



DEPARTMENT FOR PROMOTION OF
INDUSTRY AND INTERNAL TRADE
MINISTRY OF COMMERCE & INDUSTRY
GOVERNMENT OF INDIA



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AIRPORTS AUTHORITY OF INDIA



Government of Telangana



MINISTRY OF CIVIL AVIATION
GOVERNMENT OF INDIA



24th - 27th March 2022
Begumpet Airport, Hyderabad, India

INDIA@75: NEW HORIZON FOR
AVIATION INDUSTRY

GLOBAL AVIATION SUMMIT

POST-SHOW REPORT





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Key Highlights

Wings India 2022, Asia's largest event on civil aviation (Commercial, General and Business) jointly organised by **Ministry of Civil Aviation, Airports Authority of India and Federation of Indian Chambers of Commerce and Industry**. The event took off from **24th - 27th March 2022** at **Begumpet Airport, Hyderabad, India** with all four days witnessing eventful of activities.





The presence of **125** exhibitors got a footfall of approx. **3,253** Business Visitors and **52,345** General Visitors who made the Wings India 2022 exhibition a Great Success.



First two days of the Global Aviation Summit were marked with various panel discussions and round tables in the presence of senior officials of Government of India (GoI), key policymakers, global experts, corporate leaders, and other stakeholders.

Highlights of the show are as follows:

Roundtables & Panel Discussions - **14**

Speakers - **76**

Delegates - **825**

Foreign Delegations **22**

B2B Meetings - **364**

States & UTs - **28**



The showstopper of the event, **Sarang** helicopter aerobatics team of Indian Air Force (IAF) performed all four days, the last two days were open for public.



AIRBUS A350, EMBRAER 195 E2, NAL - HANSA – 3, HANSA-3 / NG, JetSetGo Aviation Services Pvt Ltd - Legacy 600 & Hawker 800 XP, Blue Ray Aviation Private Limited - Cessna 182, Kasstech Aerospace - DA42, HAL- DO228, were a total of 12 world's best metal birds at the display.



Wings India 2022 was fully open for public who visited the exhibition to catch the close sight of aircraft of display and air show by Team Sarang.



Block your diary for next Wing India show which will be held at Begumpet Airport, Hyderabad, India, from **18th – 21st January 2024**.

MEDIA COVERAGE

220 విమానాశ్రయాలను ఏర్పాటు చేస్తాం

- కరోనా తర్వాత విమానాశ్రయాలను రింగ్ రివైవ్ చేయాలి
- విమానాశ్రయాలలో టెక్నాలజీని ఉపయోగించాలి
- కేంద్ర మంత్రి జ్యోతిరావ్ సీంథియా
- ఎయిర్పోర్ట్ టూర్గా విమానాశ్రయాలను మెరుగు చేయాలి



Air passenger traffic to surpass 410 m by 2024-25: Scindia

Domestic passenger traffic per day is 3.81 lakh now against 4.41 lakh pre-Covid

OUR BUREAU

Hyderabad, March 23

The number of air passengers in the country will surpass 410 million per annum by 2024-25 given the post-Covid V-shaped recovery and the thrust being given by the government to civil aviation sector, Jyotiraditya Scindia, Union Minister for Civil Aviation, said.

Speaking at the inaugural ceremony of Wings India 2022, Asia's largest civil aviation conference here on Friday, Scindia said, "Despite challenges,



Jyotiraditya Scindia, Minister of Civil Aviation, and French Minister of Transport Jean-Baptiste Djebbari, at the inauguration of Wings India 2022 in Hyderabad on Friday.

by the Covid-19 pandemic, the sector recovery is witnessing a V-shaped recovery.

He said, "The recovery in the sector is witnessing a V-shaped recovery. The number of air passengers in the country will surpass 410 million per annum by 2024-25 given the post-Covid V-shaped recovery and the thrust being given by the government to civil aviation sector, Jyotiraditya Scindia, Union Minister for Civil Aviation, said.

tional travel will be 100 per cent opened up in two days from now (on March 27). We should be able to surpass 410 million in the total number of domestic and international travel passengers by 2024-25," the minister said.

Airports expansion

Stating that India was looking at 'tremendous' expansion, the Scindia said the total number of airports (including helipads and waterdroms) were being increased. "By 2024-25, their total number will go up from 140 to 220," he added.

With an addition of 100-120 new aircraft every year, the number of aircraft in the country has been increasing. At present, India has 310

aircraft. The airline operators should also increase the number of wide-body aircraft in view of the expansion of the sector, Scindia said.

Sanjeev Kumar, Chairman, Airports Authority of India, said the domestic civil aviation sector has reached pre-Covid-19 levels. "With the opening up of international travel from March 27, we will have a double digit growth in the sector and also make the loss of last two years," he said.

Rajiv Bansal, Secretary, Civil Aviation, said the UDAN scheme had grown well in the last six years and would also be expanded to tier-3 and tier-4 cities. The capacity of airports, including majors ones such as Delhi and Hyderabad, was being expanded, Bansal added.



Airshow mesmerises enthusiasts

SRUTHI KURUGANTI
HYDERABAD

The Begumpet Airport was bustling with visitors at the ongoing Wings India 2022 on Saturday. From delegates to high-fliers to selfie-crazy to knowledge enthusiasts, hundreds of people came from across the city to witness Asia's largest Civil Aviation Exhibition.

The event is organised by the Ministry of Civil Aviation of India and the Federation of Indian Chambers of Commerce and Industry (FICCI) jointly, with the theme of the event this year being 'India@75: New Horizon for Aviation Industry'. Visitors were enthralled by the spectacular air show put up by the Sarang team. Many first-time visitors and kids enjoyed the aerobatics.

"This is the first time I'm coming here. We even saw the model flights on display. This live experience of the air show they put on with three choppers was majestic. My kids and me thoroughly enjoyed it and would love to come back," said J Chamundeshwari, a visitor.

Visitors felt that the show was not only entertaining but also very informative. Jashua, a student from Hindustan University, Chennai, said that the exhibition made him understand planes in a better sense.

"Aviation is not our territory, but we (humans) are invading it, so we must be cautious and learn everything about it. By coming here, we can see and understand how the industry is working," he says. "We are here to experience the wonders of flights and flying, looking at it just makes you happy," he adds. The crowds were drawn to the exhibit



From delegates to students, people throng to witness the aviation exhibition.



area, which had both private and government aviation stalls. "The exhibitions help in good interactions with people involved in aviation. I aspire to be a pilot but can't afford it. I didn't know there was an organisation like the Indian Women Pilot Association to help people like me. I just now enrolled in and I'm looking forward to pursuing a career in aviation," said T Vaishnavi, a student and aviation enthusiast.

There were also food and memorabilia stalls. At the memorabilia stall, which was the most crowded, people lined up to buy t-shirts, badges, tiny helicopters and masks. Toy planes and t-shirts were in high demand.

The four-day event is open to the public on Sunday too. Tickets are available online on BookMyShow and physically at the Begumpet Airport.

1 Sarang Helicopter aerobatic team passes above an Embraer aircraft on the 2nd day of Wings India-2022 2 The helicopter to be used by Chief Minister K Chandrababhan Rao on display 3 Different types of drones on display 4 Union Minister Jyotiraditya Scindia and Governor Tamilisai Soundararajan use a golf cart to reach the airfield during the Wings India-2022 in Hyderabad on Friday | RVK RAO

Wings India-2022 leaves all visitors yearning for more



నింగి నేలను తాకే సంబరం.. ఆసియా దేశపు అతిపెద్ద ఏవియేషన్ షో వింగ్స్ ఇండియా నగరంలో కొలుపుదీరనుంది. బేగంపేట ఎయిర్పోర్ట్ ఆవరణలో ఈ నెల 24 నుంచి 4 రోజులు పొడుపు కొనసాగనుంది.

Roundtable on Helicopter Industry

A Round Table on 'Helicopter Industry' discussed the growth story of Indian Helicopter industry (India@75), the issues, challenges, and brainstorming solutions for the way ahead. Helicopter Emergency Medical Service (HEMS) and Urban Air Mobility emerged to be the use cases that are going to drive the future of helicopter sector in India as per the panel.



Chaired by

Smt. Usha Padhee

Joint Secretary, Ministry of Civil Aviation,
Government of India

Panelists

- ✈ **Smt Usha Padhee**, Joint Secretary, Ministry of Civil Aviation, GoI
- ✈ **Shri Sunny Guglani**, Co-Chair, FICCI General Aviation Taskforce & Head of Airbus Helicopters, India & South Asia
- ✈ **Shri Sanjeev Razdan**, Chairman & Managing Director, Pawan Hans
- ✈ **Shri Harsh Vardhan Sharma**, Director, Himalayan Heli
- ✈ **Shri Shriram Ghatpande**, Director Business Development, Bell Helicopters India
- ✈ **Shri Mangesh Karyakarte**, Chief Sales Officer, Air Works



Mr Sunny Guglani, Co-Chair, FICCI General Aviation Taskforce & Head of Airbus Helicopters, India & South Asia discussed about extending the affordable tourist routes, looking beyond the off shore segment and heli-pilgrimage segment and HEMS. Informing the roundtable panel about the return of commercial flights to pre-covid levels, Mr Guglani called for a 'Vision 1000 Helicopters' in India. Emergency rescue, Aerial work, Disaster response, and Airborne law enforcement were a few use cases that the panel discussed as critical for viewing Helicopters as a nation building tool, he added. Further, he pointed out that Helicopter industry should be recognised for its social service, hence it is high time that Government should step in from the point of view of funding.

Mr Harsh Vardhan Sharma, Director, Himalayan Heli stated that Helicopter industry is segmented three categories: Passenger, offshore and aerial. Out of all three, passengers and offshore have seen remarkable growth while there is also potential of phenomenal growth in aerial work, he added.

Royalty is being levied by state governments on charter business, making charter packages unaffordable, said Mr Vardhan highlighting one of the challenges.



Mr Shriram Ghatpande, Director Business Development, Bell Helicopters India, in his presentation showcased Bell's abilities as an OEM and all the innovations in progress made so far keeping in line with urban air mobility. He also discussed about technology driven innovations by Bell - Drones, Bell Nexus (as shown below).

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APT**
Enabling
On-demand Delivery



**BELL
Nexus**
Next Generation
Turboprop



He further spoke about Airborne Law Enforcement which according to him is the next big future opportunity for the helicopter Industry. As per Mr. Ghatpande, Single Engine IFR operations are safe and most cost effective, especially in HEMS missions. This has been substantiated by Global HEMS operators. Single Engine IFR Helicopters will help in enhancing the rural to urban connectivity by operating from rural areas to IFR equipped Airports/ Heliports in Metro Cities, he added.



Mr Mangesh Karyakarte, Chief Sales Officer, Air Works highlighted why on Base Approval / Extn. of Capabilities fee may be waived off for RW MRO for 5 years/ until sector recovers. He also asked the government to consider removing restrictions to import Older helicopters (>20years); instead limit its use for HEMS, Pilgrimage, roadside evacuation etc. only. OJT requirements on similar helicopter type must also be waived off for Engineers to allow more MRO to participate in the business and to mitigate the monopoly in the industry, he added. Mr Karyakarte, suggested his member panelists to bring IRDA onboard to formulate the Regulation for the Insurance Companies to cater the HEMS/AMT

services under the Insurance Policy, which can be clubbed with Expressway toll Charges. He further recommended Grading System for MROs should be initiated by MoCA on the annual Audit to improve the Quality of Services by MROs. Government Tenders to explore incorporating Reserve Pricing system based on the Industry Rate for Maintenance Tender; L1 shall be determined over and above the reserve pricing which shall help the industry to sustain and grow, Mr Karyakarte concluded.

Mr Vishok Mansingh, Director, Viman Aero Services LLP spoke about HEMS regulation which was issued in 2015, according to him not a single operator & helicopter is registered in HEMS category. The main reason of all difficulties being faced by the industry is which industry is not using of HEMS approved helicopter in HEMS category, he added. Mr Mansingh advised that firstly the industry should get the helicopters registered in this category, then operate and in the end identify the problems. He concluded by stating that Helicopter is not a transportation vehicle but a transformation tool, it can be used not only for economic development, but could also to transform lives.



Mr JS Gavankar, Managing Director, Safran Helicopters Engines recommended that DGCA should review the regulations for both fixed wing operation and helicopter operations and consider forming different guidelines for each operation. Stressing on the progress and future of helicopter industry, Mr Gavankar stated that demand on passenger segment is yet to be created. Since Single engine IFR operations will be a game changer in times to come, hence should be considered from a serious standpoint, he advised the industry experts. Also, the utilisation of civil residential complexes and corporate buildings made with helipads on top, Mr Gavankar concluded.

Retd. Air Marshal VK Bhatia, Advisory Board - Safety & Liason, BLADE, stated that Helicopters should now be seen as mode of Urban air mobility. Such mode demands helicopters to be treated as air taxis, he added. Apart from stressing on reconsidering Custom duty, the regulations should also be reviewed and formed considering global helicopters' scenarios, said Mr Dutta. He also focused on single engine helicopters which according to him should be brought in and be considered from safety perspective. Industry must also consider their impact on the operations while bringing such helicopters at par with international norms. At last, Mr Dutta requested the government to consider single engine IFR capable helicopters to be allowed to fly at night.



Dr Shalini Nalwad, Co Found & Director, ICATT indicated that 90 % of the people registered for organs, die before receiving the organs and that every four minutes there is one death four minutes there is one death. She further talked about a huge lack of training of the Doctors, since a paramedic cannot be sent on a 40 crore chopper to rescue people, therefore, we at ICATT have created a training programme for fellowship in Aeromedical Sciences, who are then referred as Aeromedical Commanders of India. Dr Shalini also stated that India needs one chopper per million, she took reference of Germany, where in they have 10-20% back up choppers. It is disappointing to say that for 1.3 billion, we still do not have one chopper as the specifications of DGCA, which is counted as HEMS chopper, she added. Considering the demand, India needs all kinds of available choppers including single and multi-engine helicopters, she concluded.

Mr Unni Pillai, Chief Test Pilot & Chief Instructor at HAL said that where Helicopter military fleets are increasing in number, the count of civil fleets is shrinking. The main reason is that this unique machine does not require similar infrastructure and same regulations as required for fix-swing, which makes it inoperable, hence it is paramount that for the growth of helicopter industry such regulations are lifted, Mr Pillai further elaborated. Also, the rate of casualty cannot drop till the regulations are lifted because the helicopter needs to land right where the patient is, he concluded.



Mr Uday Gellie, CEO, Heligo Charters Pvt Ltd suggested that the custom duty must be waved off on the helicopter brought on lease by the operators.

Smt Usha Padhee, Joint Secretary, Ministry of Civil Aviation before her vote of thanks focused on two points, she said Government needs to support in enabling the sector and as an enterprise, the sector needs to make it sustainable. Smt Padhee further said that both the government needs to work together for collaboration and meeting industry requirements.

She also indicated that to address and cater to the dynamic needs of helicopters and their operations in India there is a Helicopter Acceleration Cell which is the government's dedicated tool to engage with the sector.



Other Speakers' Perspectives

- ✈ Helicopter Industry needs to form a committee of experts
- ✈ Today the power of ease of doing business is restricted because of the necessary permissions.
- ✈ A separate section in DGCA guidelines for helicopters

Key Takeaways

- ✈ Single engine IFR operations should be looked into from a serious standpoint
- ✈ Utilisation of civil residential complexes and corporate buildings made with helipads on top
- ✈ Reconsider Custom duty and review regulations in respect with globally helicopters' scenarios
- ✈ India needs to have one chopper per million
- ✈ Considering the demand, India should now have all kinds of available choppers including single and multi-engine helicopters

Roundtable on Business Aviation

The Business Aviation Roundtable focused on the use of General Aviation aircraft for a business purpose. Business Aviation being a part of General Aviation focuses on the business use of airplanes and helicopters



Chaired by

Smt. Usha Padhee

Joint Secretary, Ministry of Civil Aviation,
Government of India

Panelists:

- ✈ **Smt. Usha Padhee**, Joint Secretary, Ministry of Civil Aviation, Government of India
- ✈ **Shri Amber Dubey**, Joint Secretary, Ministry of Civil Aviation, Government of India
- ✈ **Ms Kanika Tekriwal**, Co-Chair FICCI General Aviation Taskforce & Co-Founder & CEO, JetSetGo Aviation Services Pvt. Ltd. India
- ✈ **Shri Rohit Kapur**, President, JET HQ Asia
- ✈ **Shri Ranjan Mehra**, CEO, Club One Air
- ✈ **Gp. Capt. Rajesh K. Bali (retd.)**, Managing Director, Business Aircraft Operators Association (BAOA)
- ✈ **Shri Mangesh Karyakarte**, Chief Sales Officer, Air Works



Ms Kanika Tekriwal, Co-Chair FICCI General Aviation Taskforce & Co-Founder & CEO, JetSetGo Aviation Services Pvt. Ltd. India

- ✈ In last one year, JetSetGo has imported and made operational about 6 aircraft and leased India's first plane
- ✈ There are not enough aircraft available, to fly, to own, to buy. To meet the massive supply crunch on the aircraft, it makes it paramount to use the currently available assets in the best way possible
- ✈ In last 6 months, about 80 aircraft import applications have been submitted which showcases the interest of people in the industry
- ✈ More than 600 pilots are being employed in General Aviation
- ✈ There are about 25% of GA/BA aircraft in India which are standing on grounds without engines because engine MRO abroad do not have slots

Mr Rohit Kapur, President, JETHQ Asia



- ✈ General and Business Aviation is the key growth enabler and significant for the growth of the country.
- ✈ Government now understands how this industry helps in growth of the country by adding to the GDP as well as in employment of the country
- ✈ Post-covid, people prefer travelling privately over commercially, hence there is huge demand for charter services
- ✈ The key issue is that demand is huge, but the supply is inadequate
- ✈ OEMs have ramped up their production, however the delivery time takes more than 2 years
- ✈ Government has also started looking at different models, since not everyone can buy aircraft, the idea of sharing the aircraft should be considered which works globally
- ✈ Government must step in to make finance easily available for people who have viable business models
- ✈ Any OEM will setup the facility in India only when there is a business scale which depends on presence of high number of aircraft. Government can facilitate a way that in making India a regional hub for OEMs
- ✈ The Gift city concept will prove to be the great growth enabler for the country



Mr Ranjan Mehra, CEO, Club One Air

- ✈ Pandemic has changed the perception towards Chartered flights and general aviation. People have realized that safety is more important than luxury and comfort
- ✈ The support that this industry is receiving from the government is appreciable
- ✈ The gift city and fractional ownership are some areas where government has been engaging hence it seems that the outcomes of the same will be positive

GP. Capt. Rajesh K. Bali (Retd.), Managing Director, Business Aircraft Operators Association (BAOA)

- ✈ Focus should be on safe, efficient and sustainable growth of Business Aviation in India
- ✈ Cost of owning and operating the aircraft are some challenging areas. Unavailability of fund for using aircraft for business purposes
- ✈ Industry has proposed the idea of fractional ownership to the concerned Ministry. It has also requested the Ministry to reduce the cost of owning and operating the aircraft
- ✈ Rationalizing of the IGST and Custom Duty, also Government must realize that duty needs to be rationalized on engine repairs or imports of aircraft in private category
- ✈ Operating cost and charges must also be rationalized, since industry do not have volumes to have their own ground handling space or hangers for maintenance
- ✈ The small aircraft do not require comprehensive ground handling as required by the bigger aircraft, therefore charges must be reconsidered



Mr Mangesh Karyakarte, Chief Sales Officer, Air Works

- ✈ There is economy of scale in commercial MRO which is not there in Business aviation. With 50 types of aircraft available, it is difficult to have such a capital-intensive industry to sustain an MRO
- ✈ For 50 types of aircraft operating, the engineers and technicians are also thin and sparsely located, hence more trained people are required
- ✈ High cost of training is another challenge. The professionals can only be trained in institutes based outside India; hence the cost of training doubles the pressure on MROs. DGCA and Ministry should consider online mode of training

Mr Rohit Mathur, Heritage Aviation Pvt Ltd.

- ✈ India has a lesser volume of aircraft types in India, both in fixed wing and helicopter. When a component falls due for maintenance, most of the OEMs do not have authorized vendor anywhere in the world, only OEMs to which components can be sent for overhaul, they charge exorbitantly, making it difficult for the operator
- ✈ OEMs should set up maintenance shops in India and large MROs like Air Works should be authorized to do component overhaul to get maintenance done locally, government is requested to take a note of it
- ✈ The regulator policies are designed as per the regulations of the airlines. The policies are being formulated with respect to FA or ICAO. Where FA has 15,000 business aircraft while in India, it is less than 500, hence there should be a balance
- ✈ To promote domestic industry there should be separate norms for airlines for international and domestic operations.



Mr Nari William Singh, Director General Jamaica Civil Aviation Authority In Jamaica, considering the slow pace of any regulatory change, Jamaica Civil Aviation authority uses risk-based approach to deal with the requests received from the industry. The risk-based approach has worked in many instances in giving concessions depending on the complexity of the operation whether it is private, small operator and large commercial, hence this approach has helped our local industry.

Other Speakers' Perspectives

- ✈ When an operator submits the application to import or induct an aircraft in its NSOP, the timeline should also be incorporated in the procedure
- ✈ India lacks engines and accessories for business charters, and even for smaller areas, the aircraft is sent abroad which is expensive, hence the ministry is requested to extend the support on the same
- ✈ Lack of training programme for the regulators

Key takeaways

- ✈ General and Business Aviation are the key growth enabler and significant in growth of the country
- ✈ Easing out availability of funds to use aircraft for business purpose
- ✈ Concept of fractional ownership should be considered to reduce the cost of owning and operating the aircraft
- ✈ Rationalizing of the IGST and Custom Duty on engine repairs or imports of aircraft in private category
- ✈ Need for more trained engineers and technicians and establishment of MRO training institute in India to save costs on training
- ✈ Government's role in making India a regional hub for OEMs

Panel Discussion 1

The Outlook: Aviation Financing And Leasing

The Session focuses on the reforms and changes that IFSC, like GIFT city in Gujarat, will enable to make India a compelling alternative to existing leasing destinations thus fulfilling the vision of Atmanirbhar Bharat in aviation.



Moderator

Mr. Alok Anand,

Chairman & CEO, Acumen Aviation

Panelists:

- ✈ **Mr. Prakash Rao**, ED & CIO, NIIF
- ✈ **Mr. Simran Singh Tiwana**, CEO, Star Air
- ✈ **Mr. Dipesh Shah**, Executive Director (Development), IFSCA
- ✈ **Mr. Rajarshi Sen**, CFO and Sr VP Leasing, Vman Aviation Services IFSC Pvt. Ltd.
- ✈ **Mr. Vasuki Prasad**, Sales Director – APAC, Embraer



Mr Alok Anand, Chairman & CEO, Acumen Aviation

- ✈ Lack of participation from Indian Banks regarding funding.
- ✈ Clarity between the different regulatory authorities about old dues.
- ✈ Basic Custom Duty (BCD) applicability to be resolved.
- ✈ Implementation of Cape town Convention Act.
- ✈ Linkage of RCS scheme to IFSC based leasing.

Mr Prakash Rao, ED & CIO, NIIF

- ✈ Role played by GoI and IFSCA: With the Rupee Raftaar report and the subsequent development of the framework of aircraft leasing at GIFT City, Ministry of Civil Aviation and IFSCA have played a commendable role in the development of the aircraft leasing business at GIFT City. This not only eases the process of doing business at GIFT City, but also portrays a very positive image of India to global investors.
- ✈ Importance of domestic financing institutions: Domestic lending institutions are yet to take aircraft leasing as a business different from airlines, and international banks have been the primary providers of debt capital to the lessors currently leasing out of GIFT City. For the development of the ecosystem, for the capital to remain within India and for GIFT City to be at par with other global jurisdictions, it is important for the domestic lending institutions to positively look at the sector.
- ✈ Importance of human capital: The development of human capital at GIFT City will be paramount for the jurisdiction to be at par with other global jurisdictions. IFSCA looking at courses for aircraft leasing and financing at the global university being set up at GIFT City will not only further enable the development of the leasing ecosystem at GIFT City but may also help the domestic lending institutions further develop their understanding of the entire aviation sector.



Mr Simran Singh Tiwana, CEO, Star Air

- ✈ Indian banks need to participate in funding leasing from IFSCA.
- ✈ New airlines can be a good starting point as the fund requirements are low.
- ✈ For any Airline to go with IFSCA leasing the Cost and Value of the deal must workout. And if the airlines benefit more from an Indian Lease, it will be an easier transition.



Mr Dipesh Shah, Executive Director, IFSCA

- ✈ Government of India has taken several steps to operationalize Aircraft Leasing and Financing from GIFT-IFSC in India.
- ✈ In the last one-year, various incentives, regulatory framework, operating modalities have been provided to the industry. Currently, around 13 leasing companies have already been licensed by IFSCA and around 20-30 small, medium, and large aircraft are being planned to be leased from GIFT-IFSC.
- ✈ To make GIFT-IFSC a hub for Aircraft Leasing and Financing, large Indian airlines shall also start availing leasing services from GIFT-IFSC which over a period will help GIFT-IFSC to become a hub for Aircraft Leasing and Financing for South-East Asia also.

Mr Rajarshi Sen, CFO and Sr VP Leasing, Vman Aviation Services IFSC Pvt. Ltd.

Following immediate support is required for Aircraft leasing companies based in GIFT city to enable them to level the playing field and continue leasing operations in an economical and efficient manner

- ✈ MOCA -Advisory group for aircraft leasing activity based in GIFT City
- ✈ DGCA – Outstanding payment of the previous operator for the in-country transfer
- ✈ Action Requested -DGCA: Alignment of AIC 12/2018 for Aircraft in-country transfer from GIFT City to provide a level playing
- ✈ The purpose of the circular is to restrict the liability of the Lessor to the previous three months in case the Aircraft is withdrawn from the current operator due to default.
- ✈ Any Aircraft Leasing company based in GIFT city or outstanding India can transfer Aircraft within India from one operator to other operators without exporting out the Aircraft from India
- ✈ The issues faced for in-country transfer
- ✈ Aircraft Re-registration process for in-country transfer from one operator to other for Aircraft operated in India
- ✈ Custom Duty on NOSP for small aircraft / Helicopter on lease
- ✈ Custom Procedure for Leasing in GIFT City
- ✈ Funding for Leasing company based in GIFT City
- ✈ Waiver of the TDS from the lease payment to GIFT City-based leasing company
- ✈ UDAN Route -Aircraft needs to be leased from the GIFT City





Mr Vasuki Prasad, Sales Director – APAC, Embraer

- ✈ India is beyond Tier I to Tier I connectivity.
- ✈ Gaps in connectivity exist between Tier I and Tier II / III, and Tier II/III to Tier II/III cities.
- ✈ India is too large to be served only by turboprops. Regional jets are needed.
- ✈ Embraer is the world's third largest aircraft manufacturer and the world's only regional jet manufacturer.
- ✈ Regional airlines in India have all failed, due to various reasons.
- ✈ The RCS scheme helps airlines and brings in viability, and we applaud this scheme.
- ✈ RCS, with its fixed revenue, can reduce the risk associated with leasing to regional airlines. This improved risk perception also helps lower leasing risk and, in some cases, cost.
- ✈ However, RCS can address some, but not all issues.
- ✈ Cost is always a concern in the industry, and the India based leasing from IFSCA can help with cost.
- ✈ Investing in aircraft as an asset can be mutually beneficial for Indian nonairline companies, which can charge Indian lessees only the gap to desired gains, thereby reducing leasing costs for regional airlines.
- ✈ Focusing on regional aircraft is better as regional aircraft cost a lot less than the larger aircraft operated by non-regional airlines. The leasing ecosystem for non-regional aircraft is anyways better established.
- ✈ Of course, the IFSCA based leasing needs more credibility through more transactions, and a degree of maturity to address certain hurdles. This will eventually happen in due course of time.
- ✈ A thriving regional aviation landscape is possible with the combination of RCS and benefits associated with India's IFSCA based leasing.

Key Takeaways

- ✈ Advisory group for aircraft leasing activity based in GIFT City
- ✈ The issues faced for in-country transfer
- ✈ Waiver of the TDS from the lease payment to GIFT City-based leasing company
- ✈ UDAN Route -Aircraft needs to be leased from the GIFT City
- ✈ Gaps in connectivity exist between Tier I and Tier II / III, and Tier II/III to Tier II/III cities.
- ✈ India is too large to be served only by turboprops. Regional jets are needed.
- ✈ Lack of participation from Indian Banks regarding funding.
- ✈ Clarity between the different regulatory authorities about old dues.
- ✈ Basic Custom Duty (BCD) applicability to be resolved.
- ✈ Implementation of Cape town Convention Act.
- ✈ Linkage of RCS scheme to IFSC based leasing.

India-UK Roundtable with British High Commission And Uknats



Chaired by
Shri Sanjeev Kumar, IAS
Chairman, Airport Authority of India

Delegates from:

India (Airports Authority of India)

- ✈ Mr. Sanjeev Kumar, Chairman AAI
- ✈ Mr. M. Suresh, Member ANS
- ✈ Mr. B K Sarkar – Executive Director (ATFM/CARO)
- ✈ Mr. OS Ekka – Executive Director (CAP)
- ✈ Mr. K Vasudevan – Executive Director (ASM)
- ✈ Mr. P K Hazari – General Manager (ATM)

United Kingdom

- ✈ Dr Andrew Fleming, British Deputy High Commissioner to AP and Telangana
- ✈ Mr. Niall Ahern, First Secretary – Trade - DIT
- ✈ Mr. Bart D'Souza, Head – Aerospace - DIT
- ✈ Ms. Pravalika Inala, Senior Trade & Investment Advisor – Infrastructure - DIT
- ✈ Mr. Arun Abraham, Senior Trade & Investment Advisor – Aerospace & Space - DIT
- ✈ Mr. Alex Rickards, Head of Accounts & Partnerships – NATS
- ✈ Mr. Andy Foxhall, Principal Account Manager – NATS

Dr Andrew Fleming, British Deputy High Commissioner to AP and Telangana

- ✈ Dr Andrew Fleming in his opening remarks set the context on the priority the UK government places with its engagement with India, particularly with the objective of delivering on the 2030 Roadmap announced by both Prime Ministers last year. He also referred to the active work done by the two governments towards a Comprehensive Free Trade Agreement between the two countries. He hoped the roundtable discussion will help towards delivering this ambition through greater cooperation in the aviation sector.
- ✈ Dr Fleming also listed UK's capabilities in the aviation sector underpinned by its strong supply chain and leading specialisms in air navigation services, MROs, structures, systems, propulsion, and whole aircraft capabilities. He highlighted, as the prime Air Traffic Control provider within the UK, NATS having a deep understanding of the challenges created by aviation growth and the impact this has on the capacity and efficiency of airports and airspace. systems, propulsion, and whole aircraft capabilities. He highlighted, as the prime Air Traffic Control provider within the UK, NATS having a deep understanding of the challenges created by aviation growth and the impact this has on the capacity and efficiency of airports and airspace.
- ✈ Dr Fleming mentioned India's scale and robust civil aviation market will focus on how flights operate seamlessly with optimal capacity of its airspace design. He identified this as a project area India and the UK can work on together.



Mr Sanjeev Kumar, Chairman AAI

- ✈ In AAI's response, Mr Sanjeev Kumar acknowledged UK's strength in technology and particularly, the economic structuring of air traffic navigation operations. He mentioned AAI played a dual role –that of an airport operator and developer of new greenfield airports. He mentioned the focus was to privatise airports which have matured in terms of operation and economics.
- ✈ Mr Kumar further added, AAI's interest would lie in technologies that are appropriate and affordable for the development of new airports in unconnected areas. He also listed the advantages of working with AAI - given it has over 100 airports under operation and a further 50 to be developed in the next 4-5 years, providing huge economies of scale and faster ROI. He also mentioned the manufacturing opportunity that could be explored in India to optimise cost overheads.

Mr Alex Rickards, Head of Accounts & Partnerships – NATS & **Mr Andy Foxhall**, Principal Account Manager – NATS

- ✈ Mr Alex Rickards and Mr Andy Foxhall then proceeded to give a presentation starting with a brief history of NATS' previous engagements in the Indian market listing Airport Capacity studies conducted with private operators in the country aimed at optimising performance. They underscored that India was a market of priority for NATS.
- ✈ Mr Foxhall listed out in-detail areas of potential collaboration that NATS and AAI could jointly explore. The areas described were:
 - I Airport operations - supporting growth and unlocking capacity within Indian aviation by developing a roadmap of activities designed to optimise ATC operations at airports and in the airspace within the immediate vicinity of aerodromes.

II Airspace operations - supporting growth and unlocking capacity within Indian aviation by developing a roadmap of activities designed to optimise the airspace and associated ATC processes and procedures within the Terminal Manoeuvring Areas and wider national airspace

III Environment - leading on the environment and establishing plans to reduce carbon emissions in line with 'Net Zero' objectives.



IV Civil / Military - seeking closer collaboration between Civil and Military authorities to the benefit of all airspace users.

V Digital technology - exploiting maximum potential from Digital Tower (and other) technology to support the growth of Indian aviation and the development of the RCS-UDAN.

VI UTM - integrating new airspace users (e.g. UTM and UAM) and collaborating on their interoperability with ATM.

VII Research and Development - undertaking Research & Development initiatives to design future ATM solutions through innovative thinking and collaboration.

VIII Skills - investing in how we develop the skills and capability of our workforces to fulfil the future demands of the aviation industry.

✈ There was a particular focus and interest in enhancing and optimising ATC operations at airports and within airspace and in particular the NATS' 3Di technology - a no-cost algorithm developed by NATS to benchmark optimal flight-paths against environmental parameters.

✈ Additionally, Mr Kumar expressed an interest in understanding more how NATS reviews its regulatory structures and processes to balance ANS pricing with the level of service provided and scale of future investments required. It was agreed this would form a ninth collaboration area.

✈ **Mr Kumar in his response mentioned that AAI's interest would certainly lie in methods/technologies used to optimise ATC operations and particularly singled out 3Di as a good starting point to initiate a discussion. He was keen that the two teams chart out an agenda for the next few years and identify 'low-hanging fruits' to further the cooperation. In his final comments, he mentioned he viewed the partnership with positive intent and was keen to provide support towards this goal, also mentioning the discussion as “Day Zero and keen to take the cooperation forward.”**

Mr Rickards replied that the team at NATS would be keen to engage with AAI for further discussion and potential training that could be provided on the 3Di technology. He also opined that the next steps for engagement be furthered under a structure of an MOU agreement.

✈ With regards to next steps, Mr Sarkar, Executive Director - AAI, mentioned a new version of a draft MOU would be shared with the NATS/DIT team. Post agreement from both parties, the draft would then be sent to the Chairman's office for clearance, and thereafter clearances would be sought from the Ministry and Cabinet office. He opined the process would take a few months. In the interim, the team at AAI would be open to engage with NATS/DIT on taking discussions forward in parallel.



- ✈ Mr Rickards, in his final comments, mentioned NATS would be happy to work on a proposal along the contours of the roundtable discussion which will be submitted to Member – ANSP's office and thereon proceed with the MOU process.
- ✈ Dr Fleming, in his final comments, thanked the Chairman and his team for their time and hoped the discussion would initiate a strong collaboration between the UK and India in the areas of Air Navigation. He also extended an invitation to the Chairman to visit the UK to see first-hand the facilities and technologies operated by NATS at airports around the UK.

Mementos were exchanged among Chairs of the UK and Indian delegation

Key takeaways:

- ✈ collaboration MoU Framework. In keeping with discussions above, a revised draft MoU by NATS to include agreed areas for collaboration be proposed to AAI, for internal deliberations and approvals vide para 10 above. Also, due to the sensitivity of potential discussions and/or information a Mutual Confidentiality Agreement alongside, also to be initiated by NATS.
- ✈ knowledge sharing. In keeping with Chairman's missive towards collaboration and the session marking 'Day 0', NATS proposed two knowledge sharing areas which could commence immediately; environmental initiatives and ANS pricing structure
- ✈ AAI Delegation visit to UK. AAI delegation on the side-lines of the Farnborough International Airshow from 18th to 22nd July 2022 may plan a tour of the NATS Digital Tower laboratory located within the London Heathrow ATC tower and the London City Airport Digital Tower based within the radar centre in Swanwick near Southampton.
- ✈ Roadmap to India's Unified Airspace management. AAI ANS with NATS work out short term plans with timelines to show tangible deliverables in areas of collaboration that take this engagement to the next level



Panel Discussion 2

Air Cargo, Resilient In Paradigm Shift: A Perfect Illustration

The session illustrates the Air cargo resilience despite challenges by exemplary anecdotes, deliberates the changing nature of EXIM flows, industrial and agriculture cargo in the pandemic times, safety and addressing the immediate needs and eliminating long term deterrents.



Moderator:

Mr. Satish Lakkaraju,
Sr. Vice President, Wiz Freight

Panelists:

- ✈ **Mr. Ajay Kumar**, CEO, AAI Cargo Logistics and Allied Services Co. Ltd.
- ✈ **Mr. Kerry Mok**, President & CEO, SATS, Singapore
- ✈ **Ms. Tulsi Nowlakha Mirchandaney**, CEO, Blue Dart Aviation
- ✈ **Mr. Suvendu Choudhury**, Managing Director, International Operations, FedEx Express
- ✈ **Mr. Saurabh Kumar**, CEO, GMR Cargo

Mr Satish Lakkaraju, Sr. Vice President, Wiz Freight

- ✈ Mr. Satish Lakkaraju opened the session recognizing the effort of the Supply chain professional and Logisticians who had worked hard during the pandemic to ensure that the essential commodities, Pharma, and other medical equipment's moved across the country. He even mentioned that India had ensured that vaccine was available for India and many other countries.

The Majors points that we discussed:

- ✈ Manpower importance and the need to take care of the manpower as the cargo business is still high dependent on human intervention
- ✈ Technology deployment and doing Digital is the future for the industry



Mr Ajay Kumar, CEO, AAI Cargo Logistics and Allied Services Co. Ltd.

- ✈ During the discussion, it was emerged that certain facilities such as Live Animal Export can be considered at certain airports only, not at all airports.
- ✈ A meeting will be convened amongst stakeholders to identify the airports where such facilities can be created based on the potential export from that airport.

Mr Kerry Mok, PCEO, SATS Ltd.

Greater Collaboration within the Aviation Eco-system

The COVID-19 pandemic has brought about a greater degree of collaboration between cargo handlers and airlines. Airlines, cargo handlers and other aviation stakeholders need to maintain this degree of collaboration beyond the pandemic. In fact, all parties should work towards deeper integration, especially when it comes to data analytics, so that air cargo operations become even more agile to meet future challenges and crises. **Greater Support and Empathy for Staff during the Pandemic Reversing the Great Resignation and Brain Drain within the Aviation Industry** Air cargo handlers have faced immense challenges in retaining talent during the COVID-19 pandemic. Meanwhile, the aviation industry must use this pandemic as an opportunity to invest in digital technologies to ensure that airport operations become even stronger than what they were during pre-COVID times. **Role of Technology in Driving Productivity and Making Tasks Easier for Staff** Investing in technology that automates basic tasks so that staff can do higher value-added work will help drive productivity in the air cargo industry.



Ms Tulsi Nowlakha Mirchandaney, CEO, Blue Dart Aviation

- ✈ The pandemic brought to the fore the importance of air cargo as a lifeline to the country when all other forms of transportation were shut down.
- ✈ There was no 'work from home' for freighter operators. Every cargo airline employee worked through a difficult 2 years with restricted public transport, no catering, working together in large numbers maintaining airworthiness of aircraft, and flying for extended periods away from home, to bring in the much needed medical and other urgent supplies.
- ✈ With no prior experience in international operations, Blue Dart Aviation morphed from a pure domestic cargo airline operator to an international charter operator within 3 weeks, in response to MoCA's call to stand in solidarity with a nation in need. The 1st charter flight was operated from Guangzhou to Guwahati on 15 Apr 2020 and was met on arrival by a grateful health minister of the state.



Lessons learned

- ✈ It was perhaps one of the finest displays of the power of execution of the government machinery working in collaboration with the aviation industry, and the unity of purpose that followed a call to action.
- ✈ Technology became a friend and allowed contactless, close working across international borders.
- ✈ People were instrumental in delivering amidst extreme challenges and should be applauded and valued.
- ✈ If we are to be resilient, then we must first be sustainable; and to be sustainable, we must be certain of our existence at airports.
- ✈ Finally, on a lighter note, as Satish prophesied - air cargo airlines and the air cargo industry are unlikely to be recognized or rewarded for their contribution during the tough 2- year pandemic (the expectation was not a factor in driving action).



Mr Suvendu Choudhury, Managing Director, International Operations, FedEx Express On the resilience of the air cargo sector during the pandemic and FedEx's contribution to navigate through it:

- ✈ During the pandemic, the air cargo industry was a lifeline for society, delivering critical medical supplies and vaccines across the globe and keeping international supply chains open for essential and non-essential items.
- ✈ COVID-19 disrupted global supply chains in ways we could not have anticipated. The need for a more agile and resilient supply chain was brought to the fore. Companies in the supply chain industry, including FedEx, went to great lengths to continue moving the global economic recovery forward.
- ✈ One of the key learnings was that flexibility is critical – and we have shown this throughout the pandemic. **On the pandemic's impact on technology and e-commerce:**
- ✈ Technology played a pivotal role in streamlining the supply chain - the pandemic fast-tracked the implementation of newer technologies, enabled digital transformation, and brought higher levels of automation.

- ✈ E-commerce is a powerful force and is accelerating fast. Projections for the adoption of online shopping were pulled forward by several years thanks to the pandemic. Consumer expectations are rapidly changing, and sellers must keep up. **The need for sustainability in the air cargo sector:**
- ✈ Consumers are increasingly seeking products that are responsibly sourced, shipped sustainably and when returned are reused as much as possible. The path to reducing net emissions in the air cargo sector will require a collective effort and effective collaboration across the ecosystem.”
- ✈ The Indian government made an ambitious commitment to achieve net zero emissions by 2070. We realize we are a part of that equation and have our own goals to achieve carbon-neutral operations by 2040, globally. In India, we've recently commenced EV trials in Bangalore and all FedEx packaging are 100% recyclable—just another way we connect the world in responsible and resourceful ways.

Mr Saurabh Kumar, CEO, GMR Cargo

- ✈ Pandemic increased the focus on automation and paperless process
- ✈ India's Air Cargo sector became more productive and efficient
- ✈ The peak hour productivity during Covid was around 40-50% more
- ✈ Collaboration among stakeholder was one of the best outcomes during this period, which went much beyond the usual competition. This would help the industry a lot as we move ahead into the future
- ✈ Technology and automation came to the forefront and became a critical enabler for the industry to be competitive and meet the future demand



Key takeaways:

- ✈ Manpower importance and the need to take care of the manpower as the cargo business is still high dependent on human intervention.
- ✈ Technology deployment and doing Digital is the future for the industry.
- ✈ Airlines, cargo handlers and other aviation stakeholders should work towards deeper integration, especially when it comes to data analytics, so that air cargo operations become even more agile to meet future challenges and crises
- ✈ Investing in technology that automates basic tasks so that staff can do higher value-added work will help drive productivity in the air cargo industry.
- ✈ COVID-19 disrupted global supply chains in ways we could not have anticipated. The need for a more agile and resilient supply chain was brought to the fore.
- ✈ E-commerce is a powerful force and is accelerating fast. Projections for the adoption of online shopping were pulled forward by several years thanks to the pandemic. Consumer expectations are rapidly changing, and sellers must keep up.
- ✈ Consumers are increasingly seeking products that are responsibly sourced, shipped sustainably and when returned are reused as much as possible. The path to reducing net emissions in the air cargo sector will require a collective effort and effective collaboration across the ecosystem.

Roundtable on Krishi UDAN by Invest India

The round table aimed at sensitizing relevant stakeholders about Krishi UDAN 2.0. Mr. Keku Gazder open the session.



A report on Potential of Tirupati Airport as an MRO Hub was also launched at the roundtable

Chaired by

Smt Usha Padhee

Joint Secretary, Ministry of Civil Aviation, Government of India

Panelists:

Dr. Maddila Gurumoorthy, Hon'ble MP, Tirupati Constituency, Andhra Pradesh

Smt. Usha Padhee, Joint Secretary, Ministry of Civil Aviation, Government of India

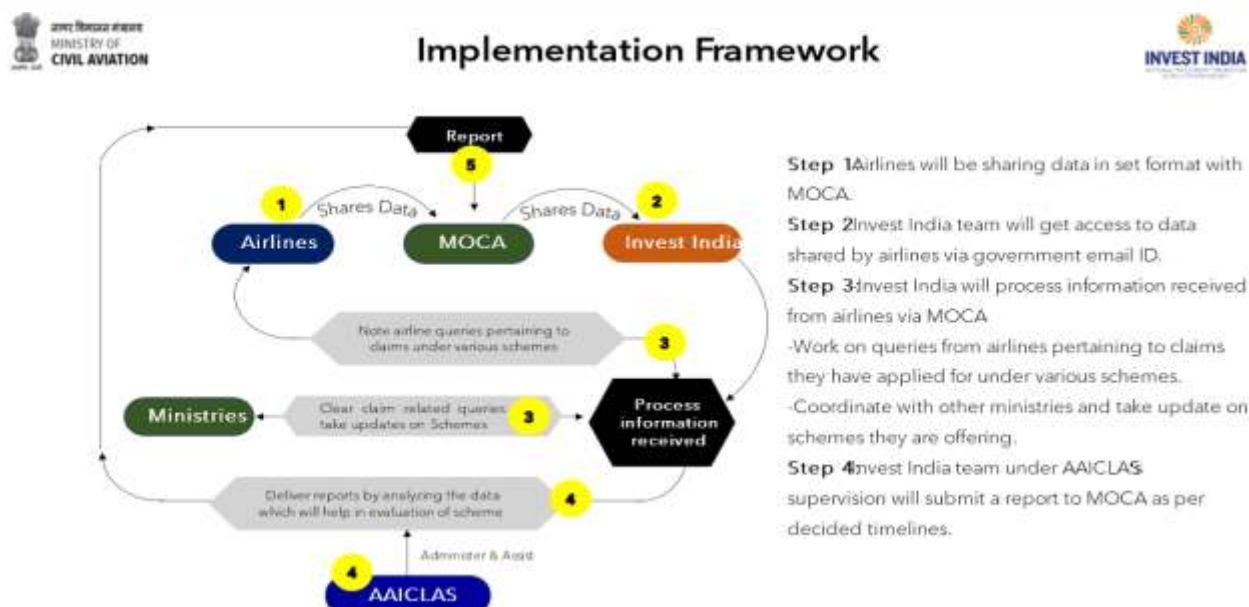
Shri Ajay Bharadwaj, CEO, AAICLAS

Shri Keku B. Gazder, Former CEO, AAICLAS

The Civil Aviation Ministry on October 27, 2021, launched **Krishi Udan 2.0 scheme** at FICCI. The scheme will give significant focus on optimizing and incentivizing air transportation of agricultural produce from hilly areas, northeastern states, and tribal regions across India.

The Krishi Udan 2.0 reflects the collaborative approach of the government towards policymaking. The scheme will boost the growth avenues for the agriculture sector and help them attain the goal of doubling farmers' income by optimizing the supply chain, logistics, and transportation of farm produce. For successful implementation of this Scheme, Ministry of Civil Aviation has been interacting with the key stakeholders and making improvements for better traction.

At Roundtable, Invest India team presented an internally designed implementation framework for the Krishi Udan 2.0 scheme. Process to be followed for implementing the scheme was explained using a quorum diagram (figure below).



Krishi Udan 2.0: Action Points/Steps Ahead

- ✈ Invest India to hire a resource for Krishi Udan 2.0 as per MOCA's request. (in progress)
- ✈ An Email ID will be created by Ministry of Civil Aviation which will be used to gather data from all the domestic airlines.

Krishi Udan 2.0: Queries / Suggestions

The panel at the roundtable attended to queries and suggestions during an interactive session with all the invitees. The area of discussion are:

- ✈ Inclusion of belly cargo
- ✈ ATF prices
- ✈ Inclusion of new routes in the scheme.

Panel Discussion 3

Making India A Global Drone Hub by 2030: Issues & Way Forward

Panel discussion on 'Making India a Global Drone Hub by 2030: Issues & Way Forward' discussed how the perception has changed on Drones especially with the use of drones as lifesaving tools in the battle against Covid-19. The session examined the future of drones with emphasis on technology, infrastructure, standard/regulations, safety, privacy, collaborations, R&D and public acceptance. The utility of drones far outweighs potential risks.



Chaired by

Shri Amber Dubey

Joint Secretary, Ministry of Civil Aviation, Government of India

Moderator:

Mr. Amit Ganjoo, CEO, ANRA Technologies

Panelists:

- ✈ **Mr. Ankit Mehta**, CEO, IdeaForge
- ✈ **Mr. Smit Shah**, President, Drone Federation of India
- ✈ **Mr. Mr. Deepak Bhardwaj**, Director & Co-Founder, IotechWorld Avigation Pvt. Ltd.
- ✈ **Mr. Vipul Singh**, Co-Founder & CEO, Aarav Unmanned Systems Pvt. Ltd.

Shri Amber Dubey, Joint Secretary, Ministry of Civil Aviation, Government of India My vision is that by 2030 we should have 90% of the domestic market and 25% of the global market.

- ✈ We have not banned imported technology; we have only banned import of consumer products.
- ✈ The current Drone Certificate is only for VLOS operations, BVLOS is yet to come, and its Policy work is all done.
- ✈ The initiatives such as the liberalized policy (Drone Rules 2021) and its timely implementation, the Production Linked Incentive (PLI) Scheme for drone and their components and the Subsidy Scheme for agricultural drones are going to be the key drivers for the revolution of the Indian drone industry.
- ✈ PLI (Production Lined Incentive) scheme introduction by government for promoting the MAKE IN INDIA initiative.
- ✈ Our government is very much industry focused, open to new ideas and encouraging Indian manufacturers to innovate and invest in India.
- ✈ Aviation policies are evolving, and they are scrupulously monitored for necessary amendments. We have new simple rules but no exemptions.



Mr Amit Ganjoo, CEO, ANRA Technologies

- ✈ Banning the import of complete drones at scale can be double edged sword.
- ✈ It advantages the local manufacturers, but do we have enough experience to create a product that can be reliable, scalable, and cost effective to compete at a global level
- ✈ Industry needs to look at this new space with an aviation mindset
- ✈ Liberal policies are in place, but we are lacking governance to ensure compliance as many in the industry are taking shortcuts to generate PR buzz
- ✈ Safety should always be given more importance than speed to market
- ✈ New liberal policies for drones in India have put the onus on the industry to step up and deliver

Mr Ankit Mehta, CEO, IdeaForge

- ✈ Remove IL for Non-Defense Drones and enforce IL for Defense Drones
- ✈ Clarify and improve SCOMET process for export of Drones
- ✈ Enhance PLI for Drones
- ✈ Track adoption of drones with various Govt. Departments in terms of Number of Drones in Sustained Service or Owned and Revenue to the Drone Industry and not on Drone events done or POCs conducted.





Mr Smit Shah, President, Drone Federation of India

- ✈ In past one year the drone industry has taken a paradigm shift. While the drone regulations have been liberalized, the drone certification standards are highly robust to maintain aviation safety and security.
- ✈ We have laid down the foundation for making India a Global Drone Hub, now, all stakeholders need to work in tandem to meet the timeline of achieving the same by 2030.
- ✈ Academia needs to focus on providing industry specific education to develop highly skilled manpower.
- ✈ Research Institutes need to work on the commercialization of Intellectual Property.
- ✈ Government shall provide an ecosystem like that of defence corridors to enable superior product development and export promotion.
- ✈ Drone Companies need to work on building cost-effective & state of the art, purpose-built drones that meet international standards.

Mr Deepak Bhardwaj, Director & Co-Founder, IotechWorld Avigation Pvt. Ltd.

- ✈ Drone Industry is growing, and the entire drone ecosystem is advancing.
- ✈ Huge number of Indian companies are investing in developing drone parts in India.
- ✈ BVLOS system is under testing of DGCA guidelines and Govt. is freezing their requirement/rules.
- ✈ New incentives such as PLI scheme is also available for the industry.
- ✈ Indian companies are optimizing manufacturing processes, costs and trying to pass benefits to Indian consumers.



Mr Vipul Singh, Co-Founder & CEO, Aarav Unmanned Systems Pvt. Ltd.

- ✈ We are running some of the largest drone programs both government and private.
- ✈ We need not to be dependent on foreign components, OEMs, and technologies to be able to serve Indian market.
- ✈ We need to capture the 25-30% of the global market, only catering to the Indian market does not make us a hub in the world.
- ✈ None other country than India is as cost sensitive as we are. None of our procurement system, let it be government or private is driven purely by quality-based selection. All of them are low-cost space, so we are also capital efficient.

Key takeaways:

- ✈ By 2030 we should have 90% of the domestic market and 25% of the global market.
- ✈ The current Drone Certificate is only for VLOS operations, BVLOS is yet to come, and its Policy work is all done.
- ✈ Banning the import of complete drones at scale can be double edged sword. It advantages the local manufacturers, but do we have enough experience to create a product that can be reliable, scalable, and cost effective to compete at a global level
- ✈ Industry needs to look at this new space with an aviation mindset vs IT mindset
- ✈ Liberal policies are in place, but we are lacking governance to ensure compliance as many in the industry are taking shortcuts to generate PR buzz
- ✈ Safety should always be given more importance than speed to market
- ✈ New liberal policies for drones in India have put the onus on the industry to step up and deliver
- ✈ Remove IL for Non-Defense Drones and enforce IL for Defense Drones
- ✈ Clarify and improve SCOMET process for export of Drones
- ✈ Enhance PLI for Drones
- ✈ Track adoption of drones with various Govt. Departments in terms of Number of Drones in Sustained Service or Owned and Revenue to the Drone Industry and not on Drone events done or POCs conducted.
- ✈ Academia needs to focus on providing industry specific education to develop highly skilled manpower.
- ✈ Research Institutes need to work on the commercialization of Intellectual Property.
- ✈ Government shall provide an ecosystem like that of defence corridors to enable superior product development and export promotion.
- ✈ Drone Companies need to work on building cost-effective & state of the art, purpose-built drones that meet international standards.

Inauguration of



***WINGS INDIA
2022***

Inauguration of Wings India 2022





Inaugural Session: India@75: New Horizon For Aviation Industry



Dignitaries on Dias:

Shri Jyotiraditya M. Scindia, Hon'ble Minister of Civil Aviation, Ministry of Civil Aviation, Government of India

Shri Dushyant Chautala, Deputy Chief Minister of Haryana

Shri Vemula Prashanth Reddy, Hon'ble Minister of Roads, Buildings, Legislative Affairs and Housing, Government of Telangana

Mr. Jean Baptiste Djebbari, Hon'ble French Minister of State for Transport, Minister for Ecological Transition, France

Mr. Ngampasong Muongmany, Hon'ble Vice Minister of Public Works and Transport, Laos

Mr. Prem Bahadur Ale, Hon'ble Minister of Culture, Tourism and Civil Aviation, Nepal

Shri Nakap Nalo, Hon'ble Minister of Civil Aviation, Government of Arunachal Pradesh

Shri Rajiv Bansal, IAS, Secretary, Ministry of Civil Aviation, Government of India

Shri Sanjeev Kumar, IAS, Chairman, Airports Authority of India

Smt. Usha Padhee, Joint Secretary, Ministry of Civil Aviation, Government of India

Mr. Remi Maillard, Chairman, FICCI Civil Aviation Committee and President & MD, Airbus Group, India & South Asia

Shri. Jyotiraditya M. Scindia, Hon'ble Minister of Civil Aviation, Government of India addressing the gathering at the inaugural ceremony of Wings India 2022 at Hyderabad today. Speaking on the occasion, Minister said that out of the population of 135 crore only 14.5 crore people travel by air through civil aviation. To industry leaders, Mr. Scindia said that we are here to serve you, as our success lies in your success. We want to be a constructive collaborator and not a restrictive regulator. Minister announced that from 27th March onwards, India will be opening up 100 per cent international operations. The number of passengers stood at 344 million (2018-19) and is close to 300 million in 2022-23 and is expected to surpass 410 million passengers by 2024-25, a new historic record, he said. The UDAN scheme, which fulfils the aspirations of common man wearing hawai chappal to fly in hawaijahaz, aims to connect every single citizen to be able to fly. Under UDAN, 409 routes are operational now and 1,75,000 flights have flown till

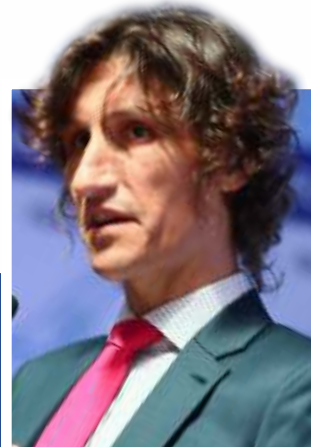
date proving last mile connectivity. Our mission is to plant strong roots of civil aviation ecosystem in India, Mr. Scindia said. Minister put light on the new policies and initiatives of the Government like scrapping of duties, lowering of GST, etc. for MROs. Speaking about the drone, Mr. Scindia said that it is time for India to be a global leader and not a global follower. The area of Drones present that opportunity, he said. The role of the Government is three fold viz. Policy making, creating incentive, and creating demand. In the sector of Drones, we have done all the three. Ministry of Agriculture, Ministry of Petroleum, Ministry of Panchayat Raj, etc. have been asked to use Drones. The Indian government is using Drones to map its six lakh villages, he informed. Airlines, building of Airports, infrastructure, will power growth and create ripples. 3.1 is the economic multiplier for every dollar invested in aviation. The aviation industry has a employment multipliers of 1:6.1, i.e. for every 1 direct job it creates 6.1 indirect jobs. Civil aviation is probably one of the largest employment generation sectors in the world, Mr. Scindia said.





Shri Sanjeev Kumar, IAS, Chairman, Airports Authority of India in his welcome address said that the Wings India 2022 event had the presence of 3 countries' ministers, participation of 23 country delegates, 24 states and 8 partner states. Spread over 8000 sq.m., Wings India 2022 has 125 stalls representing airports, service providers, etc. having various roundtables and 6 panel discussions covering the entire gamut of civil aviation. After two years of hiatus, we are going to see double-digit growth in aviation sector, Mr. Kumar said.

Mr Remi Maillard, Chairman, FICCI Civil Aviation Committee and President & MD, Airbus Group, India and South Asia said that the aviation industry in India has been a story of remarkable in last 20 years, the traffic has multiplied by factor of 9, and India has established itself as the 3rd largest aviation market in the world. The records that we have witnessed in India has been top of the world for the last 20 years. The potential that we have in front of us remains significant because the per capita index in India remains limited to .12 which is three times lower than countries such as China or Indonesia, which signify that the centre of gravity of aviation is moving East and is on high trajectory to land in India. Foreign carriers have captured 94% of the gross in the Indian aviation market for last 20 years, leaving only 6% for the Indian carriers of this gross. All forecast predicts that India will remain first in gross in next 20 years amongst the G20 countries, cargo and passenger traffic. We shall continue to develop a very vibrant and holistic aviation ecosystem with maintenance capabilities, training, leasing, services, engineering, and manufacturing.



Shri Rajiv Bansal, IAS, Secretary, Ministry of Civil Aviation, Government of India said that India is poised for remarkable growth across every spectrum and facet of civil aviation. Steps such as making airports, developing small airstrips, UDAN, reaching out to Tier-3 and Tier-4 entail Indian citizens to take advantage of movement by air.

Shri Vemula Prashanth Reddy, Minister of Roads, Buildings, Legislative Affairs and Housing, Government of Telangana said that aviation and aerospace are the thrust areas for Telangana. The availability of a highly skilled workforce is the strength of Telangana, he added. Mr Reddy further stated that Telangana is among the first states to slash the VAT and ATF from 16% to 1% and also the first to have released its own Drone policy to develop an ecosystem for drone industry. The state government is actively working with start-ups and industry partners to commence drone usage in healthcare, agriculture, mining, and law & enforcement etc.



Releases & Signing of MoU, Lol & Scheme

The Minister for Civil Aviation released a knowledge paper – India: Emergence of a global leader in Aviation; Wings India 2022 Exhibitor's Directory. A new sub-scheme to promote small aircraft, Helicopters & Seaplanes under UDAN was released. An Exchange of Intent of Cooperation took place between HAL and PHL for long term lease of 20 helicopters; Flybig and De Havilland Aircraft company of Canada also exchanged of Letter of Intent for enhancing last mile connectivity and hinterland connectivity in the presence of the Civil Aviation Minister.



Ministerial Plenary

In Ministerial Plenary Session, The Dignitaries share their vision on enhancing the Aviation ecosystem and put forth key analytical inputs on the challenges and way forward to develop a sustainable and robust aviation sector.



Dignitaries on Dias:

Shri Jyotiraditya M. Scindia, Hon'ble Minister of Civil Aviation, Ministry of Civil Aviation, Government of India

Shri Dushyant Chautala, Deputy Chief Minister of Haryana

Shri Vemula Prashanth Reddy, Hon'ble Minister of Roads, Buildings, Legislative Affairs and Housing, Government of Telangana

Mr. Jean Baptiste Djebbari, Hon'ble French Minister of State for Transport, Minister for Ecological Transition, France

Mr. Ngampasong Muongmany, Hon'ble Vice Minister of Public Works and Transport, Laos

Mr. Prem Bahadur Ale, Hon'ble Minister of Culture, Tourism and Civil Aviation, Nepal

Shri Nakap Nalo, Hon'ble Minister of Civil Aviation, Government of Arunachal Pradesh



Mr Jean Baptiste Djebbari, Hon'ble French Minister of State for Transport, Minister for Ecological Transition, France while addressing at Ministerial Plenary session stated that this year, we are celebrating the 75th anniversary of the Indo-French Aero Services Agreement. Aviation and aeronautics are a great part of trade between the two countries, he added. The French Minister also emphasized on mutual action of both India and France towards sustainable aviation fuel.

Mr Ngampasong Muongmany, Hon'ble Vice Minister of Public Works and Transport, Lao during his addressal mentioned about the Air service agreement signed between Laos and India in 2019. He emphasized on the usage of renewable energy for aviation industry which will reduce the dependence on the fuel as well as save the cost and reduce carbon emission making aviation industry environmentally friendly. We can strengthen the cooperation on Aviation industry by establishing the cooperation between Laos and India.



Mr Prem Bahadur Ale, Hon'ble Minister of Culture, Tourism and Civil Aviation, Nepal during his addressal at ministerial plenary session took invited the august gathering to visit the birthplace of Lord Buddha in Nepal. He informed that the international airport in Nepal ready for full-fledged operations within next 6 months. Mr Ale invited all international carriers to operate from Nepal's upcoming international airport. Nepal Aviation policy is friendly in foreign

investment, and we are open for foreign investment in airlines, training organisations, aircraft maintenance and other aviation activities, he added. Mr Ale during his addressal requested Hon'ble Minister of Civil Aviation to support to open flight in Kolkata and Hyderabad by Nepal Airlines to boost Nepal tourism.



Shri Nakap Nalo, Hon'ble Minister of Civil Aviation, Govt. of Arunachal Pradesh begin his addressal at Ministerial Plenary session by highlighting the tremendous potential in Arunachal Pradesh for remote area air connectivity for steering all around developmental activities. He thanked Shri Narendra Modi Ji, Prime Minister of India and Shri Jyotiraditya M. Scindia, Union Minister of Civil Aviation for taking several initiatives to develop aviation infrastructure at various location in the North eastern region to improve air connectivity.

Shri Dushyant Chautala, Deputy Chief Minister of Haryana informed Government of India and various states governments have focused to increase the MRO facilities, FTOs and more to take ahead the aero defence sector. Shri Chautala invited the gathering at the ministerial plenary to visit Hissar in Haryana, where a new aviation hub which is spread over 7300 acres of land is coming up. There also will be a dedicated aviation hub on 4000 acres and with the help of Government of India and NIDC, a manufacturing cluster on +3000 acres, he added. Shri Chautala also said that Haryana as a state is full of opportunities. Today, 40% of total manufacturing of automotive products takes place in Haryana, running four training schools, multiple MROs and having the only sky diving facility in the country, Deputy Chief Minister of Haryana further elaborated. He also informed that within a couple of months, Haryana state government is launching a new aero defence policy for local and foreign manufacturers to invest in the state. Furthermore, about 26 acres of land in Gurgaon, Haryana has been diverted to Civil Aviation Department to transform it into India's biggest Helicopter hub right next to Indra Gandhi International Airport, said Shri Chautala.



Dr. Tamilisai Soundararajan, Governor of Telangana, also current Lieutenant Governor of Puducherry speaking at a Ministerial Plenary session thanked the Minister of Civil Aviation Jyotiraditya Madhavrao Scindia for inviting her on a direct flight from Hyderabad to Puducherry which resumed after 3 years, which she claimed to be a huge time saver. Dr. Tamilisai Soundararajan felt elated to know that 14% of Indian pilot population is women, which is the highest across the world. She encouraged the participation of women in the civil aviation sector and urged more women to take active part. Air travel has fast moved from serving comfort to serving quick connectivity with comfort claimed Dr. Soundararajan, while addressing the gathering at the Wings India 2022. Recalling the

efforts of the aviation industry and its professionals in enabling transport of critical supplies like medicines, vaccines, PPEs, ventilators, and other medical supplies Dr. Soundararajan, thanked the industry in helping the country move forward. Stating that 11% of the population of the state of Telangana are tribals, Dr. Soundararajan, asserted that drones are an essential transport medium to deliver medicines to the remote population. At the end, Smt Usha Padhee provided vote of thanks and conveyed gratitude to Government of Telangana and all other stakeholders who made the event successful.

Global CEOs Forum

Global CEOs forum witnessed the eminent CEOs of airlines, airports, suppliers, investors from across the world, discussing the global outlook, key trends, and synergy between the Indian and global aviation markets.



Chaired by
Shri Jyotiraditya M Scindia

Hon'ble Minister of Civil Aviation Government of India

Airlines' Perspective

Mr Ajay Singh, Chairman and MD, SpiceJet

- ✈ Gradual rise in prices of oil is the key concern for airlines
- ✈ Support is requested from the Hon'ble Minister for excise duty exemption for the airlines



Mr Ronojoy Dutta, Director and CEO, IndiGo

- ✈ Airlines are struggling with high costs as oil's price has touched \$120 a barrel
- ✈ Paying high excise taxes and State ATF is tripling the burden for the airlines

Mr Vinay Dube, Founder and CEO, Akasa Air

Acknowledged the support received from the Ministry of Civil Aviation to be able to launch the new airline – Akasa Air.



Mr Vinod Kannan, CEO, Vistara

With expansion and increase investment in wide body operations and long-haul operations, the impact on fuel will magnify therefore sustainability is going to be important for us in future.

Mr Sunil Bhaskaran, CEO & MD, AirAsia India

Requesting support on fuel cost which would be a direct help in airlines' operations



Mr Vineet Sood, CEO, Alliance Air

Operating on RCS routes and airfields that are not supported by the landing systems are some constraints on utilization of aircraft, hence unable to utilize the space beyond the daytime

Mr Alope Singh, CEO, Air India Express

Moving into the post-pandemic landscape, policy support would be needed, ranging from infrastructure to market access rights



Airport Operators' Perspective

Mr Hari K Marar, MD and CEO, Bengaluru Airport

- ✈ Physical capacity expansion is simply not enough and needs to expand in multiple different ways which include ATC officers, Custom officers, Immigration, CISF in a large number to cater to growing size of Airports in India, as the number of new airports are being added
- ✈ Establishment of airports on the outskirts of the cities which at present are connected with one single road is a big business continuity risk hence requires state governments support in establishing multi-model connectivity to the airports to enable seamless movement of people



Mr SG Kishore, CEO, Hyderabad International Airport

- ✈ Considering the pro-activeness of the Ministry, the MROs are picking up in India. Hyderabad city has become a hub of MROs. Currently, Assistant Director of DGCA is in Hyderabad, the proposals and approvals from DGCA have to go to Chennai which takes a lot of time. Hence, requested the Director level DGCA to address it.
- ✈ Considering development of new airports and also privatization of smaller airports, it is important that air charges are kept at minimal level.
- ✈ For optimal utilization of terminal space, there is a proposal to mix domestic arrival and departing passengers which is a global practice to reduce burden on the airline and passengers, hence, it is requested that it is taken into consideration.

Mr Christoph Schnellmann, CEO, Noida International Airport

- ✈ Cost recovery mechanism in the Greenfield airport policy.
- ✈ Currently, the burden of cost recovery of services such as air navigation services, custom and others are placed fully on the airport operator which will be passed on to airlines and passengers, hence, requested the ministry to review it



Mr Rajeev Kumar Jain, CEO Adani Airports, Adani Groups

- ✈ Airport service quality depends not only on airport operator, and airlines but also on certain regulatory agencies at the airport.
- ✈ National civil aviation policy also contemplates that there should be some service level agreement with sovereign regulatory bodies
- ✈ Separate regulatory and appellate body for airports that could expedite and clarify things in the long run.

Aircraft Manufacturers Perspective

Mr Salil Gupte, President, Boeing India: Stressed on Policy standpoints

- ✈ Potential for manufacturing in India as relates to leveraging commercial and defence synergy
- ✈ Export policy from a standpoint of manufacturing of physical products as well as export of services
- ✈ MRO, training, supply chain, backend engineering services, frontend customer services, all of such services are export opportunities for Indian Civil Aviation Industry.



Mr Juhairul Marzuk, Vice President Institutional Relations, Asia Pacific, Embraer

- ✈ Highlighted Embraer's role in supporting RCS Udan and offering. Embraer's role in connecting tier 1 and tier 2 cities and as a constructive partner in policymaking process, thus Embraer's expertise in data points will contribute in supporting the policy side

Mr William L. Blair, VP and Chief Executive, Lockheed Martin India

- ✈ It would be helpful if the policy change is implemented in terms of driving in unleashing the market for Helicopters
- ✈ Alongside working with DGCA and supporting Pawan Hans, we also to request to assist in the pace of induction of helicopters.



Engine Manufacturers Perspective

Mr Kishore Jayaraman, President, Rolls Royce, India, and South Asia

Looking forward to the Indian sector taking to wide-body aircraft



Mr Mark Cryan, VP Sales, Pratt and Whitney

Indian Airlines have taken the lead from an Environmental perspective while the economics of the aircraft is another reason aviation why aviation growth is so rapid. Partnering together with Airbus, Pratt and Whitney has extremely efficient aircraft that allows airlines to offer prices to sustainable customers in India

Ms Ashmita Sethi, Co-chair, Civil Aviation Committee, FICCI & President and Country Head, Pratt and Whitney

Highlighted the missing Chapter 84 which covers Engine Parts and Modules, imperative for MRO, labor, and requirements to change defective parts



Cargo Perspective



Ms Tulsi Mirchandaney, CEO, Blue Dart Aviation

- ✈ Pledged as an airline to commit to Zero Net fuel by 2050.
- ✈ There are natural resources in the country and Blue Dart is working in a joint venture with Indian Oil by utilizing the natural resources available in Pune, thus, it is an opportunity for India. It is requested that the Ministry looks into it to ramp this up. This support will help us and give us a way forward in terms of meeting the target that we have set for ourselves.

Mr Matthew Davies, VP (India) Operations, FedEx Express Requesting Government support in:

- ✈ Dedicated Express Terminal as a part of Airport Masterplan
- ✈ Dedicated landing slots and parking bays close to the Express terminals
- ✈ To support the process of export and import to make it easier for companies to export their products and services which will make India far more competitive

Aircraft Leasing Perspective

Mr Vishok Mansingh, Director, Vman Aero Services LLP

- ✈ Transaction have been done from the gift city for the helicopter. The helicopter has been leased to an Indian operator with an Indian tax and legal consultancy. In addition to this, leasing of two ATRs has also taken place. Currently, working with Boeing 737 and a start-up airline.
- ✈ Challenges: First, there is no clear regulation on aircraft transfer within India. Second, DGCA regulations need to be aligned with that more transaction can be done within India transfer.
- ✈ Just like Airline, Cargo and MRO, if a working group can be availed to leasing companies it can solve many issues
- ✈ Financial institutes and banks are not ready to fund an asset in the leasing company. We have got financial institutions outside India, which are ready to fund and also believe in our business plan but only on the condition that the ownership of the aircraft has to be kept outside India. Hence, a push requested from Minster of Civil Aviation to at least make Banks consider industry's proposal of financing Aircraft and helicopter asset which is a very safe investment for the banks.
- ✈ Also seeking support from the ministry on the financing issues and on the regulation parts to move it very fast to meet up the small aircraft regional connectivity scheme requirement



Mr Alok Anand, Chairman & CEO, Acumen Aviation

- ✈ Along with the highly successful RCS UDAN scheme, if it can be connected to aircraft leasing through IFSC Model because government subsidizing airlines and several other airlines looking for assets in that space.

Business Aviation Perspective

Ms Kanika Tekriwal, Co-Chair, FICCI General Aviation Taskforce & Co-Founder & CEO, JetSetGo Aviation Services Pvt. Ltd. The challenge for Business Aviation is that there is no differentiation between a commercial airline and general aviation, this makes general aviation non-viable in India, thus, hindering the sector's growth and progress. Therefore, it is time that separate regulations are in place to operate private jets freely



MRO Perspective



Mr D Anand Bhaskar, MD & CEO, Air Works

- ✈ Air Works support all four segments which include- rotary wings, general aviation, commercial and Defense. Need a Business Continuity Plan in the sector involving all the stakeholders.
- ✈ On GST and Customs, the clarificatory note is requested from Ministry to get an idea on taxes levied on different segments
- ✈ In future, as the defence sector is expanding, the issue of lack of qualified manpower especially technical manpower will be the challenge

Drones Perspective

Mr Ankit Mehta, CEO, IdeaForge

- ✈ IdeaForge has come up with a PLI scheme for the Drone industry, within a year of launching a scheme, it is expected to see revenue jump at least 5 to 7 times, thus this segment may run out of the funds for the scheme, hence ministry is requested to consider enhancing the scheme.
- ✈ Certain policy-related matters which are not yet fixed with respect to the exports control in India
- ✈ Drones today need an industrial license to be manufactured in India



State Government's Perspective



Capt. Ajay Chauhan, Director, Civil Aviation and CEO GUJSAIL, Government of Gujarat

A lot of states are coming up with their own state governed policies and incentives, schemes and taxation benefits, if the industry players could interact with states at state-level with different states, it will benefit sector at large.

Shri K R Jyothylal, Principal Secretary Aviation, Govt. of Kerala

Setting up fifth international airport at Sabarimala, Kerala with a huge investment, thus, it is requested that there should be an open sky policy for foreign carriers to land within the bilaterals





Shri Jyotiraditya M. Scindia, Hon'ble Minister of Civil Aviation, Government of India

Closing Remarks:

- ✈ Reassured all industry players that their concerns have been heard and will surely be addressed. This ministry acts as a facilitator, the goal is to make things simpler, efficient and allow you to do what is best.
- ✈ We have set up eight advisory groups under my chairmanship, which cover the entire aviation ecosystem
- ✈ Civil Aviation is ready to take over as the backbone of growth in India in years to come

Mr Videh Jaipurkar, Co-Chair of FICCI Aviation Committee & CEO Delhi International Airport

Thanked the Minister, Senior officials from the Ministry, Airports Authority of India and FICCI and CEOs from the industry.

Key takeaways:

- ✈ It has become necessary to find a way to deal with rising fuel cost
- ✈ Some of the RCS routes and airfields not supported by Instrumental Landing System (ILS) limits the operations as well as utilization of space beyond the daytime
- ✈ Trained personnel required as ATC officers, Custom officers, Immigration, CISF to cater to the needs of growing size of Airports in India and increase in number of new airports
- ✈ State governments support in establishing multi-model connectivity to the airports to enable seamless movement of people
- ✈ For optimal utilization of terminal space, mix domestic arrival and departing passengers
- ✈ Need for separate regulatory and appellate body for airports
- ✈ Indian sector taking to wide-body aircraft
- ✈ Looking forward to the aviation sector bringing in wide-body aircraft
- ✈ Request from Minister of Civil Aviation to at least make Banks consider the proposal of financing Aircraft and helicopter asset
- ✈ Need for separate regulations for commercial airline and general aviation
- ✈ Drones today need an industrial license to be manufactured in India
- ✈ Industry leaders are requested interact with state government for state level activities and joint ventures



Panel Discussion 4

Revival Of Aviation - Ascending Through The Clouds Of Optimism: Airlines Perspective

The session discussed how with the right mix of policy support, creation of air bubbles, emphasis on community health, adequate safety measures & Sop's, mitigating the fear perception, best practices and astute business acumen, the aviation sector is all set to walk the path of resurgence and touch new heights.



Chaired by

Shri Satyendra Kumar Mishra

Joint Secretary, Ministry of Civil aviation Government of India

Moderator:

Ms. Shereen Bhan, Managing Editor, CNBC-TV18

Panelists:

- ✈ **Mr. Ajay Singh**, Chairman and MD, SpiceJet
- ✈ **Mr. Ronjoy Dutta**, Director and CEO, Indigo
- ✈ **Mr. Mohammad Sarhan**, VP, India & Nepal, Emirates Airline
- ✈ **Mr. Vinod Kannan**, CEO, Vistara
- ✈ **Mr. Vinay Dube**, Founder and CEO, Akasa Air
- ✈ **Mr. Sunil Bhaskaran**, CEO & MD, AirAsia India Ltd.
- ✈ **Mr. Murray Smyth**, Global CEO, WAISL Limited
- ✈ **Mr. Mark Cryan**, VP Customer Business, Middle East & Asia, Pratt and Whitney



Shri Satyendra Kumar Mishra, Joint Secretary, Ministry of Civil aviation

- ✈ Over the period taxation has reduced. Even during the high taxation period airlines were making profit.
- ✈ During the high fuel costs also, airlines endured. During the pandemic also, airlines survived. Hence, we are hopeful that this sector is quite resilient, and it is moving towards a big growth.
- ✈ India is a big market and Government is aware of all the constraints and is taking with other ministries regarding the excise part and infrastructure bottlenecks.
- ✈ Regarding carbon reduction part, airlines are aware that the huge cost is going to be imposed on them.
- ✈ Not only sustainable fuels, but airlines must think of the efficiency of the airplane itself to achieve ICAO's goal of 2% of fuel efficiency of carbon reduction should come from efficient airline. Thus, airlines should not be caught unaware of what is going to come on next 4-5 years and should move towards more comprehensive sustainable aviation.
- ✈ Government is facilitating all kinds of support to take the sector forward and attain solutions to the limitations.

Ms Shereen Bhan, Managing Editor, CNBC-TV18

The airlines CEO panel moderated by Ms. Shereen Bhan brought together all Indian carriers to chart out the flightpath for the sector.

- ✈ While all CEO's expressed concerns about the short-term prospects with ATF prices surging by over 50% from the start of 2022, they are confident about the sectors long term prospects.
- ✈ The need to upgrade existing infrastructure & builds out new infrastructure with a sense of urgency is one of the clear demands, along with a reduction in taxes.
- ✈ Leaders are unanimous about the headroom for growth and a pickup in demand but warned about "profit-less" growth if taxes remain high and fares don't keep pace with high costs.



Mr Ronojoy Dutta, Director and CEO, Indigo

- ✈ Indirect tax of 21% imposed on airlines is crippling the industry
- ✈ ATF needs to be brought under the ambit of GST
- ✈ Federal excise duty tax on aviation fuel needs to be reduced from 11% to 5%
- ✈ The sector has a huge potential and very much capable of writing a growth story.

Mr Ajay Singh, Chairman and MD, SpiceJet

- ✈ No Country in the world does not include ATF under a central taxation like GST. It is not only bringing ATF under GST but also the 11% excise duty, which was hiked at a time when oil prices went down. Now, oil prices are at a record and excise duty is not coming down.
- ✈ This sector has a huge potential, but we need to keep the cost base right. It is not only the fuel, but also suddenly imposed IGST on parts that are repaired overseas and GST that is being charged.
- ✈ It is counterintuitive that a Country, which aspires to be a global aviation leader should handicap its airlines so strongly by charging input tax and not giving any input tax credit. For most Countries around the world, it is unbelievable.
- ✈ There was little assistance provided to the aviation sector during Covid along with high taxation, low yields and shut down of the sector. We need to be very cognizant of the fact that the aviation sector has suffered huge losses and a chronically ill industry.
- ✈ We have large amounts of accumulated credit and there is a pressure on us to pay the owed amount at earliest. Banking sector has also reduced the credit limits with no money lending and future credits.
- ✈ ECLGS money is helpful but in the larger scheme of things it is quite irrelevant. So, it is high time for us to fix the basics.



Mr Mohammad Sarhan, VP, India & Nepal, Emirates Airline

- ✈ Very early on during the pandemic we realized that agility was key to adapt quickly to a constantly changing business environment. During the initial stages of the pandemic our passenger services were severely disrupted but we scaled up our cargo services to keep global supply chains up and running and have essential supplies flowing smoothly.
- ✈ During the crucial early phases of recovery, establishing safe travel bubbles between countries proved to be a successful strategy to open specific corridors between countries for essential travel.
- ✈ India and the UAE have a close working partnership and with the recently signed Comprehensive Economic Partnership Agreement (CEPA) the scope for bilateral trade and market access has been much enhanced.
- ✈ We stand ready to further facilitate these connections and remain committed to strengthening our partnership with the country, and to supporting its trade and tourism industries safely and sustainably.



Mr Vinod Kannan, CEO, Vistara

- ✈ We hope that the ATF excise duty reduction and GST inclusion will be worked upon and materialize soon.
- ✈ Fundamentally, India remains a growing market and there is tremendous potential in the medium to long term. We would need to overcome the significant short-term challenges, but it is an industry poised for growth and profitability.
- ✈ There are cost levers and potential for further refinement and optimization that all airlines will work on, with other players in the ecosystem.

- ✈ While airlines have had a rough 2 years and especially in India, there is significant cost pressure due to depreciating rupee and high fuel price, we are hopeful of a recovery and profitable growth for the industry in times to come

Mr Vinay Dube, Founder and CEO, Akasa Air

- ✈ Before Covid, there were about 650 narrowbodies flying in India. Twenty years from now, there will be 1,500-2,000 narrowbodies flying: This was our strong belief in the future of the Indian economy and Indian aviation, and we wanted to be an integral part of this future.
- ✈ I don't think aviation is a cash-guzzling business. My view is if done correctly, airlines can have a sustained level of profitability.
- ✈ There is no individual item that can change the trajectory of airline profitability – airlines must reinvent themselves everywhere. There is no space for complacency in this business, we need to be constantly reimagining ourselves.
- ✈ Technology is one area where I believe India is not yet at the level of the best airlines in the Western world.



Mr Sunil Bhaskaran, CEO & MD, AirAsia India Ltd.

- ✈ Pre Covid there were about 140 million segments sold. First year after Covid it was 57 million. This year it is likely to be 84 million. Most of us in the sector thinks there will be a 157 million good forward next year, which is higher than the pre covid and we are hoping that by May month we will come to the same levels. It is about 85% higher than this year with an 8.5% growth. In terms of growth, it is good, but we need to get good in terms of cost, consumption, and rate too.
- ✈ Issue of 21% indirect tax need to be taken care of.

- ✈ Demand is very good, Indian aviation is extremely efficient in terms of efficiency numbers. but Indian aviation is highly supply constraint.
- ✈ We are really straddled by the high costs of fuels and the high indirect costs.
- ✈ Indian aviation does not require high capital infusion. It requires small cash to act as fixed cost element is extremely small as we are being supported by the ecosystem of OEMs to get going.



Mr Murray Smyth, Global CEO, WAISL Limited

- ✈ All airlines want growth through more passengers and happier passengers. Digital and IT services in airports help deliver this growth and improved customer experiences to airlines and their passengers e.g., Improve the speed and volume of passengers from kerb to gate (with more self-service, biometrics and DigiYatra implementation and the latest in passenger and cabin bag scanning systems).
- ✈ Improve on time departures and faster aircraft turnaround times (with resource management and airport collaborative decision making).
- ✈ Create more engaging retail experiences (with flight and market segmentation).

- ✈ Digital and IT services, combined with the Common Use Airport model adopted in India and the continued development of airport capacity will support the double-digit air travel growth that is planned.

Mr Mark Cryan, VP Customer Business, Middle East & Asia, Pratt and Whitney

- ✈ Taxation on the Aviation Industry is a break on the Indian Economy. So, it is best release brakes and let the Aviation Sector thrive and the Indian Economy will thrive as the airline industry success correlates with the economic success of the country.
- ✈ We see the Indian market growth with tremendous opportunities in long term. It is a very competitive place for all the OEMs and the market is big enough to give all the OEMs significant piece of the business going forward.
- ✈ In the future we are looking at evolving technologies including electronic hybrid technologies and hydrogen fuel technologies.
- ✈ We are very excited to be a part of Indian Aviation Growth Story.



Key takeaways:

- ✈ Not only sustainable fuels, but airlines must think of the efficiency of the airplane itself to achieve ICAO's goal of 2% of fuel efficiency of carbon reduction should come from efficient airline. Thus, airlines should not be caught unaware of what is going to come on next 4-5 years and should move towards more comprehensive sustainable aviation.
- ✈ Concerns about the short-term prospects with ATF prices surging by over 50% from the start of 2022.
- ✈ The need to upgrade existing infrastructure & builds out new infrastructure with a sense of urgency is one of the clear demands, along with a reduction in taxes.
- ✈ Leaders are unanimous about the headroom for growth and a pickup in demand but warned about “profit-less” growth if taxes remain high and fares don't keep pace with high costs.
- ✈ ECLGS money is helpful but in the larger scheme of things it is quite irrelevant. So, it is high time for us to fix the basics.
- ✈ Indirect tax of 21% imposed on airlines is crippling the industry
- ✈ ATF needs to be brought under the ambit of GST
- ✈ Federal excise duty tax on aviation fuel needs to be reduced from 11% to 5%
- ✈ Technology is one area where India is not yet at the level of the best airlines in the Western world.
- ✈ Sector is straddled by the high costs of fuels.
- ✈ Improve on time departures and faster aircraft turnaround times (with resource management and airport collaborative decision making).
- ✈ Create more engaging retail experiences (with flight and market segmentation).
- ✈ Digital and IT services, combined with the Common Use Airport model adopted in India and the continued development of airport capacity will support the double-digit air travel growth that is planned.
- ✈ In the future, Industry is looking at evolving technologies including electronic hybrid technologies and hydrogen fuel technologies.

India-US Roundtable with AMCHAM

A roundtable between Hon'ble Minister of Civil Aviation Shri Jyotiraditya M. Scindia and his senior leadership team with members of US-India Aviation Cooperation Program and AMCHAM was key highlight during WINGS India. US Counsel General Joel Reifman from Hyderabad Consulate and officials from US Department of State, TDA, FAA and ACP and AMCHAM members from US industry were present for this roundtable and open discussions. US representatives briefed their programs in India, including the latest studies done with support of collaboration between Industry and Government, for example the latest ANS modernization roadmap between AAI and Boeing, and planned Executive Development Program and Integrated Safety Management System. US companies continue to introduce best practices, technology advancement and new investment in India in Civil Aviation Sector supporting gainful employment in both the nations. Hon'ble Minister of Civil Aviation Shri Jyotiraditya M. Scindia acknowledged the efforts and cooperation between the two countries and industry. He emphasized that with opening of international travel, investments in infrastructure and continuous growth in domestic aviation passenger numbers, this group represent the complete ecosystem to assist and realize coming opportunities. The meeting ended with a reminder from Minister to re-group in near future with his colleagues and look at the outcome-oriented projects for the benefit of civil aviation.

Following were the other attendees from US side.

S. No.	Public & Corporate Member	Attendee's name	Designation
1	Federal Aviation Administration (FAA)	Mr. Chris Carter Mr. Devinder Arora	Director – Asia Pacific Civil Aviation Specialist – South Asia
2.	U.S. Trade and Development Agency (USTDA)	Ms. Mehnaz Ansari	Sr. Regional Representative – South Asia
3	U.S. Commercial Service - U.S. Department of Commerce	Mr. Joel Reifman Mr. Andrew Edlefsen	Consul General, U.S. Consulate, Hyderabad Principal Commercial Officer
4	U.S. Department of State	Mr. Philip Matt Ingeneri Mr. DJ Rao	ACP Co-chair (Government) & Economic Growth Unit Chief – EEST Senior Macro Economist and Civil Aviation Specialist

S. No.	Public & Corporate Member	Attendee's name	Designation
5	ANRA Technologies	Mr. Amit Ganjoo Mr. Sanuj Mittal	Founder & CEO Business Strategy and Growth
6	Boeing India	Mr. Salil Anil Gupte Mr. Tejaswi Narasimhan	President Director Sales – India & Southeast Asia
8	FedEx Express	Mr. Suvendu Choudhury Mr. Matt Davies	Managing Director – International Ops. Vice President Sales, MEISA
9	Lockheed Martin India	Mr. William L. Blair Mr. Kiran Dambala Mr. David Sale Mr. Parag Sehgal	Vice President & Chief Executive COO, LM-Tata JV, Hyderabad Rotary-Wing Lead INDOPAC Director, Rotary & Mission Systems
10	L3Harris India	Mr. Amitabh Ghosal Mr. Sujoy Ghosh Mr. Subha Saha	Vice President – Operations Managing Director – Harris Communications Systems (I) (P) (L) – Subsidiary of L3Harris Sales Director
11	Raytheon Technologies	Mr. Samit Ray	Regional Director South Asia Government Affairs
12	Smiths Detection India	Mr. Vikrant Trilokekar Mr. Arun Jyoti	Managing Director Vice President – Corporate Affairs (Smiths Group)
13	Textron/Bell India	Wg. Cdr. Shriram Ghatpande	Business Development Director

S. No.	Public & Corporate Member	Attendee's name	Designation
14	United Technologies / P&W	Ms. Ashmita Sethi Mr. Amit Pathak	Co-chair, Civil Aviation Committee, FICCI & President & Country Head – P&W and UTC India GM, P&W Customer Training Center
15	Veoci	Mr. Anurag Bhardwaj	Vice President – Sales
16	Astrophysics India	Mr. Siddharth Kundu Ms. Eishita Koley	Director APAC
17	GE Aviation	Mr. Vikram Rai Mr. Vivek Verma	Country Head Sr. Sales Director
18	ACP	Mr. Sandeep Bahl	Executive Program Director
19	AmCham	Ms. Ranjana Khanna Ms. Udaya Arun	Director General CEO, AMCHAM Director – Aerospace & Defense, AMCHAM

Panel Discussion 5

Future Of Travel: Airport Perspective

This session discussed the current level of technology adoption at different airports and how the trend is likely to evolve in the future. We will also discuss how this trend is impact airport's revenue potential and passenger experience.



Chaired by

Shri Sanjeev Kumar IAS
Chairman, Airport Authority of India

Co-Chair: Smt. Rubina Ali, Joint Secretary, Ministry of Civil Aviation, Government of India

Moderator:

Mr. Jagannarayan Padmanabhan, Director at CRISIL Limited

Panelists:

- ✈ **Shri S. Suhas**, IAS, MD, CIAL
- ✈ **Mr. Ali Mohammed Rajab**, Executive Vice President of Economic Policies and International Cooperation, General Authority of Civil Aviation (GACA)
- ✈ **Mr. Rajeev Kumar Jain**, CEO Adani Airports, Adani Group
- ✈ **Mr. S G K Kishore**, Executive Director South & Chief Innovation Officer, GMR Group

- ✈ **Mr. Hari K Marar**, Managing Director & CEO, Bengaluru Airport
- ✈ **Mr. Ilia Lioutov**, Senior Expert Economics and ESG, ACI Asia-Pacific
- ✈ **Mr. Nicolas Schenk**, CDO, Noida International Airport
- ✈ **Mr. Sumesh Patel**, President-Asia Pacific, SITA

Shri Sanjeev Kumar, IAS, Chairman, Airports Authority of India

- ✈ There is significant potential for growth of Airports in India – we are still under penetrated, and the best is yet to come
- ✈ AAI were the pioneers in Airport development in the country and continue to play a significant role in building out airports in newer locations
- ✈ AAI has taken special care to make the airports more inclusive and provide services to all economic segments/ users of the airport
- ✈ AAI airports have adopted sustainability in a big way – the Airport in Leh is Carbon neutral



Smt Rubina Ali, Joint Secretary, Ministry of Civil Aviation, Government of India

- ✈ Indian Airports have through Four phases of development –
- ✈ Phase 1 - AAI taking the lead in development,
- ✈ Phase2 - Induction of Private partner in development of Airport – Cochin International Airport being a pioneer in this
- ✈ Phase3 – Bidding out of Airports under PPP mode (Brownfield and Green field)
- ✈ Phase 4 – Coexisting and achieving complementarity between the Private and Government owned airports
- ✈ Airports have adopted technology in a meaningful manner and is aiding in better customer experience and bringing in efficiency
- ✈ The Government has facilitated the growth of both Private and Government owned ports and both have learnt from each other's operations



Mr Jagannarayan Padmanabhan, Director at CRISIL Limited (The following key points deliberated as part of the panel discussion by Session Moderator, Mr. Jagannarayan Padmanabhan)

- ✈ Adoption of technology to enhance the customer experience and to make travel as seamless as possible
- ✈ Transition of Airports from standalone Infrastructure Asset to being Airport Cities and getting more inclusive in their operations
- ✈ Promotion of local employment and to showcase regional products and thereby giving more visibility to the local people
- ✈ India is in the cusp of a significant growth and very soon we could see the emergence of regional and National Hubs getting operationalized
- ✈ There has been a positive experience as far as PPP projects are concerned for all the stakeholders and Indian airports rank as one of the best in Infrastructure and service delivery
- ✈ Airports have adopted sustainability in a significant manner and all facets of Airport management adopt this in a significant manner
- ✈ Initiatives like Digi Yatra and the digital platforms are getting significant traction from the Passengers and is seen as a great platform to address passenger grievances and to share their experiences
- ✈ Cochin airport has imbibed sustainability in a big manner and have taken initiatives in Solar power generation/ Green energy, waterways transportation, waste treatment etc.

Shri S. Suhas, IAS, MD, CIAL

- ✈ Airports must contribute to environmental sustainability
- ✈ Airport must focus on cost effectiveness
- ✈ Airport must demonstrate inclusiveness and carry local public together in the growth/success
- ✈ Airport must be a part of the integrated development plan of State/Country



Mr. Ali Mohammed Rajab, Executive Vice President of Economic Policies and International Cooperation, General Authority of Civil Aviation (GACA)



Mr Ali Mohammed Rajab, Executive Vice President of Economic Policies and International Cooperation, General Authority of Civil Aviation (GACA)

Mr. Rajab spoke about the General Authority of Civil Aviation's strategy in line with the objectives of Vision 2030 of Kingdom of Saudi Arabia

- ✈ Saudi Arabia is going to be number one in the region.
- ✈ Increase Passengers to be over 330 million by 2030
- ✈ Increase connectivity to be over 250 destinations by 2030

Mr Rajeev Kumar Jain, CEO Adani Airports, Adani Group

- ✈ International Hubs to be developed in India Airports, Airlines and Govt to come together for this
- ✈ Immense use of technology at airports for ease of travelling, increasing dwell time post SHA to increase non-aero revenues
- ✈ ATF to be brought under GST, till that happens, reduction in VAT at balance states also
- ✈ Airports achieve carbon neutrality



Mr S G K Kishore, Executive Director South & Chief Innovation Officer, GMR Group

- ✈ Introduction of the PPP model for airports has brought in a transformative change in the Indian airport sector, improving everything from infrastructure and processes to service quality and customer experience
- ✈ Airports have moved from being seen as mere transportation facilities towards being engines of economic growth, with major Indian metro PPP airports such as Hyderabad being very good examples of development of 'Airport Cities'

- ✈ Modern Indian airports are also leaders in sustainability space
- ✈ The highly successful Indian model of airport development could now serve as a role model/framework for other countries, especially those from emerging markets to follow.

Mr Hari K Marar, Managing Director & CEO, Bengaluru Airport

Mr. Marar Spoke on the Future of Aviation and Explained the BIAL's Digital Transformation journey Via Passenger Facing - Digital & Physical, Internal processes, Data Analytics and Future technology

- ✈ Passenger and customer facing website and app that will bring online all retail, dining, services, and experiences apart from offering passengers information and convenience at every step of their journey
- ✈ A Biometric Boarding (Travel Pass) system that can cut across all modes of transportation and become the single token for all travel needs in India and abroad in future.
- ✈ The future will be one where multiple transportation technologies will coexist with, complement, and integrate with each other giving passengers a seamless experience with their end-to-end travel.
- ✈ Hyperloop can complement and co-exist with aviation in a way that can deliver significant value to not only the customer, but the overall economy as well.





Mr Ilia Lioutov, Senior Expert Economics and ESG, ACI Asia-Pacific

- ✈ As the impact of COVID-19 has forced airports to accelerate the use of digitalization in passenger journey, they have successfully reduced critical touchpoints to improve confidence, while keeping passengers engaged. The adoption of various technologies is expected to enhance passenger experience and help airports to diversify, improve and expand the range of non-aeronautical revenue generating activities.

- ✈ The issues of sustainability and passenger experience, testifying to the challenges of pursuing multiple goals and tackling several issues in a concurrent manner.
- ✈ Acknowledged a growth outlook and praised the Government of India for pursuing privatization indispensable to the development of airport infrastructure and greenfield airports.
- ✈ As for greenfield airports, India is one of the leaders in developing new airports to accommodate future air travel demand. Such ambitious growth plans require commensurate infrastructure development accompanied with conducive government policies.
- ✈ ACI Asia-Pacific is committed to continue working with the widest range of stakeholders in the aviation ecosystem in ensuring that government policies foster infrastructure development, high airport service quality, digital transformation, and sustainable operations.
- ✈ The airports community represented by ACI will be further advocating for the economic and social benefits delivered by safe, secure, efficient, and sustainable air transport and airports and pursue its activities to meet the United Nations Sustainable Development Goals (UN SDGs) and the 2030 Agenda for Sustainable Development.

Mr Nicolas Schenk, CDO, Noida International Airport

Holistic approach to design of infrastructure (based on ConOps) and airport operations

- ✈ Overall ecosystem / collaborative approach
- ✈ Setting up a destination
- ✈ Pax Experience
- ✈ Seamless Pax journey from start (home) to end > information
- ✈ AOP and Total Airport Management (going beyond collaborative decision-making A-CDM)
- ✈ BIG DATA is essential to increase customer experience, All the stakeholder needs the same situational awareness

How NIA streamline the passenger (and terminal) experience:

- ✈ Bag Drop at metro station and forecourt to allow hands-free movement asap
- ✈ Self Service Options to break peaks and reduce waiting times



- ✈ Minimal walking distances to gate
- ✈ Active queue management to increase throughputs
- ✈ Short taxi routes runway to stand increasing arrival experience
- ✈ Passenger Flow Analytics to optimize resource allocation

Design and operations principle

The one thing frequent flyers hate most, is wasting time (at airports). NIA focus on to provide efficient processes to minimize waiting times (using big data for analytics as well) and reduce walking distances to ensure frequent flyers can minimize the time they need to spend at an airport.



Mr Sumesh Patel, President-Asia Pacific, SITA

- ✈ The pandemic has accelerated the digital transformation to tackle immediate challenges around health, financial viability, and an automated passenger journey. But the benefit extends well into the future for a leaner, more agile industry.
- ✈ There is appetite from private airport operators also to embrace biometric passenger processing technologies and link them to health credentials.
- ✈ Airports, and Airlines today are focusing on touchless and low-touch technologies - to make the journey easier, quicker, and safer with automation and self-service throughout the airport. As well as enabling passengers to arrive at the airport checked and 'ready

to fly', by moving processes off-airport, such as travel authorization, bag drop, mobile check-in, and arrival at the terminal. All these solutions need to be developed as affordable solutions that easily integrate into existing infrastructure.

- ✈ There has been much enthusiasm from the industry over the years to scale up on ACDM and predictive analysis, where much work is still due.
- ✈ Advance Passenger Information and travel booking data (or Passenger Name Record (PNR) as it is also called). Collected from airlines, this data enables the government to carry out additional risk assessments, including passengers travelling from high-risk areas.
- ✈ The aviation industry is in need to be more sustainable through meeting its carbon reduction objectives.

Key takeaways:

- ✈ Adoption of technology to enhance the customer experience and to make travel as seamless as possible.
- ✈ Transition of Airports from standalone Infrastructure Asset to being Airport Cities and getting more inclusive in their operations.
- ✈ Promotion of local employment and to showcase regional products and thereby giving more visibility to the local people.
- ✈ Airports must contribute to environmental sustainability, focus on cost effectiveness, and demonstrate inclusiveness.
- ✈ Airport must be a part of the integrated development plan of State and Country as a whole.
- ✈ Airports, Airlines and Govt to come together to develop International Hubs in India.
- ✈ ATF to be brought under GST, till that happens, reduction in VAT at balance states also.
- ✈ There has been much enthusiasm from the industry over the years to scale up on ACDM and predictive analysis, where much work is still due.
- ✈ The aviation industry is in need to be more sustainable through meeting its carbon reduction objectives.

Panel Discussion 6

Aero-manufacturing and MRO: A Segment in Upheaval

The session discusses strategic plans for any unprecedented crisis in the future, creating opportunities for India to be self-sufficient in providing the training required by MRO. The session focuses on the right steps in creating India a Manufacturing and MRO hub to reduce the overall cost of the operators and thus having a ripple effect on the passengers and fulfilling the vision of UDAN.



Moderator:

Mr. Bharat Malkani, President, MRO Association of India

Panelists:

- ✈ **Shri Praveen PA**, Director- Aerospace & Defense; Director- BFSI at Govt of Telangana
- ✈ **Shri Dibyendu Maiti**, CEO, HAL
- ✈ **Mr. Amit Pathak**, General Manager India Training Center Pratt Whitney
- ✈ **Mr. Laurie Alder**, Head of Customer Services, Airbus India & South Asia
- ✈ **Mr. Salil Gupte**, President, Boeing India
- ✈ **Mr. D. Anand Bhaskar**, MD & CEO, Airworks



Mr Bharat Malkani, President MRO Association of India

Civil Aviation in India has grown rapidly over the last few years and has large potential to be an aviation hub of the world. Despite the aviation industry being severely affected by the COVID-19 pandemic, India has become the 3rd largest civil aviation market in terms of domestic traffic. The present civil aviation fleet (as of Jan '22) stands at 705 aircraft and is expected to quadruple to close to 2400 aircraft over the next twenty years. The country-based Airlines have placed some of the biggest orders to the Aircraft OEMs like Boeing, Airbus, Embraer, and DE Havilland (formerly Bombardier). The government along with the stakeholders is striving towards the

growth of the Aviation ecosystem in the country which includes Airlines, Airports, MRO, and Manufacturing. The MRO spend is expected to grow by more than 4 times to reach around USD 4 billion in the next 3 to 5 years. While many companies have expressed interest in setting up operations in the MRO sector with the growth of demand no new investments have been coming for the past few years. The reason for the above lack of investment was asked to the panelists and these are the suggestions from the same. Each of these leaders of their organizations represents the biggest aviation companies either in the form of an OEM's or MROs in India and/or globally.

Shri Praveen PA, Director- Aerospace & Defense; Director- BFSI at Govt of Telangana

- ✈ MROs incur huge initial capex expenditure, and these sunk costs were already made in other regions/ countries. They are however now seeing the opportunities in setting up MRO shops in India given the growth projections for the region and progressive reduction in VAT and other levies that makes it competitive for e.g., Government of Telangana is currently actively discussing with two leading engine OEMs who have interest in setting up Engine MROs in India.
- ✈ The availability of dedicated aerospace parks near the international airport, large pool of trained and certified manpower and a robust supply base comprising of over 1000 precision engineering industries in and around the city makes Hyderabad a very ideal MRO hub for OEMs and operators.





Shri Dibyendu Maiti, CEO, HAL

- ✈ The Defence Capabilities can be upgraded/ augmented with minimum capital Investment like specific tools and equipment's, certification skill sets etc.to take up the requirements in Civil Sector.
- ✈ The Skill sets, Technological capabilities, Manufacturing & MRO Infrastructure, OEM relationship etc. can be cross utilized to carryout repair and manufacturing of civil parts and platforms in collaboration with OEMs/ Customers/Third party MRO players.

- ✈ Policy Framework on Areas of Convergence between Defence & Civil
- ✈ Unified Regulatory Framework for Identified areas of Convergence project.
- ✈ Policy making it mandatory for new aircraft purchases, leasing in scheduled and general aviation to perform 100% MRO in India with Indian MRO in next 5 years.
- ✈ Develop an Incentive policy for OEMs to bring in Investments in collaboration with DPSUs/ Private Sectors with wide experience in Aeronautics/ Aviation domain to establish Component MRO Shops on the country specifically for components sent abroad for Repair.
- ✈ MRO of Civil airframe platform used by Defence Services to be done in the country under Civil-military convergence project.
- ✈ Policy towards utilization of Full range of capabilities, skill sets and infrastructure existing in DPSUs/ Private Sectors for Manufacturing/ MRO of Components etc.
- ✈ Parts manufacturing for OEMs Like Airbus & Boeing
- ✈ Establishment of a Parts Manufacturing Association in the country under the Gambit of Regulator (DGCA)
- ✈ Policy Framework for Creation of Integrated MRO Hub

Mr Amit Pathak, General Manager India Training Center Pratt Whitney

- ✈ We do believe not just aviation, but the entire Indian aerospace ecosystem stands an inflexion point today – a point from which it can leapfrog to become a major global competitor
- ✈ The government needs to incentivize OEMs to invest capital, through tax breaks, policies, and even strategic investments – and there are lessons to be learnt from other Asian countries on this.
- ✈ **Ramping up MRO**

In addition to GST reduction from 18% to 5%, and further input tax credit provision. As global engine OEM we also want to be closer to our customers – Incentives like a 10-year tax holiday, like Singapore, will provide tangible benefits to investors. It will motivate domestic and foreign players to setup MRO bases in India. Finally, a single window clearance for MRO in customs will enable MRO firms and OEMs to deliver the efficiency and readiness that our customer's fleets need.

- ✈ **OEMs are ready to partner** We intend to harness more of the talent inherent India, growing our business while investing in the local and national Indian economy in our efforts. We forecast a very strong ramp of production in all segments of our business, and there remains a great opportunity for Indian engineering support to join us in this very bright future.



Mr Laurie Alder, Head of Customer Services, Airbus India & South Asia



- ✈ India's growth story is here to stay. India emerged as the fastest growing aviation market in the last decade for G20 countries and is at the top of the world in aviation growth.
- ✈ Whilst the growth has primarily been driven by a strong low-cost carrier fueled domestic traffic, international traffic has lagged. Indian carriers captured only 6% of the total long-haul traffic growth in the last decade and captured only 14% of the long-haul traffic to/from India in 2019, and 74% of passengers are taking connecting flights for long-haul travel from India.
- ✈ The primary reason that Indian carrier lagged in controlling the long-haul market from India is due to a small WB fleet. While the single aisle fleet in India has grown almost six times since 2002, the wide-body fleet has remained almost stagnant.
- ✈ So, a massive opportunity exists for Indian carriers to rebalance the share in the long-haul market. The home potential is currently untapped, but obviously cannot remain so, and we are at the cusp of this happening.
- ✈ India will continue to be the world leader in growth at 6.2% for the next 20 years (world average is 3.9% for 20 years). This means that India will need ~2,210 new gen aircraft with 25% lower carbon footprint for Indian carriers over 2021-2040.
- ✈ As an aircraft OEM, what we want most of all is that our airline customers have access to the best cost and time efficient MROs to minimize their operational costs and maximize their aircraft availability hours. This is obviously the key to where the potential lies for the MRO growth in India.
- ✈ To encourage this to be done on shore, everybody here is aware of the historical fiscal barriers for the MRO industry, and everyone is aware of and thankful for the great efforts being made by the government to ease these barriers, and whilst there is still more to be done, hopefully the positive momentum will continue.
- ✈ Airbus supports all the MROs by providing the knowledge base, parts, tools, expertise, digital services, and innovative solutions such as drone inspections, all which an MRO can use to be a world class facility.
- ✈ From our knowledge of how MROs around the world operate, we can also provide our consulting services to do any gap analysis in terms of processes, checks and a variety of possibilities to enhance efficiency and best industry practices.
- ✈ Airbus is also indirectly supporting both the airlines and the MROs by participating in the skills development pipeline for the next generation of aircraft maintenance engineers.
- ✈ In addition to the approved type training performed since 2007 in our Maintenance Training Facility in Bengaluru, we have already started working with several educational institutions by providing state of the art basic maintenance courseware in our "ACT for academy suite" and assisting with the instruction to the highest Airbus standards.
- ✈ The topmost priority of all our aviation industry ecosystem, MROs included, remains of course safety, and we all together have the obligation to develop strategies which are not just based on immediate returns but on long term sustenance.
- ✈ The opportunities are there for Indian MROs to exponentially grow for current aircraft types operated in the region, and to prepare for the arrival of new aircraft types like A350 and A220 too. Let's work together to convert these opportunities into realities.

Mr Salil Gupte, President, Boeing India

- ✈ The time is right for India's growth in component MRO – the business cases will need to close
- ✈ India's economics on this work will need to be far superior to existing facilities in the region to pull this work back to India
- ✈ The ideal time to ramp up will be during the development of a new airplane, when the component OEMs make decisions about where new repair facilities will be located for that model



- ✈ Over the past 2 years, India has proven it can, after recent tax changes made by the GoI, deliver MRO at world-leading cost and quality for both commercial and defense



Mr D. Anand Bhaskar, MD & CEO, Air Works

- ✈ Global OEMs are completely aware and realize the potential of the India market for ensuring sales of their aircraft.
- ✈ They also accepted that India Mfg. Quality standards have substantially improved over the years and the country is being slowly tested with smaller & complex orders as part of local sourcing initiatives.
- ✈ At the same time, while they seem open & willing to explore investing in the India market for the long run, the local

representatives remain non-committal about the amounts of investment / areas of investment / its timing as well as its scale & scope. The OEM India representatives mentioned issues such as veracity of business case, political stability, market, labour & skill set availability at a point in time, as likely handicaps for creating a positive/ negative Business case, as also the existence of or discovery of business opportunities – in which case, even business cases may be ignored by their management/ global teams.

- ✈ There was almost a clear concurrence that without significant opportunities or a sizeable addressable market, it doesn't behoove them to disturb their current, established ways of working or establishments and set up new ones for & in India.
- ✈ We therefore submit that the Govt., should, create a list of parts/ items/ components, whose indigenization is prioritized/ time bound via a Task Force that is drawn up from within the Indian aviation/ aerospace industry. The item list or list of Components should be balanced in terms of their capex / forex need and outflow, and yet prioritized as per customers business need. This list should be made mandatory for orders to be placed with any OEMs by Indian carriers and a roadmap for compliance from OEMs sought to indigenize the production by almost 75% over say 5 years. One way can be to put in a PLI scheme for investors and keep OEMs insulated on immediate financials return on the capabilities created.

Key takeaways:

- ✈ The Defence Capabilities can be upgraded/ augmented with minimum capital Investment like specific tools and equipment's, certification skill sets etc. to take up the requirements in Civil Sector.
- ✈ The Skill sets, Technological capabilities, Manufacturing & MRO Infrastructure, OEM relationship etc.

can be cross utilized to carryout repair and manufacturing of civil parts and platforms in collaboration with OEMs/ Customers/Third party MRO players.

- ✈ Policy Framework on Areas of Convergence between Defence & Civil
- ✈ Unified Regulatory Framework for Identified areas of Convergence project.
- ✈ Policy making it mandatory for new aircraft purchases, leasing in scheduled and general aviation to perform 100% MRO in India with Indian MRO in next 5 years.
- ✈ Develop an Incentive policy for OEMs to bring in Investments in collaboration with DPSUs/ Private Sectors with wide experience in Aeronautics/ Aviation domain to establish Component MRO Shops on the country specifically for components sent abroad for Repair.
- ✈ MRO of Civil airframe platform used by Defence Services to be done in the country under Civil-military convergence project.
- ✈ Policy towards utilization of Full range of capabilities, skill sets and infrastructure existing in DPSUs/ Private Sectors for Manufacturing/ MRO of Components etc.
- ✈ Establishment of a Parts Manufacturing Association in the country under the Gambit of Regulator (DGCA)
- ✈ Policy Framework for Creation of Integrated MRO Hub
- ✈ The government needs to incentivize OEMs to invest capital, through tax breaks, policies, and even strategic investments – and there are lessons to be learnt from other Asian countries on this.
- ✈ In addition to GST reduction from 18% to 5%, and further input tax credit provision.
- ✈ As global engine OEM we also want to be closer to our customers – Incentives like a 10-year tax holiday, like Singapore, will provide tangible benefits to investors.
- ✈ It will motivate domestic and foreign players to setup MRO bases in India.
- ✈ Finally, a single window clearance for MRO in customs will enable MRO firms and OEMs to deliver the efficiency and readiness that our customer's fleets need.
- ✈ A massive opportunity exists for Indian carriers to rebalance the share in the long-haul market.
- ✈ India will continue to be the world leader in growth at 6.2% for the next 20 years (world average is 3.9% for 20 years). This means that India will need ~2,210 new gen aircraft with 25% lower carbon footprint for Indian carriers over 2021-2040.

Wings India 2022 Awards

FICCI successfully organised “WINGS INDIA AWARDS” 2022 for Excellence in the Civil Aviation Sector.

“WINGS INDIA AWARDS” conferred upon the Aviation-related Companies/Institutions/Organizations that have created benchmarks and made notable contributions in the area of Civil Aviation in India. A prestigious Award Ceremony followed by Cultural Evening was organized on **Friday, 25th March 2022 at Hotel Taj Krishna, Hyderabad on the side-lines of WINGS INDIA 2022.**



FICCI invited entries from various companies, organizations, and institutions across India under following Category of Awards: -

- ✈ Aviation Sustainability & Environment
- ✈ Best Airport - General
- ✈ Best Airport Under RCS
- ✈ Best Domestic Airline
- ✈ Best Domestic Airline Under RCS
- ✈ Most Pro-Active State Under RCS - Other than Priority Areas (Best 3 States)
- ✈ Most Pro-Active State Under RCS - Priority Areas (Best 3 States)
- ✈ Best State with a Dedicated Outlook for the Sector
- ✈ Aviation Innovation Award
- ✈ Best Aviation Fuel Service Provider
- ✈ Best Non-Scheduled Operator
- ✈ Best Air-Cargo Service Provider
- ✈ Best Airline / Helicopter Operator Under RCS (Fixed-Wing & Rotary-Wing Aircrafts)
- ✈ Best Agency for Providing Aviation Skills & Training
- ✈ Best Ground Handling Service Provider
- ✈ Best Maintenance Repair and Overhaul Service Provider
- ✈ COVID Champions
- ✈ COVID-19 Responsible Stakeholder
- ✈ COVID-19 Business Continuity Award
- ✈ Best Drone Company

The nomination forms with respect to the above categories were designed by PWC. Accordingly, we invited industry to participate and submit their nominations. The nomination fee per category for applying for awards was Rs. 10,000 + taxes.

A total of **160** applications were received.

The initial screening and evaluation of the application received is being undertaken by FICCI in association with PWC (knowledge partner) of the event. The Final selection of the awardees will be undertaken by Jury members in the Jury meeting.

The jury committee comprised of the following:

- **Shri K N Srivastava**, Director, India International Centre & Former Secretary, Ministry of Civil Aviation
- **Mr. Jitendra Singh Rawat**, Former Joint Director General Civil Aviation, Government of India
- **Dr. R K Tyagi**, Co-Chair, General Taskforce, FICCI & Former CMD, Hindustan Aeronautics Limited (HAL) & Pawan Hans Helicopters Ltd.
- **Mr. V Somasundaram**, Ex Member, ANS, AAI
- **Mr. Virender Singh**, MD & CEO, Andhra Pradesh Airports Development Corporation Limited

Winners

S. No.	Categories	Sub-Category	Winners	
1	Aviation Sustainability & Environment	Airport	Delhi International Airport Ltd. & Mumbai Delhi International Airport Ltd	2
2	Aviation Sustainability & Environment	Airline	Vistara	1
3	Aviation Sustainability & Environment	Manufacturer	AIRBUS	1
4	Best Airport	General >25 Million Passengers	Bangalore International Airport Ltd.	1
5	Best Airport	General <25 Million Passengers	Hyderabad International Airport Ltd.	1
6	Best Airport	under RCS	Airports Authority of India – Hubballi Airport	1
7	Best Domestic Airline		Vistara	1
8	Aviation Innovation Award	Airport	Bangalore International Airport Ltd.	1
9	Aviation Innovation Award	Airline	SpiceJet	1
10	Aviation Innovation Award	Manufacturer	HAL	1
11	Aviation Innovation Award	Service Provider	Stelae Technology	1
12	Best Aviation Fuel Service Provider		Indian Oil Sky taking	1
13	Best Non-Scheduled Operator	Fixed Wing	Indo Pacific Aviation Private Limited (JetSetGo)	1
14	Best Non-Scheduled Operator	Helicopter	Himalayan Heli Services Pvt Ltd	1
15	Best Air Cargo Service Provider		Celebi Delhi Cargo Terminal	1
16	Best Helicopter Operator under RCS		Pawan Hans Limited	1
17	Best Airline under RCS		Flybig Alliance Air Star Air	3

S. No.	Categories	Sub-Category	Winners	
18	Best Agency for Providing Aviation Skills & Training		GMR Aviation Academy & Civil Aviation Training College, Airports Authority of India	2
19	Best Ground Handling Service Provider		Air India SATS & Bird Ground Handling Service	2
20	Best Maintenance Repair and Overhaul Service Provider		Air Works (Winner) Bird ExecuJet Airport Services (Runner-up)	
21	COVID Champions	Airport	Cochin International Airport Limited (CIAL) Delhi International Airport Limited (DIAL)	2
	COVID Champions	Airline	SpiceJet Vistara IndiGo Air Asia Go Air	5
	COVID19 – Business continuity		Air India Express Air Works	2
	Best Drone Company		Rotor Precision Instruments Pvt. Ltd.	1
	Most Pro- Active States & UTs under RCS- Priority Areas		Govt. of Assam, Himachal Pradesh, Meghalaya, Mizoram, Nagaland, Sikkim, Tripura, Uttarakhand, UT of Andaman & Nicobar, UT of Jammu & Kashmir, UT of Ladakh, UT of Lakshadweep	12
	Most Pro-Active State Under RCS - Other than Priority Areas		Govt. of Haryana, Jharkhand, Rajasthan, West Bengal, UT of Dadra & Nagar Haveli and Daman & Diu	6
	Best States with a Dedicated Outlook for the Sector		Govt. of Gujrat, Telangana	2
	Most Dynamic States in Aviation		Govt. of Karnataka, Kerala, Madhya Pradesh, Maharashtra, Tamil Nadu, Uttar Pradesh	6

S. No.	Categories	Sub-Category	Winners	
	Emerging States & UTs in Aviation		Govt. of Andhra Pradesh, Arunachal Pradesh, Mizoram, Nagaland, Odisha, UT of Puducherry	6
	Award for Outstanding Contribution to Aviation		Late Dr. Ankur Bhatia, Former Executive Director Late Mr. Anuj Aggrawal, Former Member HR - AAI	2
	Award for Outstanding Services during to COVID-19 Pandemic		Airports Authority of India – Air Navigation Services (ANS)	1
	India's only Indigenous Military Helicopter display team with India Airforce		SARANG	1

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