avoided. The government needs to provide the right investment atmosphere for large simulator and training facility majors like CAE, GECAS, etc. so that they could develop their centres here. This could cater for the entire South Asian region. With this, the attendant infrastructural benefits for the service industry like hotels and transport would only have a multiplier effect on our economy.
9. **Tourism.** Domestic tourism has shown a remarkable increase in the past few years. Aviation has provided the correct impetus to this. We need to develop areas of tourist potential and link them with airports. Our coastline is an ideal case of neglect. The beaches could provide much more tourist potential than what we derive from them.
10. **Manufacturing Facilities for Ground Equipment.** Presently, there are very few players in the market that manufacture ground equipment necessary for airline operations. With projected growth figures, the requirement of

associated ground equipment multiplies exponentially. Not only would the present manufacturers benefit, but a number of new players would also come up.

11. **Need to Manufacture Specialised Oils and Lubricants Domestically.** Both the defence and civil aviation sectors could now tie up for local manufacture of oils and lubricants. With large volumes involved, principal manufacturers abroad would be interested in setting up joint ventures to produce and market these products in our country at a lower cost.

## CONCLUSION

The year 2006 will be a make or break year for airlines with big expansion plans in the Asian region, CAPA has said in its annual outlook report. With an unprecedented number of aircraft ordered by Asian airlines for delivery in 2007, the Sydney-based industry research group said that 2006 represented the “quiet before the storm.” As we enter 2006, there is a higher than usual level of unpredictability.<sup>7</sup>

Aviation is expected to grow at a rate of between 15 and 25 per cent annually. The progress of aviation in China over the past few years shows us exactly where we are also heading and it needs to be emulated. The ratio of aircraft to our population is extremely low and considering the annual growth in our gross domestic product (GDP), we have the capability of absorbing many more aircraft. That this growth needs to be correctly channelised and assisted goes without saying. On the flip side, any laxity in this would only hinder progress and scuttle economic growth. Therefore, the role of the government should be that of a facilitator rather than a hindrance. One does not need to repeat the mistakes of the past wherein a number of domestic airlines sprang up and disappeared overnight.

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7. AFP correspondent, “Asian Airlines to hit Turbulence in 2006: CAPA,” [www.biz.yahoo.com](http://www.biz.yahoo.com), December 29, 2005.

A comparison between telecom and aviation is relevant. Telecom has shown a near 1,600 per cent growth over the past few years. Unhindered by barriers on the ground and using only the medium of space, telecom has drastically changed the way the average Indian works and thinks. Today, a number of multinational corporations (MNCs) are manufacturing cell phones and the prices of these instruments are constantly dropping. Trunk call costs and mobile telephony costs have drastically dropped over the past few years. Come January 2006, STD rates are expected

to go down further, bringing the entire country under one standard rate. This is exactly what the future holds for us in aviation. The customer is set to benefit and finally realise the Mahatma's dream of the consumer being king.

Whatever eventually becomes the reality in the airline industry in the next five years, it is certain that it will be a time of pressure on the HR departments of all airlines. There will be turbulence in which the main airlines will hold their positions while some discounters will grow, and some discounters will cease. Those companies that already have substantial HR infrastructure are likely to handle the growing market best. Sadly, those who are scratching to find low-cost pilots and skilled workers are likely to be still scratching in five years time.<sup>8</sup>

Air Deccan has recently adopted R.K. Lakshman's common man as the mascot for their airline. This in a way sums up the entire objective of aviation: to be an infrastructural tool and contribute towards economic progress and development.

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8. Jones, n.3, p.20.