

Data compiled by David Leach; narrative by Curt Epstein



TAG Farnborough Airport

With international business aviation traffic stalled, service providers await a long-promised rebound

While the North American business aviation market has shown signs of recovery of late, for many other parts of the world fortunes have continued to fluctuate, making for a mixed outlook for the global FBO industry. Emerging bizav markets across regions such as Asia and Africa have seen encouraging traffic growth, even if opportunities to expand FBO services in these places have been somewhat limited. Meanwhile, service providers in Europe's more mature market have yet to see sustained recovery from flight activity dips in recent years, but there are some notable exceptions.

"These have been interesting times for us as an industry, parts of which remain in distress while others are recovering," said Mark Abbott, group FBO director with ExecuJet Aviation. "Statistics on the geographic contribution to the traffic we're seeing through our FBOs show that a considerable amount is U.S. traffic."

Indeed, according to the FAA, U.S. business jets logged a record 666,798 international movements last year, up 1.7 percent over 2012.

"We've seen the renaissance of business aircraft coming from the U.S.," said

Brandon O'Reilly, chief executive of TAG Farnborough Airport in the UK, who noted the beginnings of an uptick in inbound transatlantic traffic in 2011.

But despite the flights from the U.S., private jet traffic in Europe over the past year has remained largely flat. The most recent Departures, Arrivals, Internals and Overflights Report from the European Business Aviation Association and Euro-control shows that business aviation traffic in Europe is down approximately 1.8 percent over the past year. "I think everybody is tied to the general market conditions," said Jonathan Howells, senior vice president international with Universal Weather & Aviation. "When the markets are up, people are flying more."

At major European business aviation airports such as Paris Le Bourget and Farnborough, FBOs have reported a growing percentage of large-cabin aircraft on their ramps. "Europe is important because other than the U.S., it's the one place where you still get higher-frequency, smaller-cabin [traffic], whereas from the Middle East or Asia it's the big iron, which isn't as good from a frequency standpoint," said Richard Aboulafia, vice

president for analysis with U.S.-based research firm Teal Group. "Of course it speaks to a local indigenous market that's just not showing signs of a full recovery or anything like it." With medium and light jets constituting a large slice of Europe's business jet fleet, continued underutilization of such aircraft is clearly affecting businesses. "So much of an FBO's activity depends on the small and midsize cabins getting out and flying," Aboulafia told AIN. "That's where we haven't seen a recovery in the numbers."

Signature Flight Support operates bases worldwide, including its facilities at Le Bourget and London Luton, which earned recognition in this year's survey. "In EMEA [Europe, the Middle East and Africa] we are still behind the improvement curve that we have seen in North America, and I think it's fair to say the amount of business and general aviation activity there is still down," noted Maria Sastre, Signature's president and COO, adding that the company hopes to see signs of a recovery there in Fiscal Year 15. The UK GDP grew strongly last year, and the prediction for it and most of the larger EU nations is for continued growth this year, but there are still some headwinds pushing against the region's economic rebound. "There are peripheral

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countries around Europe still in recession, such as Greece, Italy and Spain, and I think that is reflected overall in business aviation's performance throughout Europe," said TAG's O'Reilly.

Landmark Aviation, a predominantly North American operation, made a splash in the UK business aviation market last month when it acquired RSS Jet Centre, which operated the former Ocean Sky FBOs at London Luton Airport, Manchester Airport and Glasgow Prestwick International Airport. "We are excited to expand our operations into the United Kingdom," said Dan Bucaro, Landmark's president and CEO. "This acquisition increases our presence in Europe, and is representative of our commitment to the strategic growth of our network."

The Houston-based company, which now operates 57 FBOs, has had a presence in France since 2006 and now has bases at 10 airports there, including Paris Le Bourget, where a new \$4.1 million terminal is set to open. “We still look at Europe as a good market,” Bucaro told *AIN*. “While it’s a lot smaller than the U.S., it can have significant growth if the economies get moving and the EU starts moving in a positive direction.”

Beyond Europe

Farther afield, the picture becomes more fractured. While the worldwide average breakdown of the business aviation fleet is 26 percent heavy, 34 percent medium and 40 percent light jets, for both the Middle East and China those statistics are turned upside-down, according to industry analyst Brian Foley. For the Middle East, the breakdown is 68 percent heavy, 22 percent medium and 9 percent light, while the numbers for China are 63 percent, 25 percent and 12 percent, respectively, reflecting the mainly long-range missions originating from these regions. “There are important reasons for this—including culture, politics, geography, trade and infrastructure—whose effects will be long lasting,” Foley noted.

“We have the Middle East, where we see moderate growth, and then of course Asia,” said Monica Beusch, Jet Aviation’s head of FBO services in EMEA and Asia. “I would say growth in Asia is not as high as in the past, but it’s still the region outside the U.S. showing the most growth.”

While most cosmopolitan areas in the Middle East are now well served by FBOs, the private aviation industry in general is still waiting for Asia, particularly mainland China, to hit its stride. “It’s a chicken-and-egg thing, especially in Asia,” noted Aboulafia. “You need FBOs and infrastructure to drive growth and you need growth to drive the development of FBOs and infrastructure.” Complicating matters in the region is the high level of regulation from the Chinese government, which serves to slow business aviation growth.

Another region that has high potential is Africa, according to ExecuJet, which operates three FBOs there. “Apart from its natural resources such as oil and gas and minerals such as diamonds and gold, the economies of the continent as a whole are certainly fueling growth in the business aviation market,” Abbott told *AIN*. While the continent has long been a retirement home for older business aircraft, he has noted a recent influx of late-model Globals, Gulfstreams and even bizliners such as the Boeing Business Jet. At the company’s FBO in Lagos, Nigeria, which opened in late 2012, the 54,000-sq-ft hangar is already at capacity. “The level of operational activity in African-owned domestic traffic has increased significantly, and obviously worldwide interest in Africa is on the increase as well,” Abbott added. □

Top Rated FBOs in Europe, Middle East, Asia and Africa

FBO	Airport	Airport Code	Line Service	Passenger Amenities	Pilot Amenities	Facilities	CSRs	Overall Average
TAG Farnborough Airport	Farnborough	EGLF	8.7	9.3	9.1	9.3	9.0	9.1
Jet Aviation	Geneva International	LSGG	8.4	8.5	8.4	8.6	8.4	8.5
TAG Aviation	Geneva International	LSGG	8.2	8.8	8.2	8.5	8.2	8.4
Harrods Aviation	London Luton	EGGW	8.2	8.6	7.9	8.2	8.2	8.2
Landmark Aviation	Nice Cote d’Azur International	LFMN	8.0	8.4	8.1	8.2	8.2	8.2
Universal Aviation	Paris Le Bourget	LFPB	8.5	7.7	8.0	8.0	8.7	8.2
Dassault Falcon Service	Paris Le Bourget	LFPB	8.4	8.2	7.5	7.8	8.0	8.0
ExecuJet Middle East	Dubai International	OMDB	7.9	8.2	7.6	8.3	8.1	8.0
Landmark Aviation	Paris Le Bourget	LFPB	8.7	7.8	7.5	7.5	8.5	8.0
Hawker Pacific Flight Centre	Sydney Kingsford Smith	YSSY	8.2	7.8	7.7	7.8	8.2	7.9
Hong Kong Business Aviation Centre	Hong Kong International	VHHH	8.0	8.0	7.9	7.8	7.5	7.9
Jet Aviation	Dubai International	OMDB	7.8	7.9	7.7	7.7	7.3	7.7
ExecuJet Europe	Zurich	LSZH	7.4	8.0	7.0	8.0	7.2	7.5
Jet Aviation	Zurich	LSZH	7.6	7.7	7.2	7.4	7.8	7.5
Signature Flight Support	Paris Le Bourget	LFPB	7.5	7.7	7.4	7.4	7.7	7.5
Swissport Executive	Nice Cote d’Azur International	LFMN	7.8	7.5	7.2	7.1	8.3	7.5
Jetex Paris FBO	Paris Le Bourget	LFPB	7.2	8.0	7.5	7.5	7.2	7.4
Signature Flight Support	London Luton	EGGW	7.9	7.2	7.3	6.9	7.9	7.4
VIPPort Vnukovo-3	Moscow/Vnukovo	UUWW	6.7	6.6	5.2	5.7	6.2	6.1

Source: *AIN* 2014 FBO Survey. Highlighted text indicates an overall average of 8.0 or greater. Ties are listed alphabetically by FBO name.

Top-ranked FBOs

With most European countries still lagging the U.S. in economic recovery, the numbers of short- and medium-range private aviation flights in the region remain stagnant. Over the past year, however, many FBOs in Europe have noted an uptick in longer-legged traffic originating from North America, the Middle East, Africa and Asia, and competition among service providers remains fierce. The international FBOs profiled below are the highest-scoring (8.0 or higher) facilities in this year’s *AIN* survey of FBOs outside the Americas.

TAG Farnborough Airport London, UK

9.1

While the scores of international FBOs traditionally lag those found in *AIN*’s North American survey, TAG Aviation Farnborough, with an overall rating of 9.1 in this year’s survey, proves it clearly ranks among the highest echelons of the world’s FBOs on any continent.

Since taking over the airfield from the UK’s Ministry of Defense a decade ago, the company has invested \$166 million in infrastructure, transforming the former military field into one of Europe’s premier business aviation facilities. Because the airport is dedicated exclusively to business aviation, said TAG Farnborough Airport CEO Brandon O’Reilly, it “is designed around the business aviation operation, and that’s why we design everything around the business aviation crew and customer.” Given its ownership of the airport, TAG is, of course, the sole FBO provider at

FBO SURVEY RULES AND METHODOLOGY

This report of *AIN*’s 2014 FBO survey covers fixed-base operations in Europe, Asia, Africa, the Middle East and Australia/New Zealand—in other words, the Eastern Hemisphere. Our report in the April edition of *Aviation International News* covered the Western Hemisphere.

AIN has been conducting surveys asking about the service that FBOs provide their customers and providing 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, announcements in *AIN*’s e-newsletters and in the January issue of *Aviation International News*, *AIN* invited all qualified *AIN* 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. —R.R.P.

Farnborough. It has earned the top spot in the *AIN* International FBO Survey for the past several years.

While the airport experienced a bump in traffic in 2012 driven by the London Olympics, according to O’Reilly, last year’s numbers (approximately 24,000 movements for the year) showed a slight increase. More telling was the change in the mix of aircraft using the airport: in 2012 it saw a 45-percent increase in the number of bizliners such as the Boeing BBJ and the Airbus ACJ, many of those carrying visitors to the Olympics, yet last year that number continued to climb, by 8 percent. Likewise, Farnborough has seen a steady increase in operations by

large-cabin long-range business jets such as Gulfstreams and Globals. O’Reilly credits the increase largely to the growing resurgence of the U.S. business aviation market as well as a rise in traffic from other regions, as the traffic from Europe has remained static. “The Middle East produced a strong performance in 2013,” he said, adding that the aircraft coming from India and China, although small in number, reflect the changing global economy. Those arriving aircraft find plenty of shelter given the FBO’s 240,000 sq ft of hangar space, which is home to 65 business jets ranging from a Premier I to an Airbus ACJ319.

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The FBO has plans to begin a terminal redevelopment project this year. TAG purchased a building on the fringe of the airport last year and by year-end will relocate its administration and support staff there from the terminal, freeing another 12,000 sq ft on the second floor for customer use in the form of more passenger lounges and crew amenities. A new dedicated passenger and crew entrance to the airport will be added by year-end. While the company operates its own upscale hotel on the airport, last year TAG purchased a renowned local pub/inn, The Swan, for crews seeking that style of lodging near the airport property.

Another recently added amenity is “drive-through” immigration clearance. While most arriving flights are greeted upon landing by an immigration agent, in the cases they are not, customers can simply get in their vehicles rampside and present their passports as they exit the restricted area.

TAG Farnborough recently received government approval to [increase its limit of movements to 50,000 a year](#), currently just a strategic move given the airport’s average of just over 24,000 operations a year, but one that clearly points to TAG’s plans to handle double the traffic. In February the facility logged its busiest week-end on record, a confluence of the end of a school holiday, the England versus Ireland Rugby International Match in nearby Twickenham Stadium, and the conclusion of the Sochi Winter Olympics,

which added some 230 movements.

Environmentally sensitive, the airport has banned all aircraft that do not meet Stage IV noise requirements. It is the only facility in Britain to do so, and is currently undergoing a public review of new flight paths into and out of the airport in an effort to further reduce both the noise impact on the local communities and fuel burn by providing more direct routes into and out of Farnborough. The airport is also well on its way to satisfying its mandate of carbon neutrality by 2019, having recently earned level three in a four-step program run by the Airports Council International.

Jet Aviation Geneva, Switzerland

8.5

Jet Aviation, a service provider at Geneva International Airport for 45 years, recently completed a redesign of its FBO that became the stylistic template for the company’s 16 locations worldwide. “We are trying to standardize at the locations so when customers arrive in Geneva it’s the same experience for them as in Zurich or Dubai,” said Monica Beusch, head of Jet Aviation’s FBO services in EMEA and Asia. Part of that standardization is the adoption of a new staff uniform set to make its debut around the network this month.

Unveiled at last year’s EBACE, [the renovation of the company’s flagship](#)

[European facility](#) added another floor, nearly doubling the size of the 10-year-old terminal to 7,000 sq ft and bringing the facility to the standards of the company’s premier FBOs. Among the features are a new reception area, three passenger lounges that can be secured for privacy, crew lounge with snooze rooms and shower and on-site customs and immigration service. Those improvements served to give the location its highest score in the facilities category.

Given Geneva’s prominence on the political stage as the headquarters for several international organizations, the FBO focuses on handling large aircraft such as those that typically carry diplomats to the city, according to Beusch. She noted the FBO can handle anything up to a 747 and has more than 44,000 sq ft of hangar space.

Another attraction is the facility’s large maintenance operation, which serves as both a draw in traffic to the FBO for customers seeking service on their aircraft as well as insurance for the FBO’s regular customers that quality maintenance is close to hand if they need it. The Part 145 station is an authorized manufacturer warranty service center for most Gulfstreams, the BBJ, Global Express, Hawker, Falcon 50/900/2000, Citation 550/560/XL/XLS and Nextant 400XTi, and provides 24/7 AOG service.

For the first time in some three decades, Jet Aviation Geneva has a new general manager, following the promotion in March of the popular Bernard Ratsira to director of FBO client relations for EMEA and Asia. He was succeeded by João Pedro Pires Martins, most recently VistaJet’s head of global purchasing and logistics.

TAG Aviation Geneva, Switzerland

8.4

A fixture at Geneva International Airport for more than a quarter century, TAG Aviation is set to undergo a major expansion and transformation this year, according to Franck Madignier, president of TAG Aviation Engineering and FBO Services. “The facility will be completely reconfigured and refurbished to adapt to

the growing business we have, compared to previous years,” he told AIN. Currently the FBO claims a 50-percent share of the business aviation market at the airport, which has four service providers. The upgrade will add 2,700 sq ft of useable handling space to the current 3,875 sq ft in its location at the airport’s general aviation terminal, which it shares with two other providers (the fourth is in a separate location). “Definitely this new facility will have more space, with a complete reconfiguration of the passenger and crew flow,” said Madignier. “We will try to have a much better facility in terms of comfort for our passengers and also for our crews.”

Among the amenities offered are passenger lounges and a crew rest area and snooze room; shower facilities for both passengers and crew are also available, along with complimentary Wi-Fi, computers and work rooms with television. The upgrade will add audio/visual capability to the facility’s 12-seat conference room.

The location is base for 20 private jets, ranging from Citations to a Global Express, and the company also offers aircraft charter and management. “We have developed all the additional services—a one-stop shop really—including de-icing [Type I and IV], fuel [the FBO has its own 5,200-gallon jet-A tanker] and catering, and we are able to assist our customers from A-to-Z with a real focus on customer service,” noted Madignier. “Our success is clearly linked to the service given by our staff.”

The facility has nearly 65,000 sq ft of hangar space, much of which is dedicated to the company’s in-house maintenance division, and two-and-a-half acres of ramp space for aircraft parking, although more space is usually available from the airport if needed.

According to Madignier, the airport recently launched an initiative aimed at ensuring proper attention to business aviation. It has “commissioned a working group with all the FBOs to make sure that we can optimize access for business aircraft in Geneva,” he said. “The concerns are to make sure that we have slots and parking available.” The airport saw nearly 20,000 business aviation departures last year, a slight decrease over 2012, according to statistics provided by industry data monitor WingX Advance. The company noted that flights within Europe still comprise the bulk of its traffic, with large contributions from Russia and the Middle East. Lately the airport has seen an increase in flights from China.

Harrods Aviation London Luton, UK

8.2

Affiliated with the iconic department store of the same name since its purchase in 1995, the company known these days as Harrods Aviation operates a pair of FBOs in the London area, and according to sales and marketing director Will Holroyd it takes its cues from Harrods the store when it comes to training customer

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TAG Aviation • Geneva



Jet Aviation • Geneva



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service staff to a consistently high level. A member of the Air Elite Global FBO Network, the facility also participates in the group's Ritz-Carlton customer service benchmarking program.

As it has at most European FBOs, business has remained relatively static at Harrods' Luton facility—one of three providers at the airport located 30 miles from London—over the past year, with traffic from the U.S., Middle East and Africa remaining the strongest.

"We have seen an increase in the size of aircraft typically using Luton, larger Gulfstream and Global Express type aircraft being the main visitors to the FBO," explained Holroyd. "These aircraft are also parking statistically a little longer on the ramp between flights." To accommodate them, the facility has five acres of ramp space for parking jets up to a Boeing 767, plus a pair of hangars totaling 59,000 sq ft that can fit aircraft the size of a 757, as well as the location's based business jets, which range from the Hawker 800 to the G650. The facility considers itself primarily an inbound visitor-centric location and is less focused on based customers, said Holroyd, noting that 50 or so aircraft regularly visit and park at the FBO. The facility also operates its own trio of refueling trucks at Luton, the largest holding more than 10,000 gallons of jet-A, and can provide fuel directly or through any preferred provider.

As part of a \$600,000 upgrade over the past year, the 24/7 facility improved passenger and baggage screening in its purpose-built 15,000-sq-ft terminal to support recently introduced airport and UK Department for Transport regulations. To provide a more personalized and discrete service to customers, the screening area in the terminal

was relocated from its original position in the passenger lounge to a more private, previously underused area, and is now manned around the clock. The terminal features three passenger lounges, each offering personal service. Among the popular amenities are new touchscreen computers suitable for flight planning, weather watching, web browsing or online calls.

Harrods Aviation was recently accepted to the IATA Safety Audit for Ground Operations register, making it the first independent business aviation FBO to pass the stringent and detailed audit and procedures process, according to Holroyd.

Landmark Aviation Nice Cote d'Azur, France

8.2

Ranked as the third busiest business aviation airport in Europe over the past year, with nearly 16,000 private aircraft departures (WingX Advance data), Nice Cote d'Azur Airport has seen bizav traffic grow by 3 percent over the past year. "It's a good market and a growing market," noted Landmark Aviation president and CEO Daniel Bucaro, whose company has been at the airport since 2008 and currently claims 40-percent market share, with an average of 35 operations a day. Private aviation traffic at the French Riviera gateway is enough to support three service providers, which have shared an airport-supplied general aviation terminal since 2010.

"[The Landmark Aviation facility] has everything you would think," said Bucaro of the 5,000-sq-ft FBO. "It has flight planning, it has a pilots lounge, it has everything you need to be functional



Landmark Aviation • Nice



Universal Aviation • Paris

but it is contained. The airport gives general aviation only a certain spot and the three of us split it." Part of that constraint means the FBO does not operate its own hangar space, making it strictly a facility for transient aircraft, parking for which can fluctuate daily at each provider. "None of the FBOs in Nice has ramp space; it is all owned by the airport," said Nicolas Gourjon, the facility's general manager. "That means we have to make a parking request each time an aircraft lands in Nice."

Rare among European FBOs, the company operates its own fuel trucks. "When we first went into Nice, we were like everyone else," Bucaro told AIN. "We had to call Total or Shell or whoever, and depending on if they had commercial business to take care of, it could be great service or you could have to wait for a while. We worked hard to get our first truck, so we could make sure that

we could deliver the service our customers have grown accustomed to." The company added a second jet-A tanker last year, further solidifying Landmark's position. "We provide almost all the fuel [to business aviation] now, and that's a good position because we can control the time and the service we provide," Bucaro said. The location sees the full gamut of aircraft, from smaller jets from throughout Western Europe to larger airplanes from Russia and the Middle East.

Universal Aviation Paris Le Bourget, France

8.2

Universal Aviation is marking its 25th anniversary in the highly competitive Le Bourget market by refurbishing its passenger lounges. The company has occupied its current 5,400-sq-ft terminal



Harrods Aviation • London Luton

FBOs Showing the Largest Increase in Overall Average from 2013 to 2014

FBO	Airport	Airport Code	2014 Overall Average	2013 Overall Average	Change 2013 - 2014
Jet Aviation	Zurich	LSZH	7.5	6.5	1.0
Jet Aviation	Dubai International	OMDB	7.7	7.1	0.6
Jet Aviation	Geneva International	LSGG	8.5	7.9	0.6
Landmark Aviation	Paris Le Bourget	LFPB	8.0	7.5	0.5
ExecuJet Middle East	Dubai International	OMDB	8.0	7.6	0.4
Universal Aviation	Paris Le Bourget	LFPB	8.2	7.8	0.4

Source: AIN 2014 FBO Survey. Ties are listed alphabetically by FBO name.

Other Frequented FBOs in the Eastern Hemisphere

FBO	Airport Code	Airport	City
AviaPartner Executive	LFMN	Nice Cote d'Azur International	Nice
Business Flight Center	EFHK	Helsinki-Vantaa	Helsinki
Cannes Airport Handling	LFMD	Cannes-Mandelieu	Cannes
Eccelsa General Aviation	LIEO	Olbia Costa Smeralda	Olbia
ExecuJet Middle East	OMDB	Dubai International	Dubai
Harrods Aviation	EGSS	London Stansted	London
Shanghai Hawker Pacific	ZSSS	Shanghai/Hongqiao International	Shanghai
Jet Aviation	WSSL	Singapore/Seletar	Singapore
Jet Aviation	EDDL	Dusseldorf	Dusseldorf
MJets FBO	VTBD	Don Mueang International	Bangkok
Service People	EDDH	Hamburg	Hamburg
Universal Aviation	WSSL	Singapore/Seletar	Singapore
Universal Aviation	EGSS	London Stansted	London
Vienna Aircraft Handling	LOWW	Vienna International	Vienna

*These FBOs, listed alphabetically by name, received nearly enough responses statistically to qualify their ratings to be included in this report.

for the past six years. “It’s a busy FBO, so you need to keep improving what you’re offering for the customer,” said Jonathan Howells, senior vice president international with Universal Weather & Aviation. “Across Universal we now have a look and feel that we enjoy, and our customers have given us good feedback.”

The company, known for its trip-planning expertise, operates 13 FBOs worldwide. “I think the reason we have an FBO chain is that [these facilities] are really a critical part of how we manage unforeseen events,” Howells told AIN. “All sorts of things can happen to a customer: sick pilots, lost passports or AOG issues, and with our own people we can take the best care of them.”

The facility has a 32,000-sq-ft hangar that can accommodate a pair of BBJs simultaneously, and the equipment to support aircraft up to a 747. Some of the seven FBOs at Le Bourget rely heavily on based aircraft, while others skew more toward handling transient traffic. Universal, while currently home to three Sovereigns, sits in the latter camp. The company recently expanded its ramp space to eight acres to better accommodate large jetliners and is one of the few service providers in Europe to subscribe to the National Air Transportation Association’s (NATA) Safety 1st line service training program for its ramp workers. Though the airport closes to departures at 10:30 p.m., staff are available on callout for after-hours arrivals.

One key to its customer support, according to Howells, is Universal’s proprietary FBO software that is shared throughout the network and allows staff at the FBO to better prepare. “We’re able to make sure that they understand the profile and the requirements of our customers before they arrive, so really a lot of it is about anticipation, especially for long-haul crew,” he noted. “We want to make sure that their arrival process is as slick as possible with customs and immigration.”

One of the highlights for the facility is its in-house catering kitchen, run by Air Culinaire Worldwide, which Universal acquired two years ago. “They are on hand so they can come meet the flight attendants on arrival and take their special catering needs into consideration,” said Howells. “We try to give them the flavors of France, so the passengers get something different.”

Dassault Falcon Service Paris Le Bourget, France

8.0

Among the flock of FBOs at Le Bourget, Europe’s busiest business aviation airport, Dassault Falcon Service reigns as the elder

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Dassault Falcon Service • Paris

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statesman, having begun operations there nearly 50 years ago. “We’re part of the airport’s history,” explained Jean Kayanakis, the general manager of the facility, a subsidiary of the French aircraft manufacturer. “The company grew with the first Falcon 20 from Dassault and was a small FBO and flight operation and progressively expanded through

its different activities around the Dassault fleet.” Today, that small FBO has grown to include a 16,000-sq-ft terminal and a ramp encompassing four acres. A hangar added in 2012 brings total sheltered aircraft space to 65,000 sq ft. Not surprisingly given its Dassault affiliation, two-thirds of the facility’s customers are Falcon operators, but the location will

handle aircraft from any maker, up to a BBJ.

Kayanakis said he is seeing more big business aircraft at his location, which claims up to 15 percent of the traffic in what is a tight market at Le Bourget. “We are a small unique facility when the other people are mostly part of a network, so the challenge is really to stay on top of quality

ABOVE & BEYOND

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

Person	FBO	Airport Code
Francesco Cossu	Eccelsa General Aviation	LIEO
Roj Kulnaratana	MJets FBO	VTBD
Robert Glatthaar	Hawker Pacific Flight Centre	YSSY
Yvonne Chan	Universal Aviation	WSSL

when price competition is also driving the business,” Kayanakis told AIN. “It’s really important that we stay on top of what makes the difference for our customers because if we are not able to achieve that then they may be interested in getting lower priced services somewhere else from a larger company.”

Like most FBO operators in Europe, the company is still waiting for an upswing in traffic, as most of its visiting aircraft are based in Europe. “We have to recognize it’s tough,” noted Kayanakis, who also oversees the Falcon maintenance center and the executive flight department. “Overall the traffic at Paris Le Bourget has been flat; resources are stretched and competition is increasing.” North America and Africa have been sources of more traffic over the past year, according to Kayanakis.

The location’s maintenance center, one of the largest dedicated Falcon repair facilities in the world, can perform virtually any repair on a Dassault aircraft, while the charter flight operation has eight based aircraft (including a pair of Falcon 7Xs), more than half of the 15 business jets based at the facility.

The terminal features a large passenger lounge with a panoramic view of the apron, a pair of 10-seat conference rooms and a crew rest area. Each year, the FBO does its own internal customer survey and, responding to requests from crews, it plans to augment its pilot amenities with snooze rooms and showers.

ExecuJet Middle East Dubai Int’l Airport, Dubai

8.0

The only non-European FBO to make the top rungs of this year’s international FBO survey, ExecuJet’s Dubai International (DXB) facility is one of the company’s two locations in the emirate, joined last year by a sister location at Dubai World Central Airport. In operation for seven years, the 12,000-sq-ft FBO terminal is one of the largest in the region and

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features seven separate passenger lounges, each with seating for approximately 12 people.

“Privacy is important, so we assign the lounges to individual passenger groups or sometimes groups within groups, [recognizing] cultural needs,” said Mark Hardman, ExecuJet’s Middle East operations director. Other features in the terminal include

prayer rooms, a crew lounge with shower rooms, and a duty-free shop. The FBO deploys a fleet of new BMW 730s to shuttle passengers to and from their aircraft. UAE customs, immigration and police are located on site, and the location features electronic access gates for residents of Gulf Cooperation Council member states, a group that includes the UAE,

Saudi Arabia, Oman, Qatar, Bahrain and Kuwait.

The location’s 77,000 sq ft of air-conditioned hangarage is base for 20 aircraft, from a Learjet 60 to a Lineage 1000, and the operation regularly hosts larger aircraft on its 63,000-sq-ft ramp. “Basically we can handle anything they send to us,” Hardman told AIN. “A330s,



ExecuJet Middle East • Dubai

Most Rated Countries

(Based on Number of Responses)

Country	Responses
United Kingdom	267
France	244
Switzerland	135
Germany	110
Italy	107
Australia	69
United Arab Emirates	63
Spain	55
Russia	48
Singapore	40
Hong Kong	38
China	26
South Africa	23
Ireland	21
Netherlands	19
Austria	19
Thailand	17
Saudi Arabia	16
Sweden	16
Turkey	15

Source: AIN 2014 FBO Survey

777s; we haven’t had a 747, but we could handle it if need be.” While it can arrange for fueling from any provider on the field, the location signed a strategic partnership with Shell last year to be a preferred provider, offering streamlined service.

The FBO is open 24/7 and has a staff of 35 people of 12 different nationalities. “We’re lucky with the management team we have within the FBO,” said Hardman. “It’s a mix of Arabic, European and Asian, and we know we’ve got the best of all worlds [and] lots of experience.”

Last year the location saw more than 6,000 movements, part of a 100-percent growth in business at the FBO over the past two years, but according to Hardman the growth of Emirates and Fly Dubai airlines is restricting aircraft parking at the airport. Another challenge is maintaining a brisk operational tempo in the searing summer heat, although the location prides itself on taking care of its line staff, making sure they are properly rested and hydrated. March is

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high season for the FBO, with 20 percent more traffic than in other months of the year. It's a time of pleasant weather for the region and sees the annual running of the Dubai World Cup horse race.

The location has its own Part 145 repair station, approved for working on Bombardier, Embraer and Hawker aircraft,

and can perform services from line maintenance through C and D inspections. During the 10-week period of runway closures beginning this month at DXB, the company will take advantage of the lull by performing a four-year inspection on the Lineage, while [routing all transient traffic through its FBO at Dubai World Central.](#)

Landmark Aviation Paris Le Bourget, France

8.0

While Landmark's current location at Le Bourget earned enough recognition from our respondents this year to rank among the top international FBOs, the company expects



to increase its visibility and its 18-percent market share at the Paris gateway with the opening later this year of a brand-new \$4.1 million terminal to the south of its current location. At

13,000 sq ft, the new building will more than triple the size of the 3,700-sq-ft terminal Landmark has occupied since 2006. "It will have a prayer room," said Bucaro, "and all the things that you really need when you're dealing with customers who are coming from all over the world. It just allows us to serve the customer better."

Bucaro noted that the requirement to add passenger and baggage screening several years ago cramped the smaller facility, which wasn't designed to accommodate such security measures. "That's one of the benefits of being able to lay out a brand-new facility," he told AIN. "You won't see the baggage; it will go through screening in the back, not out front." The old terminal, whose pilot amenities and facilities earned its lowest scores (7.5), will remain in operation until the new building comes on line. "It will be a good facility and one that we needed," noted Bucaro. "Quite frankly, ours was not up to our standards." The former terminal will be converted into office space for tenants in a second phase of the expansion, along with the introduction of covered customer parking.

Remaining will be the location's 43,000-sq-ft hangar, which is home for eight private aircraft, from a King Air to a G550.

At Le Bourget, Landmark manages Esso's fuel farm and tanker trucks and fuels some 45 percent of the traffic at the airport, according to Bucaro. With mostly North American bases in its 57-FBO portfolio, Landmark has extended NATA's Safety 1st line service training to its French locations, for which it translated all the training materials into French. "We take the same approach whether it's Paris or Iowa," said Bucaro. "We have to have the same kind of consistency, because if customers are using us in Paris, they are probably using us in New York, Miami or Washington, and so they have to be able to rely on our consistency and our ability to service those aircraft not only from a customer service standpoint, but from a safety standpoint."

Like most of the Le Bourget FBOs, Landmark offers customs and immigration service on demand. The facility has handled significant traffic over the past year from Russia and the Middle East. □