

# **RESEARCH REPORT ON AIRPORT DEVELOPMENT IN INDIA**

- ❖ **TABLE OF CONTENTS**
  - ❖ **LIST OF TABLES**
  - ❖ **ORDER FORM**
-

# AIRPORT DEVELOPMENT IN INDIA

**Table of Contents** (Release date: December 13, 2009. Number of pages: 234)

<p><b>1. OVERVIEW</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Macroeconomic Scenario</li> <li>- Industry Structure</li> <li>- Policy Framework</li> <li>- Traffic Trends</li> <li>- Key Projects: Modernisation, Greenfield</li> <li>- Financing Requirement</li> <li>- Emerging Opportunities</li> <li>- Challenges</li> </ul> <p><b>2. TRAFFIC TRENDS AT AIRPORTS</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Airport Categories</li> <li>- Passenger Traffic: International Passenger Traffic, Domestic Passenger Traffic</li> <li>- Aircraft Movement: International Aircraft Movement, Domestic Aircraft Movement</li> <li>- Freight Traffic: International Freight, Domestic Freight</li> <li>- Conclusion</li> </ul> <p><b>3. POLICY AND REGULATORY FRAMEWORK</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Institutional Structure: Ministry of Civil Aviation; Directorate, General of Civil Aviation, Bureau of Civil Aviation Security</li> <li>- Legal Acts: Aircraft Act, 1934, Airports Authority of India Act, 1994</li> <li>- Regulatory Framework: Safety and Security Regulations, Regulations for Environmental Standards, Economic Regulation</li> <li>- Policy Framework: Policy on Airport Infrastructure, 1997, Greenfield Airport Policy, 2008, Ground Handling Policy, 2008, Proposed MCA for PPP in Airports, FDI Norms, Domestic Air, Transport Policy, 1997, Slot Allocation at Airports, Air Service Agreements, Other Developments</li> <li>- Issues and Concerns</li> </ul> <p><b>4. ECONOMICS AND FINANCING</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Economics</li> <li>- Financing Requirements</li> <li>- Sources of Funds: Budget Resources, AAI Internal Resources, Private Funds</li> <li>- The Way Forward</li> </ul> <p><b>5. KEY AIRPORT MODERNISATION PROJECTS</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Mumbai Airport</li> <li>- Delhi Airport</li> <li>- Kolkata Airport</li> <li>- Chennai Airport</li> <li>- Non-Metro Airports</li> <li>- Key Issues and Challenges</li> <li>- The Way Forward</li> </ul>	<p><b>6. KEY GREENFIELD AIRPORT PROJECTS</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Bangalore Airport</li> <li>- Hyderabad Airport</li> <li>- Navi Mumbai Airport</li> <li>- Kannur Airport</li> <li>- Shimoga and Gulbarga Airports</li> <li>- Sindhudurg Airport</li> <li>- Greater Noida Airport</li> <li>- Other Greenfield Airports</li> <li>- Key Issues and Challenges</li> <li>- The Way Forward</li> </ul> <p><b>7. PROFILES OF KEY AIRPORT DEVELOPERS</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Airports Authority of India</li> <li>- GMR Infrastructure Limited</li> <li>- GVK Power and Infrastructure Limited</li> <li>- Larsen &amp; Toubro</li> <li>- Bengal Aerotropolis Project Limited</li> </ul> <p><b>8. AIRLINES OVERVIEW</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Industry Overview: Structure, Operational Parameters, Financial Performance, Recent Airline Restructuring</li> <li>- Infrastructure and Services' Needs</li> <li>- Experience at Greenfield/Modernised Airports</li> </ul> <p><b>9. NEW AND EMERGING OPPORTUNITIES</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Maintenance, Repair and Overhaul</li> <li>- Cargo Hubs and Airports</li> <li>- Other Opportunities: Merchant Airports, Low Cost Terminals</li> <li>- Conclusion</li> </ul> <p><b>10. GLOBAL AIRPORT SCENARIO</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Key Global Organisations: International Civil Aviation Organisation: Airports Council International: Federal Aviation Administration: Other Bodies (Airlines and Others)</li> <li>- World Traffic: Passenger Traffic, Cargo Traffic, Future Growth Forecast</li> <li>- Key Global Trends: Liberalisation, Privatisation, Growth of Low-Cost Carriers, Regional Air Travel Trends</li> <li>- Key Industry Concerns</li> </ul> <p><b>11. FUTURE OUTLOOK</b> .....</p> <ul style="list-style-type: none"> <li>- Introduction</li> <li>- Key Drivers of Growth: Demand Side Factors, Supply Side Factors</li> <li>- Future Scenario: Traffic, Airport Sustainability, Investments, Airport Infrastructure</li> </ul> <p><b>12. APPENDIX</b> .....</p>
--	---

## List of Tables

GDP Growth in India during 2004-05 to 2008-09	Non-metro Airport Modernisation - Himachal Pradesh
Summary of Airport Classification	Non-metro Airport Modernisation - Jammu & Kashmir
Traffic Growth Rate at Airports (year-on-year rate, %)	Non-metro Airport Modernisation - Jharkhand
Key Airport Modernisation Projects	Non-metro Airport Modernisation - Karnataka
Key Greenfield Airport Projects	Non-metro Airport Modernisation - Kerala
Planned Investments for Modernisation Projects	Non-metro Airport Modernisation - Madhya Pradesh
Planned Investments in Greenfield Airports	Non-metro Airport Modernisation - Maharashtra
Airport Categories	Non-metro Airport Modernisation - North-East
Total Passenger Traffic Growth	Non-metro Airport Modernisation - Orissa
Airport Category-wise Break-up of Passenger Traffic (million)	Non-metro Airport Modernisation - Punjab
Region-wise Break-up of Passenger Traffic (million)	Non-metro Airport Modernisation - Rajasthan
International Passenger Traffic Growth	Non-metro Airport Modernisation - Tamil Nadu
Airport-wise Break-up of International Passenger Traffic	Non-metro Airport Modernisation - Union Territories
Domestic Passenger Traffic Growth	Non-metro Airport Modernisation - Uttarakhand
Airport-wise Break-up of Domestic Passenger Traffic	Non-metro Airport Modernisation - Uttar Pradesh
Aircraft Movement Growth	Non-metro Airport Modernisation - West Bengal
Airport Category-wise Break-up of Aircraft Movement ('000)	Project Overview
Region-wise Aircraft Movement ('000)	Key Infrastructure Parameters at Bangalore Airport
International Aircraft Movement Growth	List of Concessionaires at Bangalore Airport
Airport-wise Growth in International Aircraft Movement	User Development Fee at Bangalore Airport
Domestic Aircraft Movement Growth	Project Overview
Airport-wise Break-up of Domestic Aircraft Movement	Quarter-wise Key Operational Parameters 2008-09
Trends in Freight Traffic	Key Infrastructure Parameters at Hyderabad Airport
Category-wise Break-up of Freight Traffic ('000 tonnes)	Master Plan of Hyderabad Airport
Region-wise Trends in Freight Traffic ('000 tonnes)	List of Concessionaires at Hyderabad Airport
International Freight Traffic Growth ('000 tonnes)	Aviation Related Projects of GHIAL
Airport-wise Break-up of International Aircraft Movement	Financing Structure for the Hyderabad Airport Project (Rs billion)
Trends in Domestic Freight Traffic ('000 tonnes)	Loans Sanctioned by Participating Banks/Financial Institutions
Airport-wise Break-up of Domestic Freight Traffic	User Development Fee at Hyderabad Airport
Route Dispersal Guidelines	GHIAL Financials for 2008-09
Requirements for Starting Scheduled, Non-scheduled and Cargo Operations	AAI Managed Airports as of July 2009
Components of Airport Revenues	Capital Structure of AAI (Rs billion)
International Comparison	Financial Performance of AAI (Rs billion) since 2003
Break-up of Revenue Components at the Delhi Airport (Rs million)	Shareholding Pattern in GIL as on June 30, 2009
Airport Sector Performance of GMR	Airport Partners of the GMR Group
Global Non-aeronautical Revenue Comparison	Projects Under Implementation by GMR Infrastructure Limited (as on March 31, 2009)
Modernisation Projects	GMR's Subsidiaries Engaged in Aviation Related Activities
Upcoming Investments in Greenfield Airports	Consolidated Financial Results of GIL (Rs billion)
Budgetary Support in the Past Five Years	Aviation Sector Contribution to GMR's Financials (%)
Components of Total Revenue of AAI in 2007-08	Shareholding Pattern of GVKPIL as on June 30, 2009
Key Financial Parameters of AAI (Rs million)	Consolidated Financial Results of GVKPIL (Rs billion)
Project Overview	Segment-wise Contribution to GVK's Financials (%) in 2008-09
Key Operational Parameters	Shareholding Pattern of L&T as on June 30, 2009
Key Infrastructure Parameters at Mumbai Airport as of March 2009	Airport Projects of L&T Limited as on March 31, 2009
Upcoming Infrastructure at T2	Consolidated Financial Results of L&T (Rs billion)
Phase-wise Plan for Clearing Encroached Land	Contribution of Engineering and Construction Division to L&T's Financials (%)
List of Concessionaires	BAPL's Project Partners for the Durgapur Aerotropolis Project
Project Overview	Scheduled Airlines in India
Key Operational Parameters	Operational Parameters for Scheduled Airlines (domestic and international operations)
Key Infrastructure Parameters at Delhi Airport	Airline Domestic Market Shares
Master Plan for Delhi Airport Modernisation	Net Profit/(Net Loss) of Airlines (Rs million)
Key Infrastructure Parameters at Terminal 1D	Detailed Half-Yearly Financial Results of Listed Airlines, 2009-10 (Rs million)
Key Infrastructure Parameters at Terminal T2	Ground Handling Service Providers
Details of Upcoming Infrastructure at T3	Air Traffic Service Providers
Completed Capital Work at T3 as of June 2009	Safety & Security Services Providers
List of Concessionaires	Other Service Providers
Financing Plan (Phase 1)	Authorised Appropriation 2008-2010 (in Canadian Dollars)
Annual Financial Performance of DIAL (Rs million)	Authorised Appropriation 2008-2010 (US Dollar thousand)
Key Infrastructure Parameters at the Kolkata Airport	Global Traffic (PKP) Growth
Salient Features of the Action Plan	Region-wise Global Traffic Growth 2008
Upcoming Infrastructure at the Kolkata Airport	World Airports Ranking by Total Passengers (2008)
Key Infrastructure Parameters at the Chennai Airport	World Airports Ranking by Traffic Growth (2008)
Salient Features of the Action Plan	Total Global Passenger Traffic January-August 2009 ('000)
List of Key Contractors for Ongoing Development Works	Global International and Domestic Passenger Traffic January-August 2009 ('000)
Upcoming Infrastructure at the Chennai Airport	Region-wise Global Freight Traffic Growth (2008)
Non-metro Airport Modernisation - Andhra Pradesh	World Airports Ranking by Total Freight (2008)
Non-metro Airport Modernisation - Bihar	Total Global Freight Traffic, January-August 2009
Non-metro Airport Modernisation - Chhattisgarh	Global International and Domestic Freight Traffic, January-August 2009
Non-metro Airport Modernisation - Goa	ICAO Region-Wise Traffic Forecast
Non-metro Airport Modernisation - Gujarat	IATA Global Traffic Growth Forecast

**“AIRPORT DEVELOPMENT IN INDIA” Report Order Form**

- I would like to purchase the “Airport Development in India” report priced at **Rs 40,000.**

I am enclosing a cheque / demand draft for Rs. \_\_\_\_\_, vide cheque / demand draft no. \_\_\_\_\_ drawn on \_\_\_\_\_ dated \_\_\_\_\_ in favour of **"India Infrastructure Publishing Pvt. Ltd."**

Signature

Name (Block Letters) \_\_\_\_\_

Designation \_\_\_\_\_

Company \_\_\_\_\_

Mailing Address \_\_\_\_\_

Telephone \_\_\_\_\_ Mobile \_\_\_\_\_

Fax \_\_\_\_\_

E-mail \_\_\_\_\_

**Wire transfer details:**

Beneficiary	India Infrastructure Publishing Pvt. Ltd.
Bank Name	<b>ABN AMRO BANK N.V.</b>
Address	<b>M-6, Hauz Khas, New Delhi-110016, India</b>
Account No.	<b>1050338</b>
Swift Code:	<b>ABNAINBBDEL</b>
IFSC Code:	<b>ABNA0100327</b>

**Contact details:**

**Priyanka Yadav, Information Products**  
**India Infrastructure Publishing Pvt. Ltd.**  
**B-17, Qutab Institutional Area, New Delhi-110016, India**  
**Tel: 91 11 46078356, 41034601, Fax: 91 11 26531196**  
**Mobile: 9971223069**  
**priyanka.yadav@indiainfrastructure.com**