

# **Handling Policy Grounded ...Yet Again**



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# Handling Policy Grounded ....Yet Again

On 1 July 2009, the Government of India announced that the introduction of the new ground handling policy would be delayed yet again for another six months. The announcement took place on the very day that the new policy was due to come into effect. Given that the ground handling activity at metro airports in India involves tens of thousands of employees and involves capital equipment valued at millions of dollars, the lack of certainty with respect to planning horizons has been a challenging issue for airports, airlines and ground handlers alike.

The policy was deferred in order to undertake a “thorough review” given the complexity of the issues involved, particularly competition and security. The proposed policy would no longer permit airlines to self-handle at the key airports of Mumbai, Delhi, Kolkata, Chennai, Hyderabad and Bangalore. Instead, it would only permit three agencies, including Air India, the airport operator and one private company to conduct ground handling at each of these metro airports.

The competition issues are evident but removing the airlines from the business of their own handling, possibly to be replaced by a ‘private company’ leads by necessity to the question of just who that company is, what experience does it have in the business and, how well it can deliver high quality services and critically, what can it do to ensure that its security provisions are not breached. The ground handling policy will need to be assessed on the basis of what it delivers in terms of quality, efficiency (and by extension cost effectiveness) and security.

## Scope of Ground Handling

The scope of ground handling activities covers a multitude of activities and includes:

- **Catering** (inflight food and beverage, although this sector is having to adapt to the changing airline business models where a meal is either no longer offered or is available for purchase);
- **Cabin service** (cleaning, replenishment etc., sometimes carried out by local companies);
- **Ramp service** (aircraft guidance, towing, low grade maintenance and visual aircraft inspection, water and lavatory drainage, ground power, air conditioning, engine start, baggage handling, gate baggage, refuelling/de-fuelling, passenger stairs, staff transport, wheelchair lifts and handling, de-icing)

- **Passenger service** (check-in counters for departing airlines, gate arrival and departure services, transfer, customer service, lost baggage, airline lounges)
- **Field operation** (aircraft dispatch in liaison with the airline and air traffic control)

While there is no fixed template across the world, ground handling is generally a specialised activity with high quality security equipment for baggage and cargo handling especially and it has not been the most openly competitive area of airport operations. Regulations vary widely across the globe, often based on an historic pretext as in the USA, or latterly driven by the feverish desire to enhance 'competition' that is often found in pan-national trading blocks such as the EU. But regulation is often subverted by reality. Where airports allow self-handling the cost is often so high that airlines prefer to hire certified ground handling operators where they can.

### **United States**

There is not much of a separate ground-handling industry in the US; it is nearly all airline self-handling and some airport-provided services. There are few places where airlines are not permitted to self-handle. One small exception is the new private Branson (Missouri) airport, which so far is providing the ground handling services to its (so far two) airline customers. Branson operates outside usual FAA parameters. This is part of the package deal they are offering to LCCs to start service there and more examples of this type may follow.

### **Europe**

Ground handling is certainly no closed shop in Europe where the market in ground handling services is covered by the European Commission (EC) Directive 96/67/EC dating from Oct-96, which gradually opened up the services to competition. This was deemed necessary by the EC since the checking-in of passengers, baggage handling, the provision of catering services, and so on used to be a monopoly at many EU airports, and many airlines complained about the relatively high prices for the services provided and sub-optimal efficiency and service quality.

The Directive essentially stipulates that at the larger EU airports access to the market by suppliers of ground handling services is free and that for certain categories of services the number of suppliers may be no fewer than two for each category of service. Moreover, at least one of these suppliers should be entirely independent of the airport or the dominant air carrier at that airport. Similar provisions exist with regard to self-handling, which means that airlines provide the services in question for themselves: for these services there should at least be two air carriers admitted.

While the process of transposing the Directive into the national legislation of each Member State has not always been smooth, the EC claims the positive impact can now be seen throughout the EU. The number of suppliers has increased along with the growth in air

transport in general, the prices for ground handling services have decreased and the quality of services has generally improved.

The Commission is considering the launch of a proposal to modify the Directive. This proposal would aim at a gradual increase of competition in the ground handling market while taking into account appropriate social protection of ground handling staff, and at a clarification and simplification of a number of provisions where necessary.

A practical example of this policy in action can be found in Scandinavia where three of the four countries are members of the EU, the exception being Norway.

In Scandinavia, where there are a high number of small and lightly-used regional airports, there is a complex situation. When an airline comes into an airport for the first time it can choose a deal freely. The major ground handler is Scandinavian Ground Services (SGS) located at Copenhagen, Stockholm and Oslo, the three main hubs for the region for the pan-national airline SAS. A subsidiary of SAS, it is currently up for sale as part of the disposal of non-core business. Menzies is the other major handling agent.

It was the case that for regional airports no other choice existed. Liberalisation has prompted several new start-ups to chance their arm, including Norport, Roros Flyservice, Wideroe Handling and Novia. Often there is a 'specialisation' that has helped win the business. For example in the case of Wideroe Handling it is that firm's ability to handle the rapid turnarounds demanded by Ryanair while Norport has specialised in the entertainment sector, such as the handling of rock bands and sports teams, also VIPs. Interestingly, Norport, Roros and Wideroe Handling are based in Norway, the non-EU country but one where ground handling liberalisation is the most comprehensive. Norport's success in particular has prompted other airlines to consider alternatives to SGS. In Finland, Airpro, a wholly owned subsidiary of Finnish state airport operator Finavia, is the market leader and has broadened its sphere of influence into the Baltic States.

## **Asia**

Southeast Asia has lagged behind Europe in many aspects of liberalisation but is slowly moving in that direction where ground handling is concerned. At Singapore Changi Airport a third ground handler was permitted to commence operations at the beginning of Mar-05, in advance of the opening of the 'Budget Terminal' for LCCs and Terminal 3. Swissport won the 10-year license covering passenger, baggage and cargo handling and attracted a mix of legacy and budget airlines.

Ground handling services there were then provided by three companies: Singapore Airport Terminal Services (SATS), and Changi International Airport Services (CIAS) and Swissport. SATS, a subsidiary of Singapore Airlines, is the dominant player with close to 80% of the market. CIAS was formed in 1981 by the Port of Singapore and four airlines (Air France-KLM, China Airlines, Garuda Indonesia and Lufthansa. CIAS was restructured in Jun-05 when its

shareholding was bought by DNATA of Dubai and Temasek Holdings (the Singaporean state investment vehicle).

Then three became two after Swissport ceased operation on 31-Mar-09 owing to heavy losses. But only for a day as Asia Pacific Star was launched on 01-Apr; a subsidiary of SATS and concentrating mainly on budget carriers.

Further changes may emanate from the corporatisation and restructuring of the Civil Aviation Authority of Singapore and Changi Airport Group, which will focus on the management of Changi Airport. The latter is likely to be sold to Temasek Holdings.

Events at Singapore prove there are no certainties arising from greater liberalisation of ground handling services.

### **Ground Handling at Indian Airports**

Ground handling at many airports across in India is characterised by the operation of multiple agencies (frequently unlicensed) performing a variety of functions. While some of the larger organisations are of high quality, many of these operators do not comply with the IATA definition of ground handling and could be more accurately described as manpower companies. These agencies can be extremely specialised with some supplying only drivers or cleaners for example, and their focus has been on manual operations, with limited investment in equipment. Even carriers that claim to self-handle, in most cases utilise the services of these agencies for “under the wing” activities. Proponents of the proposed reforms argue the new policy will deliver the following:

**Enhanced Security:** the multiplicity of companies operating at the airport creates a security nightmare as it is becoming unmanageable to effectively monitor personnel with access to the terminal and more importantly, to ‘airside’ which includes the apron, hangars, cargo area and the aircraft itself.

**Improved Safety:** most of these organisations have made limited investment in the latest equipment or in providing a comfortable working environment, resulting in a greater likelihood of occupational safety and health lapses.

**Higher Quality:** the use of dated equipment by the current ground handlers, that is not specifically designed for airport operations results in an inferior passenger experience. There is a need to bring international standards of ground handling to Indian airports.

**Greater Efficiency:** having multiple agencies, with limited coordination and poor planning results in duplication of resources and sub-optimal operations. Professional ground handling services will generate efficiencies through improved performance and the economies will drive costs lower.

To address these issues, the Government of India has planned to introduce a new ground handling policy, however for the time being this policy remains very much grounded.

## India Policy Background

In October 2007, the Government of India announced that effective 1 January 2009, only the following companies would be permitted to provide ground handling services at six Indian metro airports and 35 non-metro airports:

- 1) Airport operator (i.e. Airports Authority of India, or the private joint venture operator in the case of Delhi, Mumbai, Cochin, new Hyderabad and new Bangalore);
- 2) Ground handling subsidiary of the national carrier i.e. Air India, or its joint ventures;
- 3) Independent ground handling company selected through a competitive bidding process, subject to security clearance.

Consequently, there would be a maximum of three ground handling companies permitted to operate at a given airport. Any ground handlers currently operating at the six metro airports who did not meet the above criteria would effectively have been required to close down their operations by the end of 2008.

The official passenger ground handlers at the five private airports are:

New Delhi	Mumbai	Bangalore	Hyderabad	Kochi
Air India/SATS*	Air India/SATS*	Air India/SATS	Air India/SATS	Air India
Cambata#	Cambata#	Globe Ground / Lufthansa	Menzies Bobba	/ Worldwide Flight/Bird Group
Worldwide Flight/Bird Group	Celebi/NAS			

\*subject to finalisation of AI/SATS agreement

# Cambata / Menzies earlier had a Joint Venture arrangement which was disbanded, however any outstanding issues between the two companies have now been resolved, a 50:50 JV is planned and they plan to re-tender for the Delhi/Mumbai concessions.

## The Airline Response

Under the proposed regulations, airlines would not be permitted to self-handle at metro airports, as several of them currently do. Domestic airlines would, however, be allowed to continue self-handling at non-metro airports – this rule would not extend to foreign carriers. A number of carriers have raised objections to the policy on the basis that having to contract a third party organisation will result in:

- **Loss of Control over Service Quality:** airlines have argued that they need to have control over important customer-facing activities (eg. check-in, gate) as this is an important part of their service delivery and brand positioning which they prefer to

conduct themselves. They believe that third party ground handling staff would not effectively reflect the culture of the airline;

- **Diminished On Time Performance:** airlines have indicated that while they are less concerned about the service impact of outsourcing ramp activities, they remain cautious on the basis that they may lose some control over on-time-performance as they believe the ground handler would be less concerned about such issues;
- **Higher Costs:** airlines that CAPA spoke with argued that the “under the wing” costs achieved as a result of self-handling using manpower from the current agencies are very competitive and that the official handling agencies will be at least 20-30% more expensive.
- **Inconsistent Quality Improvements:** they believe that despite claims that the new handling agencies are introducing state-of-the-art facilities, not all are doing so and that some continue to use non-IATA compliant equipment;
- **Limited Competition:** with a maximum of three ground handlers at any airport, and in some cases less, the level of competition is limited. Airlines argue that Air India/SATS is not interested in pitching for domestic handling contracts, leaving just one concessionaire at Bangalore and Hyderabad and two at Delhi and Mumbai, which limits their negotiating position.

Meanwhile, at Kochi, despite the recent end to the Air India ground handling monopoly, the very high revenue share agreement which the airport operator has entered into with the independent handler means that rates have not experienced a noticeable decline. Airlines are therefore very keen for the Airport Economic Regulatory Authority to be established as soon as possible in order to review some of these issues and to introduce some uniformity and a level playing field to the tariff structures.

Airlines state that they have no reason to resist the introduction of cost competitive, world class ground handling services in India, it would only be to their benefit. However, they believe that the policy as it is currently structured, particularly in the absence of AERA, does not deliver these outcomes. They are at the very least seeking a compromise arrangement whereby they would continue to provide in-terminal ground handling (which involves service touch points with the passenger), leaving behind-the-scenes handling such as baggage, ramp and aircraft servicing to third parties.

As a result of the objections raised, in December 2008 it was announced that the introduction of the new policy would be deferred to 1 July 2009. However, the matter has now been delayed by a further six months. Important policy matters remain grounded.

### **The Ground Handlers’ Perspective**

Ground handlers point out that with the investment that they are making in state-of-the-art equipment, service quality and efficiency will actually improve. They argue that what

currently constitutes ground handling in India is simply not up to international standards. While the current agencies may be very cost effective, it is possible to be so by virtue of the fact that the services they offer fall short in terms of compliance on safety and security parameters. There is for example, a significantly increased capital outlay in using airport compliant tractors, as opposed to farm tractors as are often used at Indian airports. Similarly, modern passenger transport buses cost up to ten times standard vehicles.

If India is to have international standard ground handling, then this is an investment that will need to be made. The introduction of international best practice procedures and software-based resource allocation systems will lead to greater efficiencies in the utilisation of equipment. Poor planning and coordination for example, means that Mumbai Airport has a listed inventory of more than 90 ground power units, more than three times that which would ideally be necessary for an airport of its size.

Furthermore, the traditional handling agencies are significantly overstuffed. Once the new policy comes into effect, the official agencies will have to recruit some of the employees of the airlines and manpower agencies, however their more efficient structures will undoubtedly mean the need for some redundancies, which will be painful and could result in industrial action. However, in the long term this should result in increased efficiencies, lower costs and a higher quality of service.

With respect to costs, there will need to be some adjustment for the increased capital outlay. However, this is not due to the outsourcing of the activity but is a reflection of the need to upgrade equipment, something which airlines themselves would face even if they continued to self-handle.

Ground handlers have however expressed some frustration that the very high revenue share agreements that have been signed with some airport operators prevent them from reducing rates to as low as they would ideally like.

In terms of international handling, it is also interesting to note that the official ceiling rates at Delhi and Mumbai for a B747 are in fact less than that which several airlines pay today.

#### **Ground Handling Ceiling Rates at Delhi/Mumbai (INR)**

	<b>Domestic</b>	<b>International</b>
<b>Code B</b>	8,500	44,000
<b>Code C</b>	10,000	73,500
<b>Code D</b>	13,500	120,000
<b>Code E</b>	45,000	141,950
<b>Code F</b>	80,000	198,000

Source: CAPA Research

A number of foreign airlines have also been faced with a monopoly situation with regard to ground handling services in India. In recent years it has been commonplace for overseas carriers to enter into commercial agreements with Air India in relation to unutilised capacity available under bilateral agreements. The commercial arrangement frequently required the foreign carrier to utilise Air India's ground handling division, at high cost and often poor quality. However, from next year these commercial agreements will cease to exist and airlines will be free to use any handler.

Domestic carriers are convinced that they can self-handle for less, however if they were to make similar investments in compliant equipment and fully allocate their costs this may not be the case.

For some reason, the sectoral policy only applies ceiling rates at Delhi and Mumbai (and even there it is understood that the ceilings are frequently exceeded), but not at Bangalore and Hyderabad where market forces apply.

Ceiling rates are not the only area in which the pricing of handling service varies between the Greenfield airports and others. At Bangalore and Hyderabad for example, cargo operators are required to absorb the costs of Customs facilities, which is not the case elsewhere. Ironically, it is these new airports which offer the most advanced international cargo facilities in India, that are faced with a competitive disadvantage with respect to handling freight.

To this extent, the role of the Airport Economic Regulatory Authority will be critical in monitoring such issues, however it will need to take into account key factors such as aircraft movements, traffic volumes and the mix of aircraft types before structuring pricing guidelines.

### **Low Cost Ground Handling**

An important trend for ground handlers to be cognisant of in the Indian market is the rapid growth of the low cost airline model. LCCs did not exist in India just six years ago, and today they, together with all-economy subsidiaries of full service carriers, account for 55-60% of domestic market share, a figure that is likely to increase to 70% by the end of the current financial year. There is also an increasing share of capacity on shorthaul international routes accounted for by low cost carriers.

As their negotiation position strengthens, not only will they seek very competitive bids from their suppliers, but they will increasingly start to demand changes in the way that ground handling functions are conducted in order to remove activities which they see as being superfluous, and to improve and simplify processes to reduce turnaround times. This is a very important shift in the airline business model and one which ground handlers need to

incorporate into their planning and capital expenditure processes. Coordination with airports as well as the airlines will be a critical requirement.

Globally, examples can be seen of ground handlers responding to this phenomenon. Several years ago, Menzies Aviation for example launched its KISS (Keep it Safe and Simple) product for low cost airlines. The differentiator of this product is in fact in the human element, and focuses on multi-tasking, and developing an internal culture that is very objective driven and in which remuneration is incentivised in relation to meeting service level agreements for airlines, such as achieving fast turnarounds. In Singapore, as mentioned, the largest ground handler SATS, has established a separate company, Asia Pacific Star, to focus on low cost airlines. Again the focus is on streamlining workflows and effective assignment of staff resources to process aircraft faster. Keeping aircraft in the air and not on the ground is the most valuable contribution that handlers can make.

### **Air India Ground Handling Concession**

As the one concession which under the policy has a guaranteed slot at all airports, Air India (either by itself or in conjunction with a JV partner) is an important operator in the market. Earlier this year, Air India and SATS of Singapore announced plans to establish a JV to operate across India. Air India and SATS were already working together at the greenfield airports in Bangalore and Hyderabad. As these two operations were developed earlier, they had a slightly different shareholding structure to the national JV, which will be 50:50 (the shareholding was 60:40 to Air India in Bangalore and 51:49 in Hyderabad). However, it is expected that these will be aligned in due course. SATS will appoint the Chairman and key management posts at the JV company.

The Air India-SATS JV has not been without controversy. The agreement has yet to be signed as the Cabinet approval was for a JV with SATS, whereas the Singaporean handler has proposed that the signatory would be a recently formed subsidiary, SATS Investment, which does not have established expertise or financials. This change in structure had surprised Air India which has argued that it violates the terms of the tender process. In addition, the proposed commercial arrangements offered by the JV to Air India itself for handling services, were seen to be unfavourable. It is believed that Air India could expect to pay charges 20% higher than Air India ground handling currently charges third party carriers. In fact, a competing ground handler has apparently offered to handle Air India flights for reportedly 40-50% less than the Air India-SATS JV.

The former Chairman and Managing Director (CMD) of Air India, Raghu Menon, had reportedly raised objections to some of these issues and had sought operational freedom to be able to appoint other ground handlers if the Air India-SATS JV offer was too high.

Another possible issue that may be faced by the JV is that while it is a national arrangement, SATS is only likely to be interested in operating concessions at a few selected cities which

exhibit the best commercial potential. However, Air India, due to its national carrier status and operations at numerous cities across the country is likely to seek to operate at a much wider range of airports. As a result, it may need to develop some ground handling operations separately from the JV.

Furthermore, if the JV does eventually go ahead, industry sources suggest that Air India may have to invest as high as USD120 million in new equipment, an amount it cannot afford at this time. Amidst the current difficulties facing Air India, the issues related to this JV will be an additional challenge for the current CMD, Arvind Jadhav.

### **Airports Authority of India Tender**

For airports which will be modernised by the Airports Authority of India, namely Kolkata, Chennai and 35 non-metro airports, the AAI will hold one of the ground handling concessions. In April 2007 the AAI invited Expressions of Interest from parties for the formation of a joint venture. The AAI did not intimate whether there would be a single partner appointed national or whether there should be separate partners for each zone, North, South, East and West.

The eligibility criteria were as follows:

- Minimum 5 years experience in IATA-standard ground handling services;
- Operations at a minimum of 10 airports either in India or abroad;
- Annual turnover greater than US\$75 million per annum from ground handling operations in any of the last three financial years;
- Equity holding for international companies would be as per foreign direct investment guidelines for the sector.

Expressions of Interest were received from the following companies:

- Globe Ground India Pvt Ltd
- SPDH - Services Portuguese de Handling SA / Aviation India Ltd
- Equity Aviation Services / Cambata Aviation Pvt Ltd
- Dnata / Track India Pvt Ltd
- Celebi Ground Handling Turkey / Spencer Travel Services Ltd
- Iberia / ISMT / Taneja Aerospace / JMD Consultants
- Bhadra International Ltd / Navia International Consulting
- Penauille Servis Air / RR Joshi
- Swissport Punj Lloyd India Pvt Ltd
- Worldwide Flight Services / Bird Consultancy Services Ltd
- Jet Air Pvt Ltd / Aircraft Services International Group
- Bahrain Airport Services / NAS Kuwait / Nova Aviation Services
- Indian Airlines
- Singapore Airport Terminal Services Ltd
- Evergreen Aviation Ground Logistic Enterprises/ JJ Hospitality Services
- Global Aviation Services Pvt Ltd / Knafaim Holding Ltd, Tel Aviv
- Jeena & Company Mumbai
- O.S.S. Aviation Pvt Ltd, Bhopal

However, it is understood that the process will now re-commence with a separate tender for the metro airports, Kolkata and Chennai, whilst the number of non-metro airports to be included will be reduced from 35 to 18. The decision to separate the metro airports does seem sensible in light of their quite different requirements. At this stage though, details about the nature of the tenders are limited.

### **Foreign Direct Investment**

Foreign direct investment limits were revised as of 30 January 2008, increasing from 49% to 74%. As this followed the issuance of the tender, the revised law may change the preferred equity structures for foreign parties. A number of the foreign partners may now prefer to take a majority stake. However, due to the access that ground handling companies have to aircraft, there are sensitivities (often politically driven) related to security issues and the role of foreign companies. And the repeated and last minute delays in the implementation of this policy may have damaged India's reputation as an investment destination, changing the attitude towards India in boardrooms around the world from "upbeat" to "cautious".

### **Conclusion**

At Indian airports today, much of what constitutes the ground handling industry does not comply with IATA standards. Overstaffing, duplication of resources, the use of inappropriate equipment and the presence of multiple unlicensed agencies create an environment in which safety, security and insurance risks are heightened. Quality standards and cost efficiencies may also be compromised.

If Indian aviation is to reach its potential over the coming years as one of the leading markets in the world, it is important that the industry is supported by a safe, efficient and high quality ground handling sector. Achieving this goal will require millions of dollars of investment, something which the airlines are not in a position to do. Nor is it their core competence.

The airport modernisation program, and associated developments such as the new ground handling policy are ultimately at a nascent stage of their development. Consequently, it is not unexpected that there will be teething problems, delays and some pain as the system adjusts to a new paradigm. All those involved are learning along the way. However, the frustrating issue for the main parties involved is that the key policy decisions have been taken without sufficient consultation with stakeholders and are announced late in the day, creating significant planning challenges. Confusion has reigned on the issues of the metro airport policy, the Airports Authority of India tender and the application of ceiling prices.

The intent behind the new policy has been to bring world class ground handling services to India by streamlining the highly fragmented nature of current activities, and encouraging strategic foreign investment by leading international operators. This is a positive and

desirable objective, and is in the national interest. The airlines have managed to block this process, although some of their concerns are valid. There is a need to move to a compromise solution which allows airlines to continue to handle “customer touch” activities, with under the wing functions left to the ground handlers. The other major concern for airlines relates to costs. Some of these issues may be resolved through increased communication between the parties involved, to better understand the implications of the policy and how it can be developed into a positive. But it becomes increasingly apparent that the absence of an economic regulator is a critical issue and it is imperative that AERA is functionalised as soon as possible.

The uncertain regulatory environment across many sectors of the Indian economy is already leading best-in-class foreign operators to re-consider their entry into the market and the same may occur in the ground handling sector. It is important that Cabinet sends a strong message by issuing clarity on the policy as soon as possible.

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