BOs across the length and breadth of Europe are enjoying traffic growth rates not seen since before 9/11. Expansion of the market for business aircraft handling is drawing new players at some airports, although this trend is still proving patchy due to continued obstacles to market access.

At other locations already stiff competition and rising costs are squeezing profit margins. Overall, long-anticipated consolidation is spreading throughout Europe, taking shape mainly through a wave of acquisitions that is resulting in the emergence of a handful of dominant FBO groups, such as Signature Flight Support, Jet Aviation and TAG Aviation.

An AIN survey of European FBOs shows average traffic growth rates of 24 percent. This is about twice the rate of increase recorded back in 2003, when FBOs were logging average annual traffic growth of 11.7 percent.

On average, European FBOs are now handling some 280 aircraft each month. Paradoxically, this is a 12-percent decrease from the average of 320 aircraft reported in the 2003 survey. This suggests that the continent’s higher overall rate of traffic growth reflects a more widespread expansion of business aviation activity in locations that previously had little or none.

Among the FBOs achieving the highest average traffic growth over the past 24 months are Jet Aviation at London Biggin Hill Airport (43 percent/73 aircraft on average per month), Harrods Aviation at London Luton Airport (75/1,200) and Bucharest Baneasa Airport in Romania (32/350).

The latest average figures disguise substantial variations in the scale of handling operations based on survey responses from the UK in the northwest to Turkey in the far southeast corner of Europe. At some airports there are still little more than a dozen business aircraft each month. By contrast, major business aviation airports, such as those in the London area, now receive more than 1,000 aircraft each month.

Turkey—which is seeking to join the 25-nation European Union (EU)—is a classic example of how business aviation is expanding. Istanbul-based Gozen Air Services provides executive handling at eight airports and has achieved average growth of 70 percent, but on little more than 50 aircraft at each base per month. Generally, the past two years have seen higher than average business aviation growth in the 10 states that joined the EU last year.

Gaining Market Access
EU competition rules require that new handling providers are granted access at airports with more than two million passengers per year. But some countries—such as Italy and Germany—are brazenly ignoring these rules.

For example, Naples-based Sky Services has faced protracted legal and bureaucratic battles to establish
its franchised FBO operations at Rome’s Ciampino Airport and Milan’s Linate Airport (see page 64). Managing director Clemente de Rosa expects to have to expend at least another 24 months of effort and expense to secure permission to provide exclusive aircraft handling at three other Italian airports—Venice, Olbia and Florence (see page 32).

Similarly, Swissport Executive Aviation (SEA) has ambitious FBO expansion plans in Europe but has found that gaining access to some prospective markets is more trouble than they are worth. According to vice president Alan George, authorities in both Italy and Germany are using their control over the issuing of full handling licences to restrict competition.

Other states, such as Spain, are taking a more liberal attitude. But even in locations where there is nominally competition for handling services, the competitor is often a favored state-owned airline with little or no commitment to or understanding of the special needs of business aircraft operators.

German airports can be doubly disadvantageous for aspiring new FBOs. On the one hand authorities can be extremely fussy about the issuing of handling licences. At the same time, they staunchly preserve the right of aircraft operators to handle themselves—diluting the potential market for FBOs, but also creating the very safety anomalies the licensing process is supposed to eradicate.

In particular, the right for operators to self-handle can amount to a security loophole. George has waited several hours to get the right security paperwork at German airports to access SEAs’ facilities only to see self-handling business aircraft crews and passengers wandering the adjoining ramp entirely unsupervised. This begs the question of how easy it would be for terrorists to board a business aircraft at one of Europe’s numerous small airports and fly into a major gateway such as Frankfurt to enjoy unmonitored access to ramps from which airliners could be attacked with shoulder-launched missiles.

Closing the Security ‘Loophole’

In fact, the EC is preparing to extend its existing requirements for full security screening to all categories of aircraft. It wants to extend the application of the European Union’s National Aviation Security Programs to aircraft weighing between 5,952 pounds and 21,825 pounds that are operated under commercial air operator certificates.

This would oblige operators and FBOs to ensure full security screening of, for example, flights by a Socata TBM 700 at the bottom end of the weight range and the new Bombardier Learjet 45XR at the top. Currently the requirements of the existing EU regulation 2320 already apply to aircraft that weigh 22,045 pounds or more or carry more than 19 passengers.

The responses to AIN’s survey indicate European FBO managers generally favor this move on the grounds that it will remove ambiguity from the current security regime. The strong consensus among FBO managers AIN questioned was that the removal of exemptions from security screening would make it easier for them in their dealings with customers who might otherwise resent the process. For example, it would put an end to uncomfortable situations in which operators try to circumvent local airport operating-hour restrictions by unilaterally declaring their mission to be under private rather than commercial rules.

A special report continued on next page. 

AIN’s 2003 European FBO Special Report of almost 19 percent, which would seem to cast doubt on claims that prices have barely been rising. However, allowing for the almost 5 percent weakening of the U.S. dollar against European currencies since September 2003, the increase is actually 14 percent, which still raises the cost of jet fuel induced business aircraft operators to chase lower handling prices to keep within operating budgets? In the view of Swissport Executive Aviation’s Alan George the answer generally comes down to the size of the aircraft concerned.

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“In our survey AIN asked European FBOs to provide a price estimate for receiving a Dassault Falcon 2000 carrying two passengers, arriving during peak times and requiring the following services: basic handling, aircraft cleaning, toilet and water service, ground power and parking for 10 hours. The average quote was $825, when converted into U.S. dollars at current bank rates. In fact, this represents an increase since
Signature builds its network of European FBOs

by Didier Daoust

With more than 1,700 employees worldwide, including 300 in Europe, Signature Flight Support handles nearly one million aircraft movements each year, offering a competitive advantage to its customers due to the company’s highly trained and demanding standards in the business aviation sector.

Signature has implemented a number of security measures to protect its customers at European airports. These include a positive ID system for pilots and crews to access the ramp, as well as ramp escorts. Customer service representatives, line crews and general managers are all trained to keep a watchful eye. The company has increased its security presence, with “specially trained” security guards at key locations. Additionally, security cameras allow employees to simultaneously keep a close eye on aircraft that are spread out over a large and active area as well as several key entry points.

At its Paris Le Bourget operation, Signature has installed a mobile baggage X-ray screening system. “It is the only facility on the airport that can provide such screening services,” claimed Best. The battle of FBO networks has only just begun in Europe. The growth of Signature and the Ferus group as well as the recent takeovers of handling groups such as AviaPartner in Belgium by Jet Aviation, Swissteam in Switzerland, and Swispion by Spain’s Ferrovial Group, illustrate the consolidation trend that may occur sooner or later in this sector.

Jet Aviation continues expansion

by Charles Alcock

Jet Aviation is preparing to open a new executive terminal at Dusseldorf Airport by year-end. The Swiss-based company has had an aircraft handling operation at the German airport for several years and now has the opportunity to upgrade its presence there to that of a major purpose-built FBO. It beat out competition from seven other firms for the right to build the new 4,305-sqft facility, for which construction was due to begin last month.

Dusseldorf Airport is a convenient gateway to Germany’s Rhine valley industrial region, as well as to the southern part of the Netherlands. Jet Aviation has had an FBO there for several years. Its other European FBOs are at Zurich and Geneva in Switzerland and at Biggin Hill in the London area. There are four more Jet Aviation FBOs in the U.S., as well as a new full-service facility in Dubai and operations in the Saudi Arabian cities of Riyadh and Jeddah (see story on page 45).

Moscow is the next horizon in Jet Aviation’s plans to expand its international FBO network. The company has already spent a long time evaluating the right location and partner for serving business aviation traffic bound for the Russian capital, and it says that it needs to do more work before it is ready to finalize this plan.

European private equity group Perma has recently acquired Ferus in France (for a sum thought to be in the region of $700 million). The new owner has yet to give any specific guidance as to the degree to which it is willing to provide fresh capital to support further expansion of Jet Aviation’s business.

Finding the Right Location

Building a chain of FBOs is a key part of Jet Aviation’s strategy of offering the strong, branded customer service the company believes reassures aircraft operators that they can expect a consistent standard of support at different airports. However, according to a spokesman, the

Signature FBOs

• Athens and Heraklion in Greece
• Paris and Toulouse in France
• Aberdeen, Birmingham, Bournemouth, Cardiff, East Midlands, Edinburgh, Glasgow, Inverness, London Heathrow, Luton and Southampton in the UK
• Dublin and Shannon in Ireland
• Charleroi (Brussels South Airport) in Belgium

Jet FBO has been well received and traffic has been growing since last year. “Toulouse is more than exceeding our expectations,” he noted. At London Heathrow, where Signature cares for 100 percent of the bizav traffic (having bought out the airport’s two other FBOs), “we have an extremely strong year and we have been integrating the two facilities while gaining from synergies.”

“For the future, I think our market will continue to consolidate, more so in Europe than in the U.S.,” said Haskins. “There are a lot of opportunities for us to expand and to enhance Signature’s reputation worldwide. At the NBAA Convention, we will highlight this growth in Europe and the extension of our network. Hong Kong is doing extremely well also, and Asia will become an important market for us in the course of the next 10 years, especially in China and Thailand,” she told AIN.

Security Procedures

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Hill FBO with a dedicated ramp on the southeast of London's financial district. London market. After rejecting the chance time assessing ways to enter the promising lines that are increasingly crowding the structure to meet its needs to know that the But Jet Aviation also

The new terminal is TAG’s latest move in the general aviation hub. (The recent opening of the new FlightSafety International Learning Center has further enhanced the airport’s standing in this respect.) TAG also has FBOs at Geneva Airport in Switzerland and at Berlin’s historic downtown Tempelhof Airport. Next year the company will add a new 15,000-sq-ft technical support facility at Farnborough, 35 miles southwest of central London. In January 2007 a new 100,000-sq-ft hangar will also be available at the airport, adding to the 240,000 sq ft of hangar space already available for aircraft up to the size of the B787. There is no shortage of aircraft parking space, with some 30 acres immediately adjacent to the terminal and a further 30 acres of remote parking if required.

At Luton Airport—30 miles north of London—Harrods Aviation has secured a second hangar and additional ramp parking. It has also provided free wireless Internet access, as well as at its Stansted Airport FBO (35 miles north-east of the UK capital).

Over the next year, the company will be refurbishing both facilities, which also include features such as conference rooms, as well as crew lounges and rest areas.

Harrods competes with Signature Flight Support at Luton. At Stansted, its rival handlers are the Inflite Jet Centre and Universal Weather & Aviation.

Harrods, a sister company of the famous London department store of the same name, offers comprehensive services for corporate aircraft crews, including cleaning aircraft cockpits and cutlery as well as dry cleaning.

The company still has ambitions of opening new bases in other parts of Europe and has been actively exploring prospects for running an FBO at Paris Le Bourget Airport.

Return to Heathrow After some difficult years during which business aircraft found themselves squeezed out of London’s Heathrow Airport by a slot allocation system that strongly favored airline traffic, the Signature Flight Support FBO there has enjoyed encouraging 15-percent growth. Most of the movements it handles are now the more lucrative large, airliner-class VIP transports.

It was this trend that inspired the company to acquire both of Heathrow’s other FBOs—Harrods Aviation and Executive Aircraft Services—during the past 12 months.

Jet Aviation’s Biggin Hill facility includes on-site customs and immigration clearance, separate crew and passenger lounges and office space. Over the past 12 months the company has added a separate crew snooze room with two beds and has hired more handling staff. Its dedicated ramp can accommodate up to eight aircraft at a time and the 27,125-sq-ft hangar can house aircraft up to the size of a Gulfstream G550.

According to the company spokes-
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tion’s European FBOs—such as Bernard Ratsira at Geneva and Robert Whitehead at Zurich—as evidence of the company’s commitment to building lasting relationships with operators. “This is what keeps our customers coming back. The fact that we have genuine full-service FBOs, offering maintenance as well as handling,” he told AIN.

Jet Aviation also benefits from operating aircraft itself (with both managed and charter fleets), giving its FBOs an intimate understanding of operators’ handling needs and priorities.

Several FBO companies set their sights on London by Charles Alcock

Next month TAG Aviation is due to complete construction of a new terminal at Farnborough Airport. The 50,000-sq-ft building at the London-area airport will include an operations center, passenger lounge and offices.

The new terminal is TAG’s latest major investment in its bid to position Farnborough as London’s foremost business aviation hub. (The recent opening of the new FlightSafety International Learning Center has further enhanced the airport’s standing in this respect.) TAG also has FBOs at Geneva Airport in Switzerland and at Berlin’s historic downtown Tempelhof Airport. Next year the company will add a

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Vivendi, has also experienced a traffic turn was first seen at the beginning of last year of 10 new countries to the Euro-

aments a year. After the post-9/11 economic downturn, traffic in 2002 and 2003 stabilized at around 55,500 movements, rising to more than 57,000 movements last year. De Ronne expects similar growth for this year.

Le Bourget currently receives arrivals and departures to and from some 180 airports in France, more than 230 in the rest of Europe and about 270 cities elsewhere. The airport’s FBOs between them account for about 130,000 passengers annually.

According to de Ronne, the traffic upturn was noticed a year at the beginning of last year. “One factor was the addition in May last year of 10 new countries to the European Union, mostly small east European nations that did not have good regular air connections to the main west European countries that were expanding business there. This encouraged business aviation to move to European business centers, including Paris.”

The Aero Services FBO, acquired last year by Portuguese air transport and maintenance group Omnia Aviação e Tecnologia from major French media group Vivendi, has also experienced a traffic upturn, with the average number of aircraft handled each month increasing from around 250 to 300.

Flying Group: New Kid on the Le Bourget Block

Flying Group will be the new kid on the Le Bourget block when it takes over the former Eurail FBO at the end of this month. (See AIN October, page 58.) The expanding Antwerp, Belgium-based company has reached the final phase in its acquisition of Eurail Aviation Services. Spokesman Ben Paimadieu said the company is investing heavily in the project and plans to open a new building next year. Meanwhile, Flying Group is looking for an intermediate solution for Le Bourget operations during the construction project. Paimadieu would not confirm that this might in fact be the new Le Bourget executive terminal that is due to open in March. He said that at least one Citation Excel will be based at Le Bourget, where the company will concentrate on fractional ownership and aircraft management. In March last year, Flying Group bought French executive charter firm Cap Camarat Business Jet, based at Cannes-Mandelieu Airport in the south of France. –Jeff Apter

The Security Net Tightens

This year Le Bourget started implementing its security improvement program. This involves daily inspection of the perimeter, strengthened enclosures around the airport and around individual company facilities, limitation of the number of access points to the airport and stricter controls on entry into reserved zones.

FBOs are responsible for making their own arrangements to their sites. Universal Aviation’s Smithshujzen said that one effect of the new safety rules is to ban private vehicles from the ramp.

FBOs at Paris Le Bourget Airport, which makes a strong claim to be Europe’s biggest dedicated business aviation gateway, are experiencing growth with a steady increase in business aviation movements. At the same time competition is heating up, with the arrival of a new operator, a merger between two existing bases and the prospect of a completely new executive terminal.

Le Bourget Airport chief executive Michel de Ronne told AIN he is confident that improvements already made under the 12-year refurbishment plan will increase traffic, which at its peak in the early 1990s amounted to 70,000 movements a year. After the post-9/11 economic downturn, traffic in 2002 and 2003 stabilized at around 55,500 movements, rising to more than 57,000 movements last year. De Ronne expects similar growth for this year.

Le Bourget currently receives arrivals and departures to and from some 180
Swiss businesses upgrade facilities

by Charles Alcock

The ExecuJet Aviation FBO at Zurich Kloten Airport has installed a WLAN high-speed communications connection for passenger and crew use. Also new is a vending machine selling snacks and drinks, giving visitors choices beyond the complimentary coffee and mineral water. The facility, purpose-built with private access well away from the airport’s main terminal, benefits from having its own private ramp for parking a number of light and midsize aircraft, as well as an adjoining hangar. It also offers quiet rooms for aircrew, as well as showers with complimentary towels and other bathroom necessities such as razors. Crews can also use cars and bicycles at no charge.

On the other side of one of the Zurich runways, the Jet Aviation FBO offers its own lounge and pilot briefing room. It has invested in a fleet of new four-wheel drive vehicles for ground transportation. ExecuJet now has plans to establish full-service FBOs at both Berlin Schoenefeld Airport (where the Luft Hansa Bombardier Aviation Services maintenance facility is located) and Frankfurt Airport (where Jet Connection has offices and hangar space). It already has operations at Johannesburg Lanseria and Cape Town International Airport in South Africa, as well as at Australia’s Sydney Kingsford Smith Airport. It is preparing to open a new FBO at Dubai in the United Arab Emirates later this year.

Meanwhile, at Geneva Airport, TAG Aviation is proposing to create a larger crew lounge in the executive aviation terminal that it occupies with Jet Aviation and PrivatAir (the joint venture between Swiss Executive Aviation and PrivatAir). It is also about to invest in a new minibus.

On the north side of the airport, TSA Transairco has added a new crew lounge and meteorological station to the general aviation terminal. Over the past year, it has increased its use of Abelag as the trading partner in Kortrijk, has a fleet of two Eurocopter AS365 Dauphins, an EC 120B Colibri and an MD Explorer.

A battle for Brussels market looms

By Didier Daoust

Brussels International Airport records more than 13,000 general aviation movements most years. For the time being, Abelag Aviation remains the sole FBO at the Belgian airport, enjoying an informal monopoly despite several attempts by competitors to enter this key market. The most important attempt was that of former Swiss Aeroleasing group (now TAG Aviation) in the early 1990s, which even had its own FBO terminal in Brussels after it acquired a Belgian air-taxi operator, Jet Business Airlines. The Sabena group eventually took over the terminal, which once housed the now bankrupt Sobelair charter airline.

Last year, Abelag celebrated its 40th anniversary, making it one of the oldest European business aviation companies. In 2000 it became—with Sky Service—part of holding group Westlink, creating a group with facilities in Antwerp, Brussels and Kortrijk in Belgium as well as at Lille, France.

A rebranding process took place last year that involved a change of logo and the uniform appearance of Abelag as the trading name for all of the activities of the group: executive charter, aircraft management; fractional ownership; handling; services; and maintenance. The group also operates ambulance flights from its Kortrijk base.

The new group completely refurbished the FBO’s interior at Brussels, giving visitors a more dynamic and modern feel. Abelag now provides handling support to around 3,000 aircraft, and 15,000 passengers a year in Brussels. It has 43,000 sq ft of ramp for parking aircraft up to the size of a Boeing 747. It also has 26,910 sq ft of hangar space for aircraft up to the size of a Gulfstream G550. Abelag Aviation, which has 26,910 sq ft of hangar space, has added a new FBO at Dubai in the United Arab Emirates later this year. The group also has 26,910 sq ft of hangar space.

“Because we are a small and flexible company, we can move the ramp and win deals over the competition. We don’t look at saturated markets with a good choice of service providers, such as the UK, France or Italy. Our targets for next year are Scandinavia (both Stockholm airports and Gothenburg in Sweden, Copenhagen in Denmark and Oslo) where there is a demand for true VIP handling service,” explained Feras co-managing director Chris Cartwright.

But Brussels is also on the Feras hit list, and it’s only a matter of months before the company intends to move in to this market. “It will be a full Feras venture and it will be comparable to our operation in Munich, with an operations office and crew lounge,” said Cartwright.

“We have been extremely busy in Brussels, a market that is only two years old for us, for the last seven or eight months. We want to keep our quality up,” Cartwright told AIN. Feras is now present at all three Berlin airports [Tegel, Tempelhof and Schoenefeld] where the traffic is growing. “In Frankfurt, we are the only private handling agent, and we have our own offices and lounges in the general aviation terminal.”

At press time, Feras was preparing to open a new base at Hamburg Airport in northern Germany. Hamburg’s general aviation terminal, which opened in July 1990, is viewed as one of the most modern business aviation centers in the world.

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Swissport adds Spanish facility to its network
by Charles Alcock

Swissport Executive Aviation (SEA) is opening a new FBO at Spain’s Malaga Airport this month. The move is the next step in the company’s ambitious plan to double its current number of European FBOs to 20 between now and the end of 2007.

Seven more of the envisioned new facilities are expected to be at other southern European airports, with two others at locations in the north of the continent. SEA is part of the Swissport airline handling group, which has just been acquired by the Spanish Ferrovial group, which is expected to provide fresh capital to fund the FBO expansion.

SEA already has 10 European FBOs, at Geneva; Nice in the south of France; Germany’s Berlin Tempelhof and Schoenefeld, as well as at Munich, Dusseldorf and Hannover; and at Athens and Heraklion in Greece. Additionally, 55 of the Swissport group’s 170 airline handling stations worldwide have now been approved to support business aircraft.

According to SEA v-p Alan George, these airline handling stations are more like regular airline stations. He has established his franchised business aircraft operators. SEA will open about four of the 10 planned new FBOs in partnership with other companies. It already has joint venture operations at Geneva with PrivatAv (where it trades under the name PrivatPort) and at Nice with flight-plan- ning group UniversalAviation (UniAv). It also has a marketing alliance with the ExecuJet Aviation FBO at Zurich Airport in Switzerland.

According to George, further consolidations is in the cards in the European FBO sector. He expects to see a further wave of acquisitions by his company and by other major players. In his view, service standards at Europe’s FBOs generally remain inconsistent, and he expects the emergence of chains to ensure consistency to do so. It also wants to secure private aircraft parking space at Rome and Naples for its clients to justify further investment in ground handling equipment. At Rome Ciampino, the company hopes to create a pilot snooze room.

For the past 18 years, Universal Avia-
tion Italy has operated under a supervi-
sory license that allows it to ensure that fully licensed handlers are addressing its clients’ needs. At last the company has been granted its own full license for Milan Linate and for Rome Ciampino airports.

**Italian Firms Ready To Compete**

Existing Linate handler Ali Transporti Aerei (ATA) has provided a new crew logistics service in the past year. With ad hoc Internet connections, as well as a fully equipped operations center. The company, which operates from the general aviation terminal, is now planning to add a new ramp, in Rome Ciampino and a new ramp space. It will also extend its hours of operation from 6 a.m. to midnight.

ATA has eight hangars at the airport but can offer these to corporate clients only on a space-available basis. Like Sky Services, it is a lobbying the Linate man-
agement to allow construction of more hangar and ramp accommodation, at an airport that almost certainly receives the most business aviation traffic in Italy.

Meanwhile, at Turin AirPort at the northwest of Italy, Sagat Handling is preparing for an influx of corporate traf-
ci associated with the Winter Olympic Games that the city will host from February 10 to 26. The FBO is currently located in the airport’s main terminal but it is expecting to move into a new general aviation terminal that is set to open by year-end, with a dedicated, ad-
joining ramp for business aircraft. The airport authority does not currently allow direct limousine access to the aircraft steps, but the operator hopes that this policy will change.

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**Monopolies get state protection in Italy**

Independent FBO groups are at last challenging cozy ground handling monopolies in Italy. But the new market entrants have encountered resistance at every turn as authorities try to dodge Eu-
ropean Union competition rules.

Both Sky Services and Universal Weather & Aviation have won long-run-
ing battles to secure full handling li-
ers for airports in Milan and Rome. But even with the paperwork in hand, the companies often found they had to contend with local aviation officials and airport management deliberately throwing obstacles in their way to pre-
vent their efforts to actually start serving business aircraft operators.

Nonetheless, Naples-based Sky Ser-
vices has now established its franchised operations at both Milan Linate and Rome Ciampino Airports, and it intends to build a network of FBOs at other Italian airports. At Naples Capodichino Airport, where the company already has its own ramp space, it has also extended its hours of operation from 6 a.m. to midnight.

**Sky Services handles about 100 aircraft a month at Naples.**

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**Flight-planning services boost European efforts**

Along with the world’s two other leading flight-planning groups, Universal Weather & Aviation’s home is in Houston. But in the past five years the company has had a conscious effort to be more Euro-centric. Universal now has five of its own FBOs in Europe—at London Stansted, Paris Le Bourget, Milan Linate, Rome Ciampino and Shannon, Ireland. And in addition to its UV Global Network partner FBOs, the company also has specific joint ven-
tures with the Feras group of handling supervisors (with bases throughout Rus-
sia, central and eastern Europe and in the United States) as well as with EuroAviation (Greece), Universal Spain (Madrid and Barcelona) and Swissport Executive Avia-
tion (Nice in the south of France). In Janu-
ary, Universal will relocate its existing Paris Le Bourget base into a newly refur-
bished building with adjoining hangar space (see page 28).

**Vetting FBOs**

Three years ago, Universal established a European operations center at Stansted to create a specialist flight-planning team dedicated to serving the needs of more independent operators flying within Eu-
rope. Now it has appointed Yeet Jones a new sales manager for Europe, the Middle East and Africa, with Jonathan Howells promoted to regional director for these markets.

“We’re different from a traditional hand-
ing company because we send our own traffic (i.e. its flight-planning clients) to FBOs, so we have a good understanding of service standards and where there might be a case for opening a new base,” Howells explained to AIN. “There is a distinct limit on jewel-in-the-crown loca-
tions (where there would be a case for

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Swissport provides a crew lounge at Munich.
Flight planners

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opening an FBO, but we can develop the UV Global Network here and bring in more secondary locations."

But the limited opportunities for opening new FBOs in Europe aren’t all related to limited volumes of bizav traffic. Howells confirmed that it is still proving hard to break up handling monopolies, especially at locations where airport management don’t make a true distinction between airline and general aviation handling (see page 32). “The attitude of airports varies a lot,” he said. “We expect to get there in the end, but it won’t happen overnight.”

Universal has stringent requirements for the FBOs that join the UV Global Network, enforcing precise policies on details such as how to cone off aircraft noses, wings and tails. Customers using these facilities benefit from a central billing network, in addition to Universal Trip Support flight-planning clients.

Rival flight planning group Air Routing has taken a different approach. It doesn’t operate FBOs itself and it doesn’t guide clients toward bases on a preordained list. According to UK representative Terry Yeomans, the company prefers to let clients specify their preferred FBO and focuses instead on ensuring that all the requirements for a specific trip are met wherever that aircraft is handled. “We have no vested interest in the choice of FBO,” he explained. The firm now has European offices in London, Paris, Frankfurt, Moscow and Nice.

Flight-planning Firm Neutral on FBO Choice

So does this approach mean that Air Routing finds such consistent levels of service quality that it is comfortable sending clients to any FBO in Europe? Yeomans was tactful on this issue while acknowledging that there are parts of Europe that are not culturally predisposed to provide the type of service that U.S. operators, in particular, would generally expect. He said that first-time U.S. visitors are especially prone to culture shock about the facilities and practices they find both at airports, and at hotels and other service providers.

“There are differences in expectation between FBOs and clients,” he acknowledged. “We don’t go to all FBOs with a long and precise list of general requirements because we accept that people do things differently around Europe.”

Yeomans emphasized that in some locations there might be perfectly legitimate reasons why the operator cannot provide handling strictly according to a book of rules and argued that it is better to supervise each trip on its own merits. Often an FBO is severely constrained in what it can do by rigid restrictions imposed by airport managers, such as at Ireland’s Dublin Airport.

The continuing wave of consolidation in the European FBO sector is seeing the emergence of several chains. In Yeomans’ view this should in theory result in greatest consistency of service quality. However, he also cautioned that branding alone isn’t an assurance that a group’s reputation will travel well. He also added that even large-scale investments by the dominant groups won’t necessarily overcome inherent operational and infrastructure restrictions at certain European airports.

In fact, Yeomans believes that consolidation and FBO chain-building may have now run their course due to the limited market access opportunities at European airports. He added that he would regret the disappearance of independent FBOs, with their distinct approaches to the task of executive aircraft handling.

Baseops International president Jerry Scott also believes that more FBO consolidation is coming in Europe, but he too is not entirely convinced this is a good thing. He acknowledged that the trend should result in larger, stronger FBO networks that are better able to invest in equipment, facilities and training.

On the other hand, Scott is saddened by the prospect of entirely homogeneous services. “When speaking to FBO personnel outside the U.S., I encourage them not to lose the local flavor of their culture. This makes them unique,” he commented.

Through its parent company World Fuel Services, Baseops has a presence at locations throughout Europe. Scott told AIN that it tends to send flight-planning clients to its network of trusted FBOs and would be likely to use a new facility only after receiving commendations from operators that have actually used that FBO.

In Scott’s view service consistency problems tend to occur in Europe at locations where airport authorities impede an FBO’s doing a good job by imposing operational restrictions. He said that heightened security has only made this tendency worse. According to Scott, elevated fuel prices have prompted business aircraft operators to be even more value-conscious when paying for other services, such as handling. However, he added that customers will generally remain loyal to an FBO that provides good service at “reasonable prices” and that the fuel-handling prices dynamic is different in Europe because FBOs are not generally selling fuel themselves. —C.A.
London

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Signature has consolidated the two Heathrow operations in the former Harrods Aviation premises, which are situated on the south side of London’s main gateway next to Terminal 4.

Smaller London Airports

Over the past two years, London Biggin Hill Airport has resurfaced its main runway and has become the UK’s only general aviation airport permitted to accept traveling pets under agriculture department rules. The privately owned airport group, which also includes Southend Airport (35 miles east of London) and a handling operation at Northolt air force base, is now advancing more ambitious plans to build new hangars as well as a hotel and restaurant.

Northolt itself, situated 14 miles west of downtown, has always had great potential as a business aviation gateway for London but this has always been severely compromised by the government’s traffic restriction of 7,000 civil movements per year (compared with the 28,000 permitted at Farnborough).

According to sources close to the Ministry of Defence-owned airfield, the government may soon accept the case for further development of the existing civil enclave. Several business aviation service groups are known to be evaluating such a project but are not likely to proceed unless the government grants a significant increase in the volume of traffic permitted to use the facility.

Meanwhile, at Manchester in northwest England Northern Executive Aviation is making plans to extend its passenger lounge. The company, which can also provide extensive maintenance support, is the only FBO on the airport.

Swissport

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At the new Malaga base, George has been supervising the training of SEA’s new team since August. In addition to studying handling requirements, employees role-play different customer service scenarios and have also spent time working at the Nice facility.

During the first week of operations in Spain, a manager from SEA headquarters will be on site to ensure consistent levels of service and to troubleshoot any problems.

In George’s experience, transferring Swissport airline handling staff to SEA doesn’t necessarily work because the service ethos for business aviation is so different. “It is better to take someone who has worked in a five-star hotel and teach them aviation than to teach an aviation person the right approach to service,” he concluded. “After all, an FBO really is just a five-star hotel without bedrooms.”

Brussels market

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Latvia, is busier than ever. In Ukraine, we operate at both Borispol International Airport and Zhulhany Airport in Kiev. Moscow is busier and busier; we operate from Domodedovo general aviation terminal, which is a good alternative to Vnukovo—where there is a lack of icing equipment and parking facilities—in the winter.”

Competition from the South

Although there is currently no competition for Abelag in Brussels, the nearest competitor is fewer than 30 miles south of the Belgian capital, at Charleroi Brussels South Airport. SignatureCharleroi might be the smallest facility in the ever-expanding Signature Flight Support network, but it is as successful in attracting customers for the quality of its handling services. At the end of last year Signature took over the former Menzies/Execair facility, which was established there at the end of 2000.

The advantages of Charleroi Airport are numerous. As a secondary airport, it is less expensive in terms of fees and there are no slot restrictions. In addition, the shortened time spent on the ramp and taxiways makes up for the longer car ride to Brussels (about 30 minutes); taxi time is two minutes, whereas it can be up to 20 minutes of holding and taxi time during peak hours in Brussels. Signature’s two-man team is also enjoying fruitful cooperation with the local air traffic controllers.

However, Charleroi is not a 24-hour operation like Brussels or Liege airports and it lacks hangar facilities. The operating hours are less of a problem, although it creates an uneven playing field among airports. Meanwhile, Signature Charleroi operations manager David Dumont is hopeful about making hangar space available since some customers require it.

For the time being, the office and crew/passenger lounges are located within the main passenger terminal, which is far from ideal. However, in 2007 a new passenger terminal should be completed on the north side of the airport. This will leave Signature with two options: renovate part of the existing terminal on the south side to accommodate a real general aviation terminal or build a new facility on the north side, close to the plant of the aerospace manufacturer Sonaca, which might be a less expensive solution.

Signature, noted Dumont, enjoys a competitive advantage over other FBOs in Europe by its involvement with VIP and executive aviation handling, while being part of a large and powerful group (BBA Aviation), with a strong foothold in the U.S. and a growing international presence.