



AIN FBO Survey

2016 • Eastern Hemisphere

Data compiled by David Leach; narrative by Curt Epstein

While business aviation usage in North America continues to creep up and some domestic service providers report business approaching or even exceeding 2007 levels over the past year, that hasn't held true for the rest of the world, for a variety of reasons.

According to FAA statistics, while U.S.-registered business jet operations grew by just over 1 percent between 2014 and 2015, that improvement came entirely at the expense of international operations. In 2014 the industry recorded a year-over-year rise of 4.57 percent in international flights at a total of 708,872, but that number fell by 3.31 percent last year, to 685,398.

"The traffic out of North America has been down a little bit in terms of legs flown, and I think that's really reflecting what's been going on in the U.S. and global economies,"

said Jonathan Howells, senior v-p international with Universal Aviation, Universal Weather and Aviation's ground handling subsidiary. "We feel there is a lot of pent-up travel waiting to happen."

Looming heavily over the global economy is the price of oil, which has lingered below \$50 per barrel for far longer than anyone in the petroleum industry could have imagined. "Of course it's a paradox: it's good for the industry in some ways, [and] it's not good for the industry in other ways," Howells told AIN.

"Right now fuel pricing has been greatly advantaged by what's going on with oil pricing, but a lot of the business aviation economy and community is driven by oil-dependent and oil-producing countries and also some of the large corporate aviation departments

around the oil industry, so oil price has a distinct impact on our industry."

"In areas where the economy relies heavily on resources, for example mines, oil and so on, the business has slowed down quite a lot in movement through our FBOs," said Gerrit Basson, CEO of ExecuJet Aviation Group. "For example, we used to be much busier through our two FBOs in South Africa and the one in Nigeria than we are at the moment because a lot of the traffic was driven by internationals and resource companies traveling through Africa to all of their assets."

The strong U.S. dollar is another factor affecting operators outside North America, said industry analyst Brian Foley. "Usually fuel is based on dollars too, and with a lot of foreign currencies not too strong right now, that can be

a disincentive to fly more," he said, pointing out that even though the cost has declined significantly, it hasn't dropped as much as it has in the U.S., with its stronger currency.

Europe

While North America might be the center of gravity of the business aviation industry, Europe represents the second largest market, and with much of the continent's economy still sluggish, the numbers are telling: 11 of the top 12 business aviation airports in Europe logged fewer movements year-over-year. The three busiest airports for business aviation—Le Bourget, Geneva and Nice Côte d'Azur—saw slides of 3.4 percent, 7.3 percent and 4.4 percent, respectively, according to data from business aviation monitoring firm WingX Advance. "I think our biggest challenge

as an industry has been global economics, and Europe has been particularly flat over the past years,” said Howells.

According to statistics from Eurocontrol, for the 44 member states that comprise the European Civil Aviation Conference, business aviation traffic represented an average of 1,797 flights per day last year, or 6.6 percent of all flights in Europe, and a decline of 2.6 percent from 2014 levels.

“It’s safe to assume that operations in Europe will be similar to last year within a percent or two and it’s not anticipated to jump in any way in the near term,” noted Foley. “You really have to follow the money, and the places where there’s not terrific growth or a terrific economy are the areas that will see the biggest impact on FBOs right now.”

At Signature Flight Support, president and COO Maria Sastre concurred that traffic in Europe has been “slack” of late. “For instance, it is fairly evident that over the past 18 to 24 months there has been a significant decline in Russian traffic and that has impacted [FBOs at] several European locations,” she told AIN.

This has not deterred Signature from expanding in Europe, for example the new FBOs at London Luton (where it will open a new terminal toward the end of this year), Manchester and Nice Cote d’Azur that it added with the acquisition of Landmark Aviation. Along with all other former Landmark FBOs, these new bases have already fully adopted the Signature brand. In April, Signature added bases at Milan Linate and Malpensa Airport, as well as at Rome and Venice, when it bought a 60-percent stake in Italy’s Prime Aviation Services.

While U.S. bizav traffic into Europe rose last year by 3 percent according to data from Argus, WingX noted private jet flights there from around

the world were basically flat last year (-0.5 percent) compared with 2014, while the number of departures from the top three business aviation user countries (France, Germany and the UK) saw growth in 2015 of 3.3 percent, 2.4 percent and 1.2 percent, respectively. “You’ve just got ongoing sluggishness rather than a significant decline,” said industry analyst Richard Aboulafia. “Not terrible, but nothing that resembles a V-shaped recovery.”

The European market is split between long-range aircraft and the smaller aircraft, with markedly different activity in those sectors, said Basson, whose company operates a dozen FBOs in the region. “We still attract good market share from those long-range aircraft that fly a lot either from the U.S. into Europe or just around Europe, so that part of the business is good.” However, the company still sees an overall weak market in the region.

Other possible influences hindering business aviation in Europe are political instabilities in areas such as Southeastern Europe, Turkey and Syria as well as geopolitical strife involving Russia. “One of the things that is irritating Europe and making it even more difficult to recover is the instability with Russia,” said Foley. “That’s all contributing to fewer flights in the European area.” Indeed, according to the WingX statistics, flights from Russia to Europe were down 27 percent last year.

South America

Brazil, another of the BRIC countries, has one of the world’s largest business aircraft fleets but it has been shaken by recent economic events. “I’d almost call [the market] distressed right now because of its economy and currency,” noted Foley. “The effect of oil prices has really taken the wind out of the sails down there, and that will continue for at least

the next couple of years.” U.S. business flights to Brazil slumped by more than 25 percent last year, according to statistics from Argus, which noted an overall slide of 17 percent to South America year-over-year.

“Domestic traffic within Brazil is down,” Howells told AIN. “There have been a lot of pressures on corporate aviation departments, and I think fewer airplanes are flying within Brazil and to Brazil, reflecting what’s going on in the world economy.” The country expects this summer’s Olympics to provide a major, albeit temporary, economic respite, and its FBOs are expecting scores of visiting aircraft.

Likewise Venezuela, an economy that also relies heavily on petrodollars, has seen business aircraft usage decline, according to Howells, whose company operates the general aviation facility at Aruba’s Queen Beatrix International Airport. “Until six or nine months ago we had a tremendous amount of traffic between Venezuela and Aruba. With what’s going on in the Venezuelan economy and oil pricing, we’ve seen a significant downturn in activity there.”

Signature’s Sastre described the Caribbean and Latin America as among “the more exciting opportunities” it has. The U.S.-based group is now looking to open bases in Panama, Mexico and Colombia. It already has a long-standing joint venture with Lider in Brazil, and also has FBOs in San Juan (Puerto Rico), Saint Martin, Antigua,

St. Kitts and Nevis, as well as a licensing agreement in Turks and Caicos.

China

During the depths of the global economic downturn, business aviation looked to China as the emerging market that could be the savior of the industry. Optimism, fueled by a flurry of initial orders, has since cooled. “Business aviation really took off when the economy was doing well, when there were more and more self-made millionaires and billionaires and the stock market was on a tear, but since then things have almost completely reversed and the economy is not doing as well,” said Foley.

“There’s an austerity movement by the government that looks down on those who use corporate jets.” He likened the situation to the one several years ago in the U.S. when business aviation was vilified after the heads of two major auto manufacturers arrived in Washington on their corporate jets to beg for government financial bailouts. “That just seems to be a common theme when times are tough in any specific region of the world,” explained Foley. “Business aviation seems to take a blow and some criticism until things are good and everyone is happy.”

Despite this, however, business aviation continues to operate to and in China. Flights by U.S.-registered aircraft to China were up by 14 percent between 2014 and 2015, according to data from Argus. The Shanghai Hawker Pacific Business Aviation Centre, one of the few

Gift Card Winners

As an incentive to participate in the 2016 FBO Survey, we offered to select 10 respondents randomly and award each a \$200 Amazon gift card. Below are the winners:

Dave Farris (chief pilot), Randy Hellerich (chief pilot), Philip Gebbie (asst chief pilot), Douglas Hunt (captain), Matthew Jung (pilot), Christian Memmott (director of aviation), Steven Boyd (corporate pilot), Jon Blackwell (chief pilot), Lauren Behrens (captain), Larry Walter (captain)

western-style FBOs in China, reported a 16-percent uptick in activity last year, as well as the busiest single month in the facility's history. "Shanghai continues to be the center for business in China, and both the Asian and international business communities keep flying whatever the daily economic news or drama," said Carey Matthews, the company's general manager. "The numbers verify that business aviation is taking a deep root into the economic environment of China and is more robust than many are giving it credit for." Overall, Argus noted, U.S. traffic to Asia was up by 6 percent last year.

Signature, which has an established joint venture at the Hong Kong Business Aviation Centre, has not joined the rush to provide service in mainland China. While acknowledging that the country's emerging business aviation sector needs professional handling services and facilities, Sastre indicated that regulatory restrictions and a lack of infrastructure mean that it is not necessarily possible or viable for companies to "do business effectively" in China. "There are so many other opportunities around the world and so many other places where we can focus on creating

value," she concluded.

Putting the challenges posed by China to one side, Sastre said that Signature has been able to operate successfully at locations outside North America "where there is nothing we can do to improve the infrastructure, and some of these places are the top-ranked in our customer feedback." As it continues to absorb the former Landmark bases, the group is making a major investment in staff training and facility upgrades to ensure service consistency throughout the network.

All those factors contribute to the industry holding its breath amid the fragile

recovery. "We still look over our shoulders back to 2008, which was the peak of the business aviation industry, and since that moment I think we've always been looking and saying, 'Next year will be a better year,'" observed Universal's Howell. "Business aviation is in a new norm, and the only thing that is going to trigger a spurt in growth is when the economy settles and when oil pricing returns to an appropriate level and when some of the geopolitical issues in the world get tidied up. Those things, unfortunately, are really outside our control." □

New Rating Scale

For our new FBO Survey platform **AIN** changed the evaluation scale to a 1-5 scale, with 5 being the highest; previously it used a 1-10 scale, with 10 being the highest. The 1-5 scale presents respondents with a simpler range to use during the evaluation process, with 3 representing average, 5 well above average and 1 well below average.

*This year's annual FBO Special Report marks the start of a new process by which **AIN** collects and reports customer feedback from around the world. Earlier this year we launched our FBO website, which can be accessed anytime at www.ainonline.com/fbosurvey. This mobile-friendly website allows our readers to view, comment on and evaluate FBOs at any time that suits them, year-round. On this site we have compiled all the FBO comments and evaluations that **AIN** has collected over the past four years—so the average scores that you will find on the site reflect a cumulative average and not a single year in isolation.*

Launching this approach, the 2016 FBO Report on the following pages looks at aggregated average scores over the past four years broken out with our usual charts showing the FBOs rated most highly overall and those broken out by region. This marks a major departure from our traditional report as an annual feature built on responses gathered during a defined survey period, which has been in existence for the past 30 years.

We believe this new survey format provides both a more compelling way for business aircraft operators to make their preferences known and a more relevant assessment of service providers.

***AIN** has always prided itself on innovative and trustworthy coverage of key sectors of the business aviation industry. By modernizing our approach to surveying FBO customers over the years, we have ensured that we present the most credible and independent assessment of service providers in this industry.*

The survey process is now far more interactive and meaningful for the pilots who participate. The new process still ensures that only qualified readers are able to give their ratings and that each participant's rating of an FBO counts only once. So, if Captain Joe Smith rated XYZ FBO at ABC Airport in 2014, and then rated the same FBO at the same airport again in 2016, the only rating counted is the most current, 2016 rating.

We are confident that giving users the mechanism to rate FBOs in real-time will ensure a more comprehensive survey and so deliver a more accurate assessment of the companies that support operators around the world.

— D.L.

TOP RATED FBOs IN EUROPE, MIDDLE EAST, AFRICA AND ASIA PACIFIC 2013-2016 (BY OVERALL AVERAGE AS OF APRIL 1, 2016)

FBO	AIRPORT	AIRPORT CODE	OVERALL AVERAGE	LINE SERVICE	PASSENGER AMENITIES	PILOT AMENITIES	FACILITIES	CSRs
TAG FARNBOROUGH AIRPORT	FARNBOROUGH	EGLF	4.68	4.49	4.71	4.72	4.84	4.64
UNIVERSAL AVIATION	LONDON STANSTED	EGSS	4.57	4.78	4.45	4.53	4.41	4.76
ECCELSA AVIATION	OLBIA COSTA SMERALDA	LIEO	4.49	4.35	4.65	4.30	4.59	4.58
MJETS FBO	DON MUEANG INTERNATIONAL	VTBD	4.48	4.32	4.61	4.34	4.59	4.56
KLM JET CENTER	AMSTERDAM SCHIPHOL	EHAM	4.46	4.54	4.46	4.32	4.51	4.47
LANDMARK AVIATION*	NICE COTE D'AZUR INTERNATIONAL	LFMN	4.40	4.29	4.50	4.42	4.39	4.44
TAG AVIATION	GENEVA INTERNATIONAL	LSGG	4.38	4.36	4.56	4.27	4.42	4.29
JET AVIATION	GENEVA INTERNATIONAL	LSGG	4.34	4.43	4.35	4.25	4.33	4.35
EXECUJET ZURICH	ZURICH	LSZH	4.31	4.26	4.51	4.10	4.51	4.10
HARRODS AVIATION	LONDON LUTON	EGGW	4.29	4.20	4.52	4.10	4.30	4.30
EXECUJET DUBAI	DUBAI INTERNATIONAL	OMDB	4.24	4.09	4.39	4.14	4.34	4.21
DASSAULT FALCON SERVICE	PARIS LE BOURGET	LFPB	4.23	4.44	4.30	4.03	4.16	4.23
LANDMARK AVIATION*	PARIS LE BOURGET	LFPB	4.23	4.39	4.24	4.10	4.12	4.33
UNIVERSAL AVIATION	PARIS LE BOURGET	LFPB	4.19	4.47	4.00	3.98	4.04	4.57
ABELAG AVIATION (EXECUJET)	BRUSSELS NATIONAL	EBBR	4.18	4.09	4.21	4.18	4.21	4.25
SIGNATURE FLIGHT SUPPORT	PARIS LE BOURGET	LFPB	4.15	4.18	4.29	4.02	4.12	4.17
HONG KONG BUSINESS AVIATION CENTRE	HONG KONG INTERNATIONAL	VHHH	4.10	4.21	4.16	3.99	4.09	4.07
SWISSPORT EXECUTIVE	NICE COTE D'AZUR INTERNATIONAL	LFMN	4.05	4.22	4.04	3.82	3.96	4.26
JETEX FLIGHT SUPPORT	PARIS LE BOURGET	LFPB	4.02	3.98	4.21	3.98	4.07	3.81
JET AVIATION	DUBAI INTERNATIONAL	OMDB	4.01	4.06	4.06	3.89	4.02	4.03
SIGNATURE FLIGHT SUPPORT	LONDON LUTON	EGGW	4.01	4.31	3.90	3.87	3.81	4.24
AVIAPARTNER EXECUTIVE	NICE COTE D'AZUR INTERNATIONAL	LFMN	3.97	4.03	4.10	3.95	3.95	3.77
VIENNA AIRCRAFT HANDLING	VIENNA INTERNATIONAL	LOWW	3.91	4.00	3.81	3.90	3.88	4.00
JET AVIATION	ZURICH	LSZH	3.86	3.90	3.87	3.78	3.79	4.02
CAPITAL JET/CJET (NOW MILLION AIR BEIJING)	BEIJING CAPITAL	ZBAA	3.36	3.45	3.47	2.97	3.55	3.33
VIPPORT VNUKOVO-3	MOSCOW VNUKOVO	UUWW	3.29	3.45	3.65	2.87	3.09	3.46

Ties are listed alphabetically by FBO name. *Acquired and rebranded as Signature Flight Support after the survey period.

OTHER FREQUENTED FBOs IN THE EASTERN HEMISPHERE

FBO	AIRPORT	CODE	CITY
HAWKER PACIFIC FLIGHT CENTRE	SYDNEY KINGSFORD SMITH	YSSY	SYDNEY
GRAFAIR JET CENTER	STOCKHOLM CITY/BROMMA	ESSB	STOCKHOLM
SERVICE PEOPLE	HAMBURG	EDDH	HAMBURG
UNIVERSAL AVIATION	SYDNEY KINGSFORD SMITH	YSSY	SYDNEY
JET AVIATION	DUSSELDORF	EDDL	DUSSELDORF
SKY VALET CANNES	CANNES-MANDELIEU	LFMD	CANNES
MALLORCAIR	PALMA DE MALLORCA	LEPA	PALMA
HARRODS AVIATION	LONDON STANSTED	EGSS	LONDON
JET AVIATION	SINGAPORE SELETAR	WSSL	SINGAPORE
BIGGIN HILL EXECUTIVE HANDLING	BIGGIN HILL	EGKB	LONDON
NORTHOLT JET CENTRE PREMIER PASSENGER SERVICES	RAF NORTHOLT	EGWU	LONDON
BUSINESS FLIGHT CENTER	HELSINKI VANTAA	EFHK	HELSINKI
DHABIJET FBO	AL BATEEN EXECUTIVE INTERNATIONAL	OMAD	ABU DHABI
SIGNATURE FLIGHT SUPPORT	MUNICH	EDDM	MUNICH
ADVANCED AIR SUPPORT	PARIS LE BOURGET	LFPB	PARIS
EXEJUJET BERLIN	BERLIN SCHOENEFELD	EDDB	BERLIN
UNIVERSAL AVIATION	SINGAPORE SELETAR	WSSL	SINGAPORE

These FBOs received nearly enough responses to qualify.

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. These four people/groups were listed repeatedly.

PERSON	FBO	AIRPORT CODE
GUÉMAR GREVET	AVIAPARTNER EXECUTIVE	LFMN
AMANDA LI	HARRODS AVIATION	EGGW
ROJ KULNARATANA	MJETS FBO	VTBD
RECEPTION TEAM	TAG FARNBOROUGH	EGLF

FBO Survey Rules and Methodology

This report of AIN's FBO survey covers FBOs in the Eastern Hemisphere. Last month's report covered FBOs in the U.S., Canada, Mexico, South and Central America and the Caribbean—the Western Hemisphere.

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

In 2006 AIN moved the FBO survey online. AIN has continued to add FBOs each year, and now offers our respondents a comprehensive list of 4,500 FBOs worldwide.

This year AIN collected FBO feedback via a new website integrated into ainonline.com. Qualified users were asked to create a username and password that will allow them to access this website into the future, both to provide further feedback and to research FBOs. This new website will be available to our subscribers at any time that suits them, year-round.

Between December 15 last year and February 12 this year AIN invited all qualified subscribers to participate in the survey. We contacted them via e-mail, announcements in AIN's e-newsletters and in the January issue of *Aviation International News*.

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 5, 1 being the lowest and 5 being the highest. This is an adjustment from our previous 1-to-10 scale.

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.

To mark the launch of our new FBO website at ainonline.com, this year's FBO Survey shows the cumulative average rating from responses collected over the past four years. Only the most recent rating of an FBO is counted on a per-user basis. To view this new FBO site, please visit www.ainonline.com/fbosurvey. —D.L.



4.68

TAG Farnborough

London, UK

Since it took over the management of Farnborough Airport from the UK's Ministry of Defence 13 years ago, TAG Aviation has invested \$150 million in infrastructure, and that has served to make it the highest-rated European business aviation facility in AIN's survey for the past several years. In addition to the FBO, the company operates an on-site luxury hotel

(the Aviator) and separate pub (the Swan).

While FBOs outside North America tend to lag in terms of scores, TAG Farnborough's rating of 4.68 is high enough that the facility would place among the top 10 percent of North American service providers. The dedicated business aviation airport received the highest overall

category score for its facilities. It also scored highest among non-Americas FBOs in the categories of passenger amenities and pilot amenities.

Over the past year, the FBO relocated its administrative staff from the 50,000-sq-ft terminal to another building in a nearby office park. In the reclaimed 12,000 sq ft of space it added a VIP customer lounge that can accommodate up to 60 people for high-volume flights, crew snooze rooms, work area, shower facilities and gymnasium. A new airport "fast track" entrance dedicated to customer use has also been opened, and the location offers "drive-through immigration clearance" for those flights that are not met upon landing by a Border Force agent.

With 25,000 movements last year, the airport saw 1.4 percent growth in operations, according

to CEO Brandon O'Reilly, who noted a continuing trend of higher-volume flights. "The use of airliner-derived business jets continues to increase at TAG Farnborough, with a record 939 movements accommodated last year."

No aircraft with a published mtow of more than 80 tons can use the airport, which is home to 45 based aircraft, sheltered in the FBO's 329,500 sq ft of hangar space, and outdoor parking is never a problem with 1.3 million sq ft of ramp. Farnborough is open from 7 a.m. until 10 p.m. during the week, and from 8 a.m. until 8 p.m. on weekends. O'Reilly told AIN that "an airspace change proposal has been submitted to the UK Civil Aviation Authority, which, if successful, will deliver more efficient airspace around Farnborough."



4.57

Universal Aviation London, UK

Established at London Stansted Airport in 1984, Universal Aviation (the FBO arm of Universal Weather and Aviation) has seen a bounce-back in traffic from the recession, according to Sean Raftery, managing director of Universal Aviation UK and Ireland. The location has seen steady gains over the past 24 months.

“I believe this is mainly due to the growing interest in London Stansted Airport,” noted Raftery. “There are several airports around London that are available to business aviation, but London Stansted is popular as it operates 24 hours, has a 10,000-foot runway and is easy to operate in and out of.”

The facility, one of four at the airport, can handle widebodies and, as Raftery told AIN, it has “many customers who bring their 767, 747 and A340 to the FBO.” Normal business hours are 7 a.m. until 10 p.m. with after-hours call-out available. Twenty percent of the traffic to the FBO operates outside regular business hours.

The two-story, 11,000-sq-ft stand-alone facility was remodeled in 2012 and has an on-site customs and immigration office, with clearance conducted on board the aircraft or in the arrivals lounge. Among the other amenities

are a departure lounge, crew lounge, crew business center and separate drivers’ lounge.

The FBO is also home to Universal’s 24/7 European operations center and its air passenger duty administration service, which equips the company to handle customer inquiries more efficiently. “It is commonplace to answer a question on Stansted customs, then another on Stansted ramp access followed by a flight plan question and then an inquiry on EU aircraft importation or EU tax rules all in the same breath,” said Raftery. With security a major concern these days, the FBO just completed an upgrade

of its CCTV system. The location has a recently enlarged 40,000-sq-ft private ramp, and while it does not possess any hangar space of its own, it has made arrangements for third-party hangarage at the airport.

Universal Stansted’s 50 staff members earned the highest scores among non-American FBOs in the categories of line service and customer service representatives, at 4.78 and 4.76, respectively. “We are living in a more regulated world that is ever changing,” said Raftery. “The aim is to stay ahead of unforeseen events, reducing our clients’ operating stress and risk.”



4.49

Eccelsa Aviation

Sardinia, Italy

Eccelsa Aviation, wholly owned by Olbia Airport Management, has been the lone service provider at Italy's Olbia Costa Smeralda Airport since 2003. Located on the island of Sardinia, the location serves as a gateway to the Mediterranean yachting and resort scene, and handled 10,000 aircraft movements last year.

"Our destination is primarily leisure and the seasonality is strong; therefore, the traffic concentration in the summertime is somewhat significant," said general manager Francesco Cossu. "We have seen an exciting aircraft type evolution in the past decade and now

the airliners in private configuration flying to Olbia in the summertime are a fairly significant number," he added, noting the traffic is not just BBJs and ACJs, but also larger aircraft up to 747s.

The location has 27 acres of ramp and, when necessary, access to a portion of the airline ramp, but at peak times traffic at the location can nearly fill that as well. Eccelsa has an agreement with sister company Meridiana Maintenance to use its 54,000 sq ft of hangar space, as well as provide customer aircraft repairs and servicing. One of the location's most popular features is

the aircraft canopy attached to the FBO, a rarity in Europe. The current 43,000-sq-ft terminal, built in 2009, provides a variety of passenger amenities, which earned the location its highest score of 4.65. Along with passenger and crew lounges, there are plenty of diversions for customers: a restaurant and bar area, shopping (luxury eyewear, cosmetics, shoes and perfumes), a gourmet food and wine shop and a jeweler.

The facility is also home to a seasonal Bombardier aircraft sales office and the sales office for a yacht manufacturer. Under construction is

a spa facility, which will be available to both passengers and crew.

Eccelsa, the first FBO in Italy to obtain handler certification from the Italian Civil Aviation Authority (ENAC), is open from 6 a.m. until 11 p.m., with 24-hour callout service available. All staffers (the total reaches 45 in peak season) are fluent in English, while some are also conversant in Arabic and Russian, reflecting the service provider's clientele. "We are a service provider and we are conscious that in the industry of services, service is everything," Cossu told AIN.



4.48

MJets

Bangkok, Thailand

MJets, the only non-European service provider to reach the highest rungs of the AIN International FBO Survey this year, was established in 2010 at Bangkok Don Mueang Airport, where it remains the only official FBO. Last October the company, which also provides aircraft charter service, became the first in the world to achieve both International Standard for Business Aircraft Operations (IS-BAO) and International Standard for Business Aircraft Handling (IS-BAH) certification from the International Business Aviation Council (IBAC).

The facility handles 95 percent of the business aviation traffic at Don Mueang, including ground handling for all foreign-registered private aircraft with an mtow of less than 45

tons. Last year that translated into 1,334 flights, a 3 percent improvement over 2014's total, according to Jaiyavat Navaraj, executive chairman of MJets. He expects to see the same level of growth this year.

Covering 13,000 sq ft, the terminal provides a reception area, executive passenger lounge, business center, complimentary Wi-Fi, crew lounge with recliners, shower facility, meeting rooms, on-site immigration office and security screening checkpoint. "Our services are similar to [those of] other world-class FBOs; however, with the CIQ onsite and our well trained service team, we can process passengers and crew of private jets through our facility quickly and hassle free," Navaraj told AIN.

In February the company began construction on a \$7 million project that will construct a new terminal, more than twice the size of the existing building, along with two more hangars totaling nearly 54,000 sq ft, able to accommodate a BBJ or ACJ. Once complete in September, they will give the location more than 86,000 sq ft of indoor aircraft storage. "In my opinion, the FBO business will move toward service quality and flow speed, rather than a super-luxurious facility," noted Navaraj. "Don Mueang has become so congested that [airport manager Airports of Thailand] has imposed a maximum 48-hour layover for private or business jets unless they have booked parking space in a hangar. A layover longer than

48 hours will require repositioning to another airport."

The location is in operation 24/7 and has a staff of 170, including ground handling agents, line service and maintenance staff. Its Cessna-authorized service center provides 24-hour AOG response.

In 2014 MJets expanded outside Thailand, opening a base at Myanmar's Yangon International Airport, a joint venture with the Wah Wah Group, Myanmar's leading aviation business enterprise. Located next to the airport's domestic passenger terminal, the two-story facility has an executive lounge with a shower facility, a business center, four crew dayrooms and an office for flight planning and crew briefings.



4.46

KLM Jet Center Amsterdam, Netherlands

While KLM Jet Center has served GA traffic at Amsterdam Schiphol Airport for 30 years, it has been in its current facility at the shared general aviation terminal (GAT) only since 2011. Its location offers a reception desk in the main passageway; a passenger lounge with minibar; an A/V-equipped conference room with coffee machine; crew lounge with pool table, darts, TV/DVD and video game console; and a flight preparation center with computers and printer. Using Newspapers Direct, customers can print 300 publications from around the world. Soft drinks, wine, snacks and Wi-Fi are complimentary.

KLM Jet Center also has an agreement with Summum Lounge, which operates a facility in the GAT offering more luxury meeting rooms and the option for on-site meals provided by Michelin Star restaurants, allowing customers to fly in, meet and dine while the aircraft is being serviced, all requested and invoiced through the FBO. It has a similar billing relationship

with nearby FAA- and EASA-approved MRO provider Jet Support for maintenance services.

The facility is open in accordance with airport GA regulations, from 6 a.m. until 11 p.m., but for special needs the FBO can request an extension, said general manager Edwin Niemöller. The company also operates the Rotterdam Jet Center, which offers 24/7 operations just 60 km away. The Schiphol location, which claims 90 percent of the GA traffic at that airport, saw 9,100 movements last year, 2 percent more than in 2014. While Niemöller noted a sharp slide in smaller aircraft over the past year, it was offset by use from larger aircraft. “This is mainly the effect of an increase in long-haul traffic, especially U.S. traffic,” he told AIN. The GAT’s ramp has allocated spaces to handle bizliners such as BBJs and ACJs, and with coordination with the airport authority it can accommodate even larger airplanes.

“Operators are focusing more on

quality and safety management in ground handling,” said Niemöller. “The FBO business is getting more professional to meet this demand for quality and safety control. Introduction of an industry standard [IS-BAH], which I applaud, is a good example.” With that mindset, not surprisingly Niemöller’s facility earned its highest score (4.54) in line service. All 14 members of the location’s ramp team are trained in all operations, from fueling to de-icing to lav service, and two of the staff are certified instructors, ensuring line service training is always current.

One of the location’s biggest strengths lies in its employees who have been with the company for years. “The biggest asset is that they are committed and know a lot of our customers by heart,” said Niemöller. “It’s vital to know what your customer is looking for, and trying to answer the question before it’s asked is how we try to differentiate ourselves from our competition.”



4.40

Landmark Aviation

(acquired and rebranded as Signature Flight Support after the survey period)

Nice, France

The Landmark Aviation FBO at Nice Cote d'Azur International Airport has earned recognition in the AIN FBO Survey in the past, and that trend continues this year, with the facility (part of BBA Aviation's purchase of the Landmark chain earlier this year) now branded as Signature Flight Support. According to general manager Nicolas Gourjon, the transition from one company to another went smoothly, both for the FBO staff and for its customers, thanks to the efficiency and professionalism of Signature's European operations team.

The location claims 40 percent of the GA traffic among

the three service providers, which share identical space in the airport's general aviation terminal (GAT). Each currently occupies 11,000 sq ft of the building, and Signature offers a pilots' lounge, flight-planning room and passenger lounge. To make more room for customers the FBO relocated some of its administration staff offsite, and discussions continue with the airport authority to enlarge the available space, possibly by year-end. That can only serve to enhance the location, which earned its highest score in passenger amenities (4.50). It refurbished its lounges last year and recently

introduced valet service for customers who wish to simply pull up to the front door and not worry about their cars.

The 24/7 FBO saw a 3-percent gain in traffic last year over 2014, and like most of the FBOs on this list, reported a rise in long-range aircraft movements, 25 percent year-over-year in this case. The airport authority controls the ramp space, so aircraft of any size can be accommodated. Uncommon at most European airports, the location operates its own pair of refuelers.

The location has a staff of 65, and employees speak French, English, Russian,

Chinese, Spanish, Italian, Swedish, Czech and Portuguese, to name a few, as befits the French Riviera's reputation as an international playground.

Given the lack of hangar space at the airport, the service providers at Nice primarily serve transient customers, and that makes them more aware of the global fluctuations. "We noticed that it is getting harder to make long-term plans, and the impact of the economy and crisis is driving our market," Gourjon told AIN. As an example, he noted, since last summer the location has seen less Russian traffic but gains from the U.S. and China.



4.38

TAG Aviation Geneva, Switzerland

Little more than a year since a major renovation and refurbishment of its FBO at Geneva International Airport, which added 2,700 sq ft of space and separate entrances for passengers and crew, TAG Aviation Geneva continues to refine comfort and privacy for its customers, noted Franck Madignier, president of maintenance and FBO services for TAG Aviation Europe.

Given the airport's binational status, perched on the border between Switzerland and France, the TAG facility offers on-site customs and immigration for both countries, as well as concierge service

for accommodations, ground transportation (even helicopter booking), complimentary Wi-Fi, three passenger lounges with business and entertainment features and a 12-seat A/V-equipped conference room, all of which combined to give the FBO its highest category score (4.51) in passenger amenities. It also has a flight-planning room, crew lounge, relaxation room, snooze room and kitchen.

The location, which claims more than half the private aviation traffic among Geneva's four service providers, is home to 20 turbine aircraft, from Cessnas to a Global, and like many international service

providers it sees the pendulum swinging toward bigger aircraft. "We continue to receive a growing percentage of large-cabin aircraft in Geneva," said Madignier. "Many of these arrive from destinations in Europe, with more too from Asia, the Middle East and the Commonwealth of Independent States."

Madignier said the facility handled 17,000 movements last year, a decline of 5 percent from the previous year, a deficit he attributes at least partly to less activity from Eastern European countries, along with difficulties obtaining slots and parking constraints

at the airport. TAG, which is a stakeholder in a working group addressing those problems, shares 10 acres of ramp with its EASA and FAA Part 145 maintenance department, which has 65,000 sq ft of hangar space.

The location, like the airport, is open from 6 a.m. until 10 p.m., but Madignier noted his team will do whatever is requested to accommodate customer needs. The FBO has a staff of 35, including fueling and de-icing specialists. They are led by Erturk Yildiz, who has served as general manager of the facility for more than a quarter century.



4.34

Jet Aviation Geneva, Switzerland

While the volume of business aviation traffic at Geneva International Airport declined by 5 percent last year, Jet Aviation's FBO there managed to eke out a gain of 2 percent, noted Joao Martins, the location's manager of FBO services. "We're actually flying against the trend," he told **AIN**. So far this year, Martins has noted business is above the pace set last year, with customer aircraft typically in the midsize class and up. "We are also seeing some private widebodies such as the 747 and A340, although this is normal in Geneva during the first quarter because of the ski season," he said.

The facility has 28,000 sq ft of ramp parking and access to a 43,000-sq-ft hangar through

the Jet Aviation Geneva maintenance facility, a Part 145 repair station that provides AOG service and is authorized to work on most Gulfstreams, the BBJ, Bombardier Globals, Hawkers, Dassaults and smaller Citations. While the hangar is normally occupied with maintenance projects, Martins said the two divisions have always been able to accommodate customers.

In operation since 1969, the facility recently underwent a major renovation, which added a second floor and more customer space. It now occupies 7,000 sq ft with three private passenger lounges, a luxury passenger bathroom with showers, a pair of A/V-equipped conference

rooms, a pilots' lounge with separate snooze room and a crew bathroom and showers. According to Martins, the company is looking to enlarge the crew rest area further.

Introduced over the past year was the position of customer care coordinator, a customer service representative dedicated to welcoming and taking care of customers and crews upon arrival or departure from the FBO, which is normally open from 6 a.m. until 10 p.m. but can accommodate earlier or later operations on request.

It has a staff of 25, all of whom have received customer assistance training in addition to other mandatory internal and external training in categories

such as ramp safety, fire and hazardous items. The location's line service crew earned its highest score among **AIN**'s readers with a 4.43.

Martins describes the company's relationship with the airport authority as very good, adding that the two are working together to alleviate some of the problems business aviation faces at the airport, such as slot and parking restrictions.

Regarding the current operating climate for service providers, Martins expects the consolidation trend in the U.S. to extend to Europe as well. "Europe represents a mature FBO market, and stronger FBOs will need to expand by acquiring or partnering with smaller FBOs," he said.



4.31

ExecuJet Zurich

Zurich, Switzerland

It has been a busy year for Switzerland-based ExecuJet. A subsidiary of the Luxaviation Group, the company has added 13 FBOs to its network, and the Zurich location was the first in that country to receive certification under the International Business Aviation Council's (IBAC) International Standard for Business Aviation Handling (IS-BAH). As part of its safety commitment, ExecuJet established a structured staff training program that extends throughout its FBOs worldwide to share best practices.

The Zurich location, which has been in operation since 2001, saw 15 percent more movements last year, climbing to 6,900 from 6,000 in 2014. FBO manager Basil Gamper expects that number to top 7,200 this year. During the annual World Economic Forum, held each year in the nearby resort town of Davos, ExecuJet handled 250 aircraft movements and pumped 114,000 gallons of fuel at Zurich and the Dübendorf military airfield, which handles overflow parking during

the event. One of three FBOs at Zurich, the facility has 12 line technicians, who receive training through the Shell Fuel program, and many have been with the location from the beginning.

ExecuJet is open from 5 a.m. until 10:45 p.m. and claims to be the only service provider on the airport that operates a private hangar, private ramp and facility reserved solely for its customers. The 27,000-sq-ft hangar is home to a pair of Falcon 7Xs, a G550 and a trio of smaller jets (a Learjet 45, Phenom 300 and Phenom 100). Its 43,000 sq ft of ramp can accommodate a pair of large-cabin business jets for overnight parking, while still leaving space for arriving aircraft. "Aircraft will always be parked directly in front of the ExecuJet Zurich FBO, which means minimal time is spent between the aircraft and the passengers' onward transport," said Gamper, who has noted the proliferation of new long-range aircraft such as the G650 and Globals in the European market. "This trend represents

a challenge for smaller FBOs that might not have the capacity or resources to support these larger aircraft," Gamper told AIN.

Over the past year, the terminal's passenger lounges were remodeled, and the facility also installed more crew and passenger parking spaces, now offering nearly 5,400 sq ft for vehicle accommodations. The location, which has its own security screening, customs clearance and passport control, received its highest scores in the categories of passenger amenities and

facilities, earning a 4.51 in both. It has eight "flight administrators" (CSRs) responsible for flight operations and customer care, along with one porter driver who takes care of passenger arrival, crew transport and car parking. "One unusual service ExecuJet Zurich provides is the pre- and post-flight checks for Rega [the Swiss Air Rescue Service], which is located in the same building," said Gamper, adding that this type of support requires great attention to detail to ensure high safety standards. □

AIN's FBO SURVEY BY THE NUMBERS

Number of FBO evaluations provided by all respondents	27,540
Number of respondents who evaluated at least one FBO	5,013
Number of FBOs evaluated by at least one respondent	2,164
Highest number of evaluations received by one FBO	407
Number of FBOs in the Americas that received the requisite number of evaluations (30) to be eligible to have an overall average displayed.	192
Number of FBOs in the Rest of World report that received the requisite number of evaluations (30) to be eligible to have an overall average displayed	27
Number of countries having FBOs that were evaluated	95

* By the numbers shows the cumulative statistics from AIN's FBO Survey over the past four years