While business aviation traffic in North America has picked up over the past year, the story for the rest of the world isn’t as rosy. Some regions of the industry are seeing signs of hope emerge, particularly internationally, because that’s where all the activity was in emerging markets going after these natural resources.

That said, FBO operators in Brazil, home to the world’s second largest fleet of business aircraft—last summer’s host of the World Cup—supporting an event as an opportunity to attract new customers. “The year was amazing, thanks to the FIFA World Cup,” said Cynthia Ferrer, managing director of operations for Lider Aviação, the country’s largest business aviation services provider. “We flew over 9,285 flights last year (4,285,910) as in 2003. We expect to see a total of 10,000 aircraft movements last year, and I would expect FBOs in this country to be handling more than 10% of operations over that span went up by 37 percent, to a record 790,832.”

According to Aboulafia, the situation presents a nearly complete recovery from 2008 and the start of the global economic downturn. Back then, hope for industry recovery lay in large-cabin jets and emerging markets such as the BRIC nations (Brazil, Russia, India, and China). This year, a North America-based recovery is fueling the industry, while each of the BRIC nations is experiencing changes that hamper business aviation growth.

BRC Growth Slows

While the decrease in oil prices might be having some effect on that, in Brazil, Russia, and China. According to analysts that make that assessment, Brazil, Russia, and China. According to analysts that make that assessment.

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The FBOs profits are tied not to fuel sales but to a la carte aircraft services, and a declining number of high-end aircraft handling a smaller fleet on the location’s bottom line.
Universal Aviation’s location at London Stansted has seen 10 percent more business over the past year, a boost the company attributes in part to its around-the-clock operations. “The main thing we tend to find that’s driving business at Stansted is that it is a 24/7 airport,” noted Jonathan Howells, Universal’s executive vice president for international operations. “The only other 24/7 airport in the London area is Luton, and we’re hearing from a lot of our customers that they’re finding Luton quite congested.”

Universal has been in operation at Stansted for more than 30 years, and its 10,712 sq-ft standalone facility underwent an extensive refurbishment in 2013. "You can build a Taj Mahal," Howells told AIN. "The challenge is that a lot of our customers really don’t spend very much time in our facility at all. They want to get from aircraft to car as quickly as possible, and the same in reverse.” Toward that end, passenger vehicles can meet arriving aircraft rampside, and be escorted through a secure gate.

The company attributes in part to its around-the-clock operations. “The main thing we tend to find that’s driving business at Stansted is that it is a 24/7 airport,” noted Jonathan Howells, Universal’s executive vice president for international operations. “The only other 24/7 airport in the London area is Luton, and we’re hearing from a lot of our customers that they’re finding Luton quite congested.”

The Universal FBO is one of five service providers at Stansted.

**ExecuJet Europe**

**Zurich, Switzerland**

8.9

ExecuJet operates 19 FBOs around the world, and AIN’s readers gave the highest rating to its facility at Zurich International Airport, which advanced by 1.4 points since the last survey. The company has had a presence there since 2003, when it took over the former Signature Flight Support/Zendex facility. The 5,000-sq-ft terminal features passenger and pilot lounges, crew briefing rooms, its own security staff...
CONTINUED FROM PAGE 22

and onsite customs and immigration service. The location’s 20,000-sq-ft hangar can shelter three large business jets such as a Falcon 7X simultaneously, along with two midsize jets. Aircraft parking is available directly in front of the FBO.

According to Mark Abbott, the company’s group FBO director, traffic at the location grew by better than 5 percent over the past year, fueled in part by the annual boost from the World Economic Forum held in nearby Davos. During the event the ExecuJet staff handled more than 400 movements at Zurich and nearby Dübendorf military airfield, which was pressed into service to compensate for parking limitations at Zurich. One of three FBOs on the field, the Shell-branded ExecuJet facility operates a trio of 20,000-liter jet-A refuelers dedicated to serving its customers. The location is normally open from 5 a.m. until 10:45 p.m. every day, as the airport closes at night.

Nicole Gut, the company’s director of European FBOs, noted that budget-conscious customers are becoming more evident. “The FBO business has become very price driven and the client is asking for more service at less cost,” she told AIN. “This seems to be a trend in all our European locations.”

All of the company’s FBOs are in the process of complying with the International Standard for Business Aviation Handlers (IS-BAH). Gut added, with Zurich and Berlin expected to achieve certification before the end of next month.

Aviapartner Executive

Nice Cote d’Azur, France

8.7

Travelers to Europe’s third-busiest business aviation airport, Nice Cote d’Azur, are virtually assured of being well taken care of, as all three of its FBOs earned recognition in this year’s international FBO survey. Highest scoring among them in this year’s voting was Aviapartner Executive, which shares an airport-provided general aviation terminal with its two competitors. With those constraints, Aviapartner distinguished itself in the two survey categories that are exclusive of its facility’s physical structure: its line service and customer service representatives, earning 9.0 scores in each.

According to Pascal Matha, the facility’s executive manager, the company, which operates the largest FBO network in France with nine locations, recently instituted new CSR training at Nice. Personalized service from its multicultural, multilingual team (58 full-time staff in the peak summer months) is available in French, English, Russian, Arabic, German, Italian and Portuguese. Its CSRs are supported by key account managers for the Russian and Middle Eastern markets who can adapt to and anticipate customer requests, such as helicopter reservations. Customs and immigration service is available at the 4,000-sq-ft terminal, more than one third of which is devoted to an executive passenger lounge (with a children’s corner offering pleasant diversions), and a smaller, more private lounge. Crew needs are well accommodated for as well, with three separate lounges/work areas, including a quiet sleep room.

The location’s line service staff handles approximately 5,000 arrivals a year, and according to Matha the company is the only handler at Nice with the ramp equipment to handle any type of aircraft. The FBO, which is open 24/7, recently upgraded its airspace transportation fleet to all new Mercedes vehicles, and last month saw the arrival of a new dedicated 9,500-gallon jet-A refueling truck. The location is home to four private jets, based in a separate private hangar.

Jet Aviation

Geneva, Switzerland

8.7

While Jet Aviation conducted a major refurbishment and expansion of its Geneva facility in 2013, the company says it is continually working to enhance the experience there for its customers, with further improvements planned for the crew lounge, adding more work space and expanding it to face the tarmac. The terminal currently offers three private passenger lounges and a bathroom/shower facility for passengers, while crew have a dedicated lounge with separate nook room and massage chairs, along with a private bathroom with showers.

A presence at the airport for more than 45 years, Jet Aviation handled approximately 8,000 movements last year, more than the previous year’s tally despite the overall decline in business aviation traffic to Geneva, said general manager Joao Martins. So far this year, Martins describes traffic as consistent with 2014, but he concedes the company has had to offer a lot of promotions to maintain that pace. There are 65 parking positions at Geneva but the actual number of aircraft is virtually as accommodated depends on the size of the aircraft. The company noted that parking restrictions and prior permission required (PPR) for landing remain issues there for users.

Jet Aviation can handle virtually any aircraft up to and including a 747, and has more than 44,400 sq ft of hangar space. “We see a trend with customers moving to larger aircraft,” said Martins. “They are also asking for more services and higher service standards.”

The FBO has 20 employees and is staffed from 5:30 a.m. until 10:30 p.m. Its Part 145 service station was awarded for as well, with three separate lounges/work areas, including a quiet sleep room.

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Aviapartner Executive, Nice

Jet Aviation, Geneva

Other Frequent FBOs in the Eastern Hemisphere

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* These FBOs, listed alphabetically by name, received nearly enough responses to qualify their ratings for this report.

FBOs Showing the Largest Increase in Overall Average from 2014 to 2015

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<thead>
<tr>
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* Ties listed alphabetically by FBO
CONTINUED FROM PAGE 24

TAG Aviation
Geneva, Switzerland

8.6

TAG Aviation’s Geneva location improved on its score from last year’s survey, as the company completed refurbishment of the facility in November. Along with the addition of 2,700 sq ft of space, the FBO now features two separate entrances for passengers and crew, which provides a smooth and discrete travel experience through the 6,575-sq-ft terminal, according to Franck Madignier, president of TAG Aviation Engineering and FBO Services.

The newly redesigned building has three passenger lounges, a pilot lounge with sneeze room, 12-seat AV-equipped conference room and a crew kitchen. Among its amenities are concierge service for ground transportation and accommodations, along with onsite Swiss and French customs and immigration. EASA and FAA Part 145 maintenance is available from the 65,000-sq-ft hangar. The FBO is home to approximately 20 aircraft ranging from Citations to a Global and claims more than half of the business aviation traffic among the four service providers at the airport, a share that worked out to more than 18,000 movements last year.

“Despite the reconfiguration phase of our facility, we have been able to keep the same market but have faced a slight decrease in traffic, partly because of slots and parking restraints,” noted Madignier, who added the company is part of a working group at the airport attempting to improve access there for business aircraft.

Madignier noted that the location is seeing a greater percentage of large-cabin aircraft of late. Many of these arrive from destinations in Europe, and the numbers are up from Asia, the Middle East and the Commonwealth of Independent States, he said. To accommodate them, the facility has 10 acres of ramp parking.

Dassault Falcon Service
Paris Le Bourget, France

8.3

With seven (soon to be eight) service providers operating at Paris’s dedicated business aviation airport, the competition is certainly fierce, as four locations there earned scores of 8.1 or higher in this year’s AIN International FBO Survey, but with nearly a half century of operations at Le Bourget, Dassault Falcon Service (DFS) trumps them all in terms of seniority.

Starting from the early days of the company’s business jets, the facility has grown to include a 16,000-sq-ft terminal with a passenger lounge offering a panoramic view of the apron and direct access to the location’s four acres of ramp space. Recently added was a separate entrance for the FBO’s customers, along with a secure car parking area for passengers and crew. This year, the company plans to renovate its crew lounge, adding showers and a sneeze room. According to Bertrand d’Yvoire, head of Dassault’s airline and FBO operations, “Our refurbishment project will modernize our FBO and make it more efficient, while keeping the classical touch that is highly appreciated by our customers.”

Over the past year traffic at the airport was flat compared with 2013, but the FBO maintained its market share of approximately 10 percent (6,000 movements) of the airport’s annual traffic. Like most of the highly rated international FBOs, the location is seeing more large-cabin aircraft. “It should continue in this direction in the context of globalization and the higher performance of new business jets,” noted d’Yvoire.

The airport is open for takeoffs from 6 a.m. until 10:15 p.m., but landings are permitted around the clock. DFS is staffed from 6 a.m. until midnight, with call-out available after hours.

The location has 65,000 sq ft of hangar space and is home to 11 aircraft, seven of them Falcons available for charter. Its maintenance center is one of the world’s largest dedicated Falcon repair facilities, employing 40 technicians, and can perform virtually any maintenance on any Dassault aircraft.

Hong Kong Business Aviation Centre
Hong Kong International Airport, Hong Kong

8.3

The only Asian FBO to rank among the top international locations in this year’s survey, Hong Kong Business Aviation Centre (HKBAC) is the sole FBO on Hong Kong International Airport, and its score from AIN readers climbed to 8.3 this year from 7.9 last year. The FBO’s business and services have been growing in tandem with the growth of Hong Kong itself since the facility opened in 1998, according to general manager Madonna Fung. Last year the FBO recorded double-digit growth in flight movements, and that level of activity has continued thus far into this year.

HKBAC is open 24/7 and was the first FBO in Asia to offer one-stop dedicated onsite customs, immigration and quarantine services. The approximately 67,000-sq-ft facility near the airport’s south runway includes executive lounges, conference facilities, concierge and catering services as well as a newly expanded crew lounge and flight planning center where crewmembers can prepare, hold meetings and rest.

As it heeds the ever-increasing importance of superior customer service, the company cites its comprehensively trained staff as its biggest asset, especially when it comes to flexibility. “What makes our services unusual is that we entertain requests for ad hoc arrangements on short notice,” Fung told AIN. “We also file flight plans for customers and provide coordinated one-stop services such as maintenance and special catering arrangements.” Among the administrative services provided are arranging Chinese visas and landing permit applications.

The facility is home to more than 80 aircraft, and its three hangars encompassing more than 100,000 sq ft can shelter aircraft up to ACJs. For aircraft parking, HKBAC’s apron covers 12 acres, and the company is currently concluding discussions with the airport authority to add even more capacity. Among the further improvements is the addition of fuel hydrants on the apron, which are awaiting final approval from the airport’s fire services department. According to Fung, “the new hydrants will facilitate a timely customer-demand-centric into-plane service to accommodate dynamic business trip needs.”

Landmark Aviation
Paris Le Bourget, France

8.3

Last year was a busy year at Le Bourget for Landmark Aviation. The Houston-based service provider moved from the terminal it had occupied since 2006 into a brand-new building in June. Located on the main avenue of the airport, the $4.1 million facility, just south of Landmark’s former structure and nearly triple its size, offers more privacy for customers, including a conference rooms, larger passenger lounges, sneeze room in the pilots’ lounge and a prayer room. Unlike the old 3,700-sq-ft terminal (which will be retained to provide client office space), passenger and baggage screening services in the new terminal will be discrete and unobtrusive.

Last year the location saw a 10-percent upswing in movements over 2013, a trend it expects will continue through this year, according to general manager Denis Bourgeois.
Landmark Le Bourget has a staff of 45 and is open every day from 5 a.m. until 11 p.m. with on-request fueling service available 24 hours a day. The company manages Esso’s fuel farm and tanker trucks and fuels a large portion of aircraft at the airport.

Bourgois added, “The industry is starting to focus more and more on security, safety and customer service.” Landmark’s European locations participate in NATSA Safety 1st line service training.

The location offers nearly five acres of ramp parking. One thing retained from the earlier facility is its 43,000-sq-ft heated hangar, which can shelter large-cabin business jets. Like most of the FBOs at Le Bourget, Landmark offers on-demand customs and immigration formalities.

Swissport
Nice Côte d’Azur International Airport, France

Swissport has been providing FBO services through its Swissport Executive Aviation brand since 2001, and its facility at Nice Côte d’Azur Airport (LFMN), operated as a joint venture with Universal Weather and Aviation, was the company’s first private aviation location, followed later by a wholly owned facility in Cork, Ireland. The company also operates PrivatAir FBOs at Zurich, Geneva and Munich under a joint venture with PrivatAir.

One of three business aviation service providers at LFMN, Swissport claims approximately one third of the traffic, which totaled nearly 11,000 movements according to recently named FBO director Rochdi Touri. The compact facility, at approximately 4,000 sq ft, is the same size as its competitors and contains a passenger lounge with a tarmac view, an operations center, six-seat AV-equipped conference room and pilots’ lounge. A crew snooze room is planned. The facility is open 24/7.

None of the FBOs at LFMN has its own dedicated ramp or aircraft parking area, with spaces first-come first-served among the three providers. Likewise, none of the providers has its own hangars. “The airport allocates several parking spaces for general aviation, and then when it starts to get too busy, they allocate commercial aircraft parking,” said deputy FBO director Rafaël Fromentin. “Today’s aircraft are becoming larger and larger so it can be problematic at times,” he added, noting peak periods of airport activity such as during the Monaco Formula One race. During the peak summer season, the facility’s staff nearly doubles to 62 employees from 34. The company noted a strong start to this year fueled in part by a resurgence of U.S. traffic, and it expects to see a solid year despite the continuing crisis in Ukraine, which is limiting private flights from the region.

Universal Aviation

Paris Le Bourget, France

To celebrate 25 years at Le Bourget, Universal Aviation completed a $250,000 refurbishment of its 5,400-sq-ft facility last year, staging an official ribbon cutting in April. “We recognize the strategic importance Paris serves as a destination for business aviation operators and also the many ground support options they have at Le Bourget,” said Jonathan Howells, the company’s senior vice president for international operations. “As part of our ongoing program to further enhance our clients’ experience on the ground at all of our locations, we have updated our historic FBO at Le Bourget with features and amenities our clients told us they wanted.” Those improvements included renovated crew and passenger lounges, a business center, client meeting rooms and private passenger-screening facilities. Reflecting the many cultures and nationalities that converge on Paris, the FBO offers 1,947 digital newspaper titles in 57 languages from 97 countries. A prayer room is also available.

The location, which is open from 8:30 a.m. until 8:30 p.m. (after hours by callout), also added 130,000 sq ft of ramp parking space over the past year, bringing its total to more than seven acres. Universal’s 32,000-sq-ft heated hangar can accommodate a pair of BBJs simultaneously, and it offers rampside customs and immigration clearance as well as UAir contract fuel. Like all of the company’s 13 FBOs, it participates in NATSA Safety 1st line service training as well as Universal’s own proprietary safety training program.

Universal’s catering subsidiary, Air Culinaire, operates its regional kitchen at Le Bourget, and representatives can meet arriving flights to arrange orders from an extensive menu, including special requests, with the crews.

Harrods Aviation
London Luton, UK

Sharing the same name as the legendary London department store is no coincidence for Harrods Aviation, which has been part of the same company for the past 20 years. It operates FBOs at both London Luton and London Stansted and, according to sales and marketing director Will Holroyd, takes some cues from its famous retail sibling. “Our FBOs, as you would expect from Harrods, provide the highest level of customer amenities,” he told AIN. At its Luton base, the company just concluded a year-long $600,000 interior redesign and upgrade. As part of the renovation, the lounges were refurbished with new furnishings and fittings, while the passenger screening areas were relocated from their original position in the passenger lounge to a more discreet location to enhance the privacy of arriving and departing passengers. New guest and baggage screening equipment was also added to ensure a swift departure on commercial flights.

The company saw a slight uptick in business aviation traffic at Luton year-over-year and is maintaining its market share of approximately 40 percent of that business, according to Holroyd, who noted the larger size of aircraft frequenting the facility. “To meet the demand to handle larger aircraft and [their higher passenger count], we have purchased a new airside mobile baggage screening vehicle,” he said. Though the facility has 59,000 sq ft of hangar space—enough to accommodate aircraft up to a 757—and five acres of parking, Holroyd acknowledges that the influx of larger aircraft comes at a cost. “There is not unlimited space at Luton, and with larger aircraft parking for longer periods on the ramp, the number of aircraft we are physically able to handle drops,” he said. “In years to come, and as locations like Luton remain as popular as ever for their proximity to London, aircraft operators will have to look elsewhere.”

As Air Elite Global Network members, Harrods Aviation’s entire staff, numbering more than 250 at the two locations, attended Ritz-Carlton customer service training over the past year.

Signature Flight Support
Paris Le Bourget, France

The fourth FBO at Europe’s most active business aviation hub to earn recognition by AIN’s readers this year, Signature Flight Support is one of the region’s most active business aviation hubs.
CONTINUES FROM PAGE 29

the largest hangarage providers at Le Bourget with more than 145,000 sq ft of storage spread over nine heated structures that can accommodate aircraft up to a Global. The location has nearly 10 acres of dedicated rampspace, customs and immigration clearance.

To accommodate jetliners up to 747s, along with the ground handling equipment to service them. Signature also owns a de-icing truck, making it independent in winter weather. Its terminal is open from 6 a.m. until 10 p.m. (call-out service available) and offers 24/7 rampside customs and immigration clearance.

Courtesey car service whisks customers from the ramp directly to the customized security area for passenger and baggage screening, en route to the passenger lounges, which feature en-suite bathrooms and shower facilities. The air-conditioned terminal has an executive bar area, AV-equipped conference rooms with seating for up to 30 people, a private prayer room, individual crew lounge rooms and pilots’ work lounge with large-screen television and cable programming. Dedicated car parking is available for customers and crew. There is also a separate limousine drivers’ lounge and onsite catering. Fuel is available on request from Exxon, Shell or Total.

Hawker Pacific Flight Centre
Sydney Kingsford Smith International, Australia

8.0

Proof that FBO facilities don’t have to be large to gain recognition is Hawker Pacific’s FBO at Sydney Kingsford Smith International Airport in Australia. While the company has had a maintenance presence at the airport for the past three decades, its FBO—12 years old—is the oldest among the company’s seven bases scattered throughout Australia, and has a staff of just five full-time and 10 part-time workers. Hawker Pacific recently cosmetically refreshed the interior of its terminal with new furniture, paint and carpeting.

Though the company has long wanted to replace its 30-year-old structure, it has been hamstring by the private airport authority’s ever-fluctuating 20-Year Master Plan. “Every five years at least we get told that we’re going to be relocated over to another part of the airport and we’re going to have to build a new facility and so on,” said Graham Owen, the company’s vice president of flight services for Australia. “We haven’t been able to invest in the current facility because we always sort of think we have a five-year horizon when we’re going to be moved out, so it’s been a bit difficult.”

Domestic operations have been fairly flat over the past year, according to Owen, who added that as the FBO business in Australia is still relatively young, only recently are most domestic operators beginning to accept using an FBO rather than self-handle. International traffic, on the other hand, has risen by more than 15 percent over the past five years, with last year’s G20 Summit in Brisbane providing a sizeable boost. Onsite customs and immigration clearance is available. Recently, the company was awarded a government airport handling contract at all four of its bases in Australia. The location has an 11,000-sq-ft hangar that can accommodate the pair of Challenger 604s and a Cita-
tion III that are based there. The location can handle any aircraft up to and including a private 747. “Because fuel is not a major earner for Australian FBOs, the key differentiator is customer service,” said Owen. Indeed, the location’s highest score was for its CSR staff.

Landmark Aviation
Nice Cote d’Azur, France

8.0

The third service provider at Nice Cote d’Azur Airport (LFMN) is Landmark Aviation, which has had a presence at the French Riviera gateway since 2008. Like its competitors, the company operates one third of the airport-provided general aviation terminal. While compact, the location offers everything required of an FBO, including pilots’ lounge, flight planning and passenger lounge, yet in an effort to allocate more space to enhance its customers’ experience, Landmark over the past year relocated some of its accounting staff to a remote facility. The company says it is working with the airport on an expansion plan to make more space for passengers and crew.

With no hangar space and a common ramp, service providers at the airport exist mainly in transient traffic, and Landmark claims approximately 40 percent of it at Nice. “We handled 6,653 aircraft last year, which was up 7.6 percent from 2013,” said Cy Farmer, the company’s vice president for international operations, indicating an increase in market share, as business for the airport overall was rather flat year-over-year. According to industry data provider WingX Advance, LFMN saw an uptick of 3.1 percent in fuel uplift last year, for a total of 9.5 million gallons of jet-A, and for the past several years Landmark has operated its own pair of refuellers at the airport, which gives it more control over service quality and wait time for departing customers.

Before this year the facility existed as a joint venture with MAP Handling Executive, but now Landmark owns 100 percent of the FBO. The facility has a crew of 45 and is open 24/7. Given the area’s status as a summer playground for the wealthiest of patrons, the loca-
tion’s concierge service regularly finds itself providing services such as helicopter transfers and yachts charters, along with the more mundane hotel and limousine reservations.