



2015 • Europe, Middle East, Asia, Africa

AIN FBO SURVEY

Data compiled by David Leach; narrative by Curt Epstein

Hawker Pacific Flight Centre, Sydney

In many regions traffic remains stalled, but glimmers of hope emerge

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 clear, with activity in many regions remaining mired. "We've become a delinked market," noted Richard Aboulafia, vice president for analysis at Teal Group. "The U.S. is doing acceptably well, and elsewhere [activity is] disappointing." Over the past year, usage of U.S.-registered business jets helped to bolster the international market, according to FAA statistics. While the U.S. business jet fleet saw approximately the same number of operations last year (4,285,910) as in 2003 (4,235,910) the percentage of international operations over that span went up by 37 percent, to a record 708,872 last year.

According to Aboulafia, the situation at present represents a nearly complete reversal 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 American-based recovery is fueling the industry, while each of the BRIC nations is experiencing conditions that hamper business aviation growth.

BRIC Growth Slows

The recent downturn in oil prices might be having some effect on that, in Brazil, Russia and China. According to analysis by Bank of America Merrill Lynch Global Research, one-fifth of the large-cabin business jet fleet worldwide may have been funded by the oil industry, with approximately half of the in-service fleet based outside the U.S. "In my view, utilization of big-cabin jets is just going to come down," noted industry analyst Brian Foley, president of Brian Foley Associates,

"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—saw last summer's hosting of the world's largest sporting event as an opportunity to attract new customers. "The last year was atypical, thanks to FIFA World Cup," said Cynthia de Oliveira, managing director of operations for Lider Aviação, the country's largest business aviation services provider. "We noticed in general a decrease of 10 percent on domestic flights and an increase of 17

percent on international flights."

Overall during the tournament, 2,839 aircraft from domestic locations were granted 21,537 slots; and 635 foreign aircraft were granted 1,518 slots, a tally that is not likely to be exceeded until next year's Summer Olympic Games. Yet infrastructure—and other—challenges remain. "Look at Brazil and its problems right now. [They are] oil-related," Foley told AIN. "As such I would expect FBOs in that country to be feeling the effects already, and it will certainly continue this year."

By contrast, Foley expects traffic at Mexican FBOs to climb, as a result of their proximity to the U.S. "Even though Mexico has a strong oil component, it's also a fact that the U.S. is Mexico's strongest trading partner and as such it will be

drawing on the coat tails of the U.S. and have a pretty good go at it this year."

In Europe, the industry has certainly been hampered by geopolitics. While Russia had been a growth area, business aviation traffic between it and Europe is down by 8 percent over the past year, according to statistics provided by Eurocontrol. That decline is attributed in part to the disagreements over the handling of the crisis in Ukraine. "The ones that will feel it the most in the business aviation world will be the charter operators that used to have a nice healthy business going back and forth between someplace in Europe and Russia and the FBOs," Foley said. "Those were pretty long trips in pretty big airplanes that needed a lot of services." Unlike at North American FBOs, at most international

FBOs profits are tied not to fuel sales but to à la carte aircraft services, and a declining volume of aircraft handled takes a toll on the location's bottom line.

Several factors are causing fluctuations in traffic levels at Italian airports, according to Carlo Panerai, president of Florence-based FBO and charter company Delta Aerotaxi and founder of the ItalyFBO group. "We have seen an 18- to 20-percent reduction in the number of Russian aircraft, but at the same time traffic from the U.S. is surging back," he told AIN. He indicated that intra-European traffic levels have remained about the same overall.

European business aviation traffic declined by half a percentage point over the past year, according to Eurocontrol, despite a fall-off of nearly 40 percent in 2014 in Ukraine, as operators give the nation a wide berth after the downing of a jetliner last summer. Among Europe's top 50 business aviation airports, 26 saw departures decline year-over-year and

24 saw gains, according to data compiled by industry information provider WingX Advance. Indeed, even in a sample size as small as the top five airports, Le Bourget and London Luton saw slight gains in traffic, while Geneva and Moscow Vnukovo saw declines. Nice Cote d'Azur remained virtually static last year.

The Picture for China and Africa

For the remainder of the world, the picture varies depending on the source, as trip-support providers such as Universal Weather & Aviation and UAS note different regional strengths. "Traffic in the Americas is steady; Europe is steady, but travel to Africa and the Middle East is slightly elevated," noted UAS executive vice president Jay Husary, who said his company's customers seem to be flying more this year. "The biggest growth, however, is clearly in Southeast Asia." While Asia is starting from a much lower level of activity, according to WingX all 10 of the busiest business aviation destinations

logged gains in their international traffic, led in volume by Hong Kong International, up 17.8 percent year-over-year along with a 26-percent rise in fuel uptake.

While Universal reported handling 10 percent more flights to China, political concerns there have curtailed domestic use of private aircraft over the past year. "We're seeing a bit of a quieting down with China at the moment," said Jonathan Howells, Universal's senior vice president, international. "There are some campaigns from the Chinese government at the moment that make ownership of business aircraft a bit challenging for some owners, so they are tending not to fly or to fly commercially." The country is still seeing growth in its FBO infrastructure, with Deer Jet, the country's largest private aviation company, adding several locations over the past year.

For Universal, it is Africa that is seeing strength. "We've seen at least 10 percent more traffic into the African continent," Howells told AIN. "A lot of the oil companies were driving that; obviously... the

price of oil will really have impacted some of that traffic and some of those locations, but Africa has been a positive growth area." Howells added that proper ground handling on the continent remains a challenge.

"Customers based in the U.S. are often surprised by how little FBO infrastructure exists in developing countries," said UAS's Husary. "However, we keep seeing new, bigger and more beautiful FBOs being built around the globe, a trend that will continue."

While no Middle Eastern FBOs received enough evaluations for consideration in this year's survey, traffic to the region remained steady, with Israel's Ben Gurion Airport seeing the most international departures (nearly 3,000, according to WingX). Dubai International Airport's approximately 800 departures to Europe and North America last year represented a gain of 130 percent over 2013 numbers. "I don't think there is any rapid growth going on," said Howells of the region. "I don't think there is any rapid decline there at the moment. Flat is the new growth, right?"

FBO SURVEY RULES AND METHODOLOGY

This report of AIN's 2015 FBO survey covers fixed-base operations in Europe, the Middle East, Asia and Africa—in other words, the Eastern Hemisphere. Last month's report covered FBOs in the Western Hemisphere.

AIN has been conducting surveys asking about the service that FBOs provide their customers and publishing reports of the results from these surveys since 1981. Initially, AIN sent out a paper survey questionnaire by mail to qualified subscribers in the U.S., these being pilots, flight attendants and dispatchers—the people who use or make arrangements with FBOs. In later years, qualified subscribers in the rest of North America and the rest of the world were added.

In 2006, AIN moved the FBO survey online. AIN has continued to add more and more FBOs each year and now offers our respondents a comprehensive list of more than 4,500 FBOs worldwide. Via e-mail and announcements in AIN's e-newsletters, AIN invited all qualified subscribers to participate in the survey. Each invitee receives a discrete code to enter the survey website, to prevent individuals from filling out the questionnaire more than once.

The questionnaire asks readers to evaluate FBOs they visited the previous year in five categories: line service; passenger amenities; pilot amenities; facilities; and customer service representatives (CSRs). For each of these categories, the participant is asked to assign a number from 1 to 10, one being the lowest and 10 being the highest.

To arrive at the averages for the categories, each FBO's ratings in each of the five categories are added separately and the resulting five sums are then divided by the total number of responses received for each respective category.

An FBO's overall average is calculated by adding all the individual category ratings received by that FBO and dividing the resulting sum by the total number of all category ratings received by the FBO. In other words, if a particular FBO was evaluated by 50 people (and assuming that all these 50 evaluators gave that FBO a rating in each of the five categories), then the FBO would receive a total of 250 category ratings. These 250 category ratings are added together and then the sum is divided by 250 to arrive at the overall average for this FBO.

—D.L.

Top-ranked FBOs

by Curt Epstein

While the scores for international FBOs tend to lag those given to North American locations, the service providers most highly regarded by AIN's readership are starting to close the gap, with two scoring 9.0 or higher in this year's survey. In all, 15 locations earned overall ratings of 8.0.

TAG Farnborough

London, UK

9.1

TAG Farnborough once again landed on the top of the hill in this year's international FBO survey and is the only international FBO to receive an overall score higher than nine, achieving a rating of 9.1, as it has the last two years. Given that TAG owns the dedicated business aviation airport, its FBO is the only service provider there, and the facility handled nearly 25,000 aircraft movements last year, a gain of 5.6 percent, according to airport CEO Brandon O'Reilly. His numbers suggest that TAG Farnborough is serving more than a third of the entire

London business aviation market. This year has gotten off to a fast start at Farnborough as well, with 42 percent more bizliner movements than in the first two months of last year, continuing a trend O'Reilly has noted over the past few years; visits by ultra-long-range business jets are up by 9 percent.

The location is home to 45 aircraft, sheltered in two hangars providing 240,000 sq ft of space.

TAG Farnborough earned top scores this year in both the passenger and crew amenity categories, offering concierge service, direct ramp access for customer vehicles, crew lounge with snooze rooms, conference rooms and an onsite hotel. Recently introduced is "drive-through" immigration clearance for those flights that are not met upon landing by a Border Force agent.



TAG Farnborough

The location also earned a 9.4 for its facilities, the highest category score awarded by our readers this year. In an effort to dedicate even more space within the terminal to customers, over the past year the location's administrative staff moved to a new location within the Farnborough Business Park. The reclaimed 12,000 sq ft of space will be used for upgrades such as additional lounge space and a crew gymnasium. The company is also in the process of introducing a "fast track" airport

entrance for the exclusive use of passengers and crew. "The ongoing investment underpins our commitment to enhance facilities and services, maintaining our position as Europe's leading business aviation airport," O'Reilly told AIN. Since taking over control of the airfield from the UK's Department of Defense more than a decade ago, TAG has invested in excess of \$150 million in infrastructure at Farnborough.

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Universal Aviation, Stansted

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Universal Aviation

London Stansted, UK

9.0

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. The company has no immediate plans to expand on those recent improvements. "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.

This past year the location doubled its ramp space to approximately 40,000 sq

ft. Line service staff at Stansted undergo both NATA Safety 1st line service training as well as in-house training to Universal's ground handling operations manual. That attention to safety clearly was noticed by AIN's readership, which awarded the location a 9.4 in line service, the highest individual category score among international FBOs this year. (TAG Aviation received a 9.4 for facilities.) The location, which is also home to Universal's European operations center, garnered the highest individual score for customer service representatives. Through its Air Culinaire subsidiary, Universal provides private aviation catering to all the area airports from a kitchen at the Stansted facility.

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/Zimex facility. The 5,000-sq-ft terminal features passenger and pilot lounges, crew briefing rooms, its own security staff

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ExecuJet Europe, Zurich

TOP AIRPORTS FOR DEPARTURES AND FUEL UPLIFT

Airport	Departures	Percent change	Fuel uplift (U.S. gallons)	Percent change
North America				
Teterboro, Teterboro, N.J.	66,700	4.9%	36,828,000	6.5%
Love Field, Dallas	30,800	6.2%	9,973,000	4.4%
Westchester County, White Plains, N.Y.	30,300	1.7%	14,419,000	3.8%
William Hobby, Houston	29,700	5.0%	9,642,000	6.8%
Dulles Int'l, Washington, D.C.	25,800	-2.7%	10,527,000	0.9%
Palm Beach Int'l, West Palm Beach, Fla.	25,800	3.8%	11,730,000	3.5%
McCarran Int'l, Las Vegas	25,000	3.3%	10,180,000	2.9%
Centennial, Denver	24,400	8.8%	7,716,000	13.4%
De-Kalb Peachtree, Atlanta	23,100	4.6%	5,627,000	4.6%
Van Nuys, Van Nuys, Calif.	21,300	14.3%	10,917,000	17.3%
Europe				
Le Bourget, Paris, France	25,800	1.7%	14,299,000	0.6%
Geneva, Geneva, Switzerland	17,600	-3.5%	8,392,000	-6.1%
Nice Cote d'Azur, Nice, France	15,800	0.4%	9,522,000	3.1%
Luton, England	13,900	6.3%	13,285,000	9.5%
Vnukovo, Moscow, Russia	12,400	-2.6%	13,397,000	-2.6%
Zurich, Switzerland	11,100	-1.5%	5,399,000	10.1%
Farnborough, England	11,400	7.8%	8,240,000	7.5%
Linate Int'l, Milan, Italy	10,000	1.1%	3,580,000	8.1%
Ciampino-G.B. Pastine Int'l, Plena, Italy	8,800	-1.6%	3,787,000	1.3%
Vienna Schwechat, Austria	7,800	0.4%	2,937,000	3.1%
Latin America				
Lynden Pindling Int'l, Nassau, Bahamas	7,500	6.3%	3,240,700	14.1%
Marsh Harbour Int'l, Abaco, Bahamas	2,500	15.6%	652,400	28.7%
Providenciales Int'l, Turks and Caicos	2,400	13.3%	1,580,100	21.4%
Simon Bolivar Int'l, Caracas, Venezuela	2,200	-8.4%	2,040,900	10.3%
Los Cabos Int'l, Los Cabos, Mexico	2,200	-14.9%	1,478,100	-14.1%
L.F. Wade Int'l, Bermuda	2,100	6.8%	1,681,900	17.5%
Princess Juliana Int'l, Saint Maarten	2,100	6.8%	2,466,000	6.7%
Luis Munoz Martin Int'l, San Juan, Puerto Rico	1,700	10.4%	1,130,900	4.3%
Adolfo Lopez Mateos Int'l, Toluca, Mexico	1,600	12.8%	1,630,400	106%
Luis Ribas Dominicci, San Juan, Puerto Rico	1,500	6.5%	415,000	9.9%
Middle East				
Ben Gurion, Tel Aviv, Israel	2,800	9.3%	1,005,000	21.3%
Beirut Rafic Hariri Int'l, Beirut, Lebanon	2,000	3.6%	484,000	4.6%
King Khalid Int'l, Riyadh, Saudi Arabia	1,300	16.3%	1,081,000	15.6%
King Abdul Aziz Int'l, Jeddah, Saudi Arabia	1,300	-3.9%	540,000	0.9%
Dubai Int'l, Dubai, United Arab Emirates	800	130.1%	1,090,000	128.4%
Al Maktoum Int'l, Dubai, United Arab Emirates	700	-13.3%	554,000	-17.0%
Nevatim AB Be'er Sheva, Israel	700	-42.2%	245,000	-21.3%
Abu Dhabi Bateen, Abu Dhabi, United Arab Emirates	600	-18.5%	468,000	-30.4%
Hamad Int'l, Doha, Qatar	500	16.3%	1,108,000	15.4%
Marka Int'l, Amman, Jordan	500	4.2%	156,000	0.7%
Asia-Pacific				
Capital, Beijing, China	300	1.1%	1,246,800	7.0%
Hong Kong Int'l, Hong Kong	200	17.8%	1,186,700	26.0%
Haneda Int'l, Tokyo, Japan	200	7.0%	995,100	4.5%
Indira Gandhi Int'l, New Delhi, India	200	5.7%	596,100	-9.5%
Ibrahim Nasir Int'l, Maldives	100	39.4%	671,700	60.1%
Chhatrapati Shivaji Int'l, Mumbai, India	100	10.5%	518,900	18.2%
Pudong Int'l, Shanghai, China	100	8.2%	500,400	17.4%
Narita Int'l, Tokyo, Japan	100	6.1%	376,900	12.7%
Kansai Int'l, Osaka, Japan	100	22.4%	314,400	34.1%
Gimpo Int'l, Seoul South Korea	100	21.6%	291,800	27.1%

Source: WingX Advance

ABOVE & BEYOND

AIN's survey asked respondents to identify specific employees or teams who routinely go above and beyond when it comes to customer service. The four people below were listed repeatedly. View the full list at ainonline.com/above-and-beyond-fbo-2015.

Person	FBO	Airport Code
Dick Smart	Platinum Business Aviation Centre	YBCG
Entire Staff	Signature Flight Support	EDDM
Roj Kulnaratana	MJets FBO	VTBD
Fabrice Malingre	Landmark Aviation	LFPB

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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 accounted 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 airside 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 crews have a dedicated lounge with separate snooze 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 that can be 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.

The FBO can handle virtually any aircraft up to and including a 747, and has more than 44,000 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 is authorized to work on most Gulfstreams, the BBJ, Global Express, Hawkers, Falcon 50/900/2000 series, Citation 550/560/XL/XLS and the Nextant 400XTi, and provides 24/7 AOG service.

Other Frequented FBOs in the Eastern Hemisphere

FBO	Airport	Airport Code	City
Abelag Aviation	Brussels National	EBBR	Brussels
Business Flight Center	Helsinki-Vantaa	EFHK	Helsinki
Cannes Airport Handling	Cannes-Mandelieu	LFMD	Cannes
Capital Jet/CJet	Beijing Capital International	ZBAA	Beijing
Corporate Air Service (Delta Aerotaxi)	Florence Airport, Peretola	LIRQ	Florence
ExecuJet Middle East	Al Maktoum International	OMDW	Dubai
ExecuJet Middle East	Dubai International	OMDB	Dubai
Grafair Jet Center	Stockholm City/Bromma	ESSB	Stockholm
Jet Aviation	Dubai International	OMDB	Dubai
Jet Aviation	Dusseldorf International	EDDL	Dusseldorf
KLM Jet Centre	Amsterdam Schiphol	EHAM	Amsterdam
MJets FBO	Don Mueang International	VTBD	Bangkok
Signature Flight Support	Munich	EDDM	Munich
Universal Aviation	Shannon	EINN	Shannon
Universal Aviation	Sydney Kingsford Smith	YSSY	Sydney

* 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

FBO	Airport	Airport Code	Overall Average 2015	Overall Average 2014	Change 2015-2014
ExecuJet Europe	Zurich	LSZH	8.9	7.5	1.4
Swissport Executive	Nice Cote D'Azur Int'l	LFMN	8.3	7.4	0.9
Signature Flight Support	Paris Le Bourget	LFPB	8.1	7.5	0.6
Hong Kong Business Aviation Centre	Hong Kong Int'l	VHHH	8.3	7.9	0.4
Dassault Falcon Service	Paris Le Bourget	LFPB	8.3	8.0	0.3
Landmark Aviation	Paris Le Bourget	LFPB	8.3	8.0	0.3

* Ties listed alphabetically by FBO

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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 snooze room, 12-seat A/V-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 snooze 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.

Hong Kong Business Aviation Centre



Landmark Aviation, Le Bourget



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 room, larger passenger lounges, snooze room in the pilots' lounge and a prayer room. Unlike in 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 Bourgois.

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TAG Aviation, Geneva



Dassault Falcon Service, Le Bourget



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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.

Bourgeois added, "The industry is starting to focus more and more on security, safety and customer service." Landmark's European locations participate in NATA 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 Cote d'Azur International Airport, France

8.3

Swissport has been providing FBO services through its Swissport Executive Aviation brand since 2001, and its facility at Nice Cote 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 PrivatPort 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 A/V-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



Swissport, Nice

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

8.3

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 UVair contract fuel. Like all of the company's 13 FBOs, it participates in NATA 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.



Universal Aviation, Le Bourget



Harrods Aviation, Luton



Signature Flight Support, Le Bourget

Harrods Aviation

London Luton, UK

8.2

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

8.1

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

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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 apron parking, along with another four acres available 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.

Courtesy 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, A/V-equipped conference rooms with seating for up to 30 people, a private prayer



Hawker Pacific Flight Centre, Sydney

room, individual crew snooze 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—at 12 years old—is the oldest among the company's seven bases scattered through Australasia, 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 hamstrung by the privatized 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 few years, with last year's G20 Summit in Brisbane providing a welcome boost. Onsite customs and immigration clearance is available. Recently, the company was awarded a government aircraft-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 Citation 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.

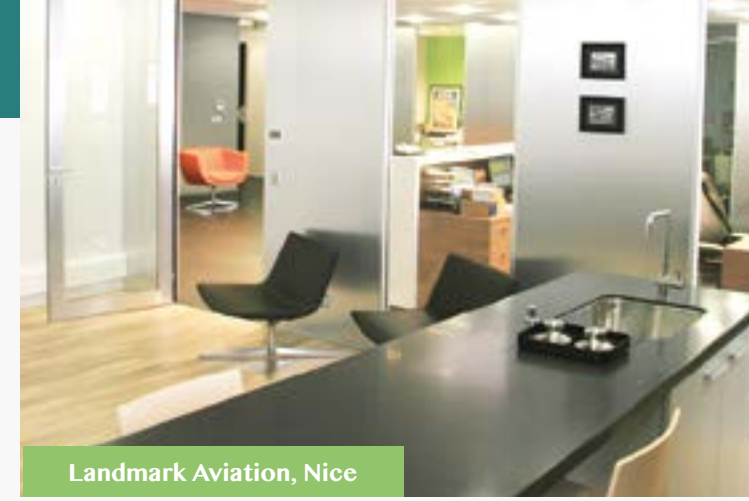
Landmark Aviation

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 occupies 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-use ramp, service providers at the airport exist mainly for transient traffic, and Landmark claims approximately 40 percent of it at Nice. "We handled 6,553 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



Landmark Aviation, Nice

gallons of jet-A, and for the past several years Landmark has operated its own pair of refuelers 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 staff of 45 and is open 24/7. Given the area's status as a summer playground for the wealthiest of patrons, the location's concierge service regularly finds itself providing services such as helicopter transfers and yacht charters, along with the more mundane hotel and limousine reservations. □

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