

# AIN FBO SURVEY

2012 > EUROPE, MIDDLE EAST, ASIA AND AFRICA



TAG Aviation Farnborough

## Perennial top FBO performers enhance facilities and services

**8.8** TAG Aviation Farnborough

Huge opportunities in the East offset by tough market conditions in the West is a simplistic but not inaccurate way to summarize the current state of the international FBO business these days. Business aviation traffic has recovered to some extent in Europe, but trading conditions there are still made hard by a combination of economic woes and rising costs.

Beyond Europe, traffic growth rates are often exponential but the fact remains that in many parts of emerging markets such as Asia, the Middle East and Africa, the traditional FBO as conceived in the core U.S. market barely exists in any meaningful sense. At many locations aircraft operators still have to depend on whatever ground support they can find, often with the help of expert trip planners and their local staff.

This picture is changing, with companies such as Hawker Pacific pioneering the FBO business model in China (see article on page 27) but there remain significant obstacles to delivering Western standards of service and convenience around the globe. For example, bureaucratic and political barriers to building new FBOs at airports still stand in the way of progress in many places.

At the same time, there are still companies wanting to pursue opportunities in the far more mature market of Europe, such as Dubai-based JetEx, which has launched a joint venture at Shannon on the West coast of Ireland as well as opening yet another FBO at Paris Le Bourget Airport.

For this year's special report on international FBOs, AIN's reporters have provided some timely snapshots of how new service standards are being rolled out in the industry's new markets, with reports from Russia, Asia and Africa, as well as from Europe itself. —C.A.

Since acquiring the rights to run the former UK government airfield at Farnborough, southwest of London, 15 years ago, TAG Aviation has spent more than \$160 million on modern facilities and infrastructure. Its FBO operates as TAG Farnborough Airport and includes a main terminal, control tower, on-site radar and two three-bay hangars that offer 240,000 sq ft of maintenance, office and storage space.

Half of that area comprises the recent addition to the FBO's main capacity of a 120,000-sq-ft building that became operational last October—but only after a cautious TAG had postponed expansion at the beginning of the downturn in 2008. Under a plan approved in 2000 (operations began in 2003), a third hangar will be added to the existing two as TAG

continues infrastructure development.

Chief executive Brandon O'Reilly said the investment reflects TAG Aviation's commitment to serve its customers. The new hangar will be followed by construction of a 41,000-sq-ft ground-support facility, which will house aircraft handlers and equipment, as well as other teams of staff from among its 130 employees. (Additionally, part-time customer-service employees are employed at times of high demand.)

What sets the airport apart from competing London-area FBOs is its singular focus on business aviation, according to O'Reilly. "Farnborough is the only airport in Britain that has been specifically developed with business aviation in mind. Every other airport in the country is a hybrid, either a commercial airport with business aviation as a part of its operation, or a small aerodrome serving light aircraft and [with] flying lessons

taking place. We even have our own luxury hotel—The Aviator—on site."

Last year, TAG Farnborough Airport received approval to increase the number of aircraft movements from 28,000 to 50,000 a year by 2019. Within the total, the airport—on which TAG has acquired the freehold, having previously held a lease from the UK government—was simultaneously cleared to raise weekend movements from 5,000 to 8,900 in the same period. TAG increased the 2011 overall limit to 31,000, including 5,500 on weekends, and this year will permit 37,000 takeoffs and landings with 6,500 weekend movements. Some 60 aircraft—"all regular customers"—are based at Farnborough.

The number of corporate-aircraft flights in UK airspace during mid-year is expected to reach record levels because of businessmen coming to London for the 2012 Olympic and Paralympic Games, the Farnborough International airshow and/or Queen Elizabeth's diamond jubilee celebrations. Provision of arrival and departure slots at all airports in southeast England during the Olympic Games will be formally coordinated, and TAG Farnborough has been allocated up to 20 movements per hour during normal times of operation, according to O'Reilly. "We are well prepared to meet demand and will continue to offer our bespoke service. We have already received a high number of bookings." In fact, more than 700 Farnborough slots had been taken by late March.

Europe and the Middle East provide TAG Farnborough's most popular points of flight origin and destination, including Abu Dhabi, Bahrain, Dubai, Geneva, Nice and Moscow; New York is also high on the list.

The FBO offers a wide range of amenities and assistance for passengers, crew and aircraft, including concierge service, on-site office space and aircraft maintenance. As part of a



Hong Kong Business Aviation Centre

discreet and convenient "flight experience," passengers can be driven directly to waiting aircraft. TAG estimates that 65 percent of people flying to or from the airport never enter the terminal building.

TAG predicts that such convenience will be particularly important this year, as travelers head to London for special events. "Customers using TAG Farnborough Airport during the Olympic and Paralympic Games will require the quickest possible connection between their aircraft and transport to London," said O'Reilly. "This presents an opportunity for us to 'showcase' our service delivery."

Although TAG is dedicated to providing its high-flying international customers with "the best first impression and the best parting impression" of the UK, it has not forgotten those on the ground. It works closely with "our neighbors, business partners and the local community," according to O'Reilly. "Together with local residents, we have introduced a quiet-flying program, aimed at developing noise-reduction initiatives and encouraging operation of aircraft as quietly as possible." —I.G.

**8.3** Hong Kong Business Aviation Centre

Hong Kong has long been Southeast Asia's premier hub for private aviation. The industry is amply catered to by the Hong Kong Business Aviation Centre (HKBAC), which has become a hub for traffic in and out of mainland China. But capacity is a real challenge at Hong Kong International Airport (HKIA), colloquially known as Chek Lap Kok, and predictably it is business aviation that most feels the squeeze. This makes for a challenging environment in which to run an FBO, but HKBAC has risen to the challenge.

HKBAC has its own terminal and facilities separate from the

public terminal. There is a range of services for executive aircraft and passengers, including passenger lounge, private rooms and showers, business center facilities, ground handling, baggage handling, fueling, security, customs and flight planning. There are also designated aircraft parking spaces, and hangarage is available in two large hangars. There is a third under construction, due for completion later this year, which will be able to house six to eight aircraft.

A two-story ancillary building is adjacent to the hangars, providing a restricted airside office for aircraft operators. In addition pilot and crew lounges, shower rooms and resting facilities are also available.

Locally based Kadoorie Group has an equity stake in the privately owned terminal and its Metrojet subsidiary operates an on-site 24/7 maintenance facility. Metrojet is a certified repair station with approvals from both the Hong Kong Civil Aviation Department and the U.S. FAA, and is authorized to perform maintenance on aircraft registered in mainland

China as well as in other countries. Metrojet carries \$9 million of spare parts. It is a Gulfstream-authorized warranty line service facility and has approvals from Bombardier. Metrojet is also investing \$40 million in an MRO facility inside the Clark Airport Complex in the Philippines.

Signature Flight Support operates an on-site FBO within the HKBAC complex offering passenger and crew facilities, customs, fuel and concierge services, meeting rooms, Internet, flight planning, refreshments and a 23,800-sq-ft hangar, which can accommodate aircraft up to a Global Express or Gulfstream G500. Other international tenants include Jet Aviation Business Jets, which provides aircraft management, aircraft charter and flight support. However, Hong Kong has no space to take on maintenance of new based aircraft and even local groups have to be on a wait list and willing to pay a premium once capacity opens up.

Travel into town from the airport is easy. In addition to taxi services, HKIA is connected to the

city via the Hong Kong Express, a high-speed train that takes 28 minutes to travel to Hong Kong's Central district and business hub.

Meanwhile, in mainland China the Civil Aviation Administration of China's (CAAC) development of Tianjin Binhai Airport in the Dongli district near Beijing is due to have a major impact. Tianjin Airport Industrial Park lies to the northeast of the airfield, 69 miles from Beijing, to which it is connected with high-speed rail links. The park is a special economic zone catering to manufacturing. Hong Kong- and China-based aircraft management company BAAsia intends to create an FBO network across China starting in Tianjin.

Other Chinese airports offering some form of VIP services (albeit not always clearance for international flights) include Chengdu Shuangliu International Airport, Guangzhou Baiyun Airport, Sanya, Shenzhen Airport Feiyue VIP Club, Dalian Airport and Huangzhou Xiaoshan International Airport. —L.M.

**8.2** Harrods Aviation Luton

In a continuing effort to "serve our customer base as efficiently as possible," Luton-based Harrods Aviation recently invested in security equipment, fuel trucks and training. "Owning and managing our own fuel trucks enables us to guarantee a great price and on-time delivery without the need to wait for a third party," said Harrods, which has a second operation at Stansted, another airport north of London. The FBO has also upgraded its "VIP lounge" at Luton, to provide a comfortable, quiet place for customers to relax.

UK security requirements have driven the investment in, for example, explosives-detection equipment and associated staff training in its use and in baggage-search procedures. "Relying on a strong combination of in-house training and out-sourced support, [we] aim to comply with regulations while keeping any inconvenience to

Continues on next page >



Harrods Aviation Luton

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

FBO	Airport	Line Service	Passenger Amenities	Pilot Services	Facilities	Overall Average	
TAG Aviation	Farnborough	EGLF	8.7	8.8	8.6	9.0	8.8
Hong Kong Business Aviation Centre	Hong Kong International	VHHH	8.4	8.4	7.9	8.5	8.3
Harrods Aviation	London Luton	EGGW	8.1	8.6	7.9	8.2	8.2
TAG Aviation	Geneva	LSGG	8.0	8.3	8.1	8.2	8.2
Dassault Falcon Service	Paris Le Bourget International	LFPB	8.1	8.1	7.9	8.2	8.1
ExecuJet Switzerland/Aviation Ground Services	Zurich	LSZH	8.0	7.7	7.3	7.8	7.7
KLM Jet Center	Amsterdam Schiphol Airport	EHAM	8.0	7.6	7.7	7.7	7.7
Vienna Aircraft Handling	Vienna International Airport	LOWW	8.0	7.6	7.4	7.3	7.6
Jet Aviation	Geneva	LSGG	7.9	7.5	7.2	7.4	7.5
Signature Flight Support	Paris Le Bourget International	LFPB	7.7	7.5	7.2	7.6	7.5
Signature Flight Support	London Luton	EGGW	8.1	7.3	7.5	7.2	7.5
Abelag Aviation	Brussels National	EBBR	7.6	7.6	7.0	7.4	7.4
Jet Aviation	Zurich	LSZH	8.0	7.1	7.3	7.0	7.4
Service People	Hamburg	EDDH	7.8	6.9	7.6	7.3	7.4
Cannes Airport Handling	Cannes-Mandelieu	LFMD	6.9	7.6	6.8	7.5	7.2
Signature Flight Support/Aviaptner	Nice-Cote d'Azur	LFMN	7.0	7.4	6.8	7.1	7.1
Vipport FBO/Vnukovo	Moscow Vnukovo	UUWW	6.5	7.1	5.1	6.0	6.2

\*Note: FBOs with the same overall average are listed alphabetically. Shaded area indicates FBOs with an overall average of 8.0 or higher. Source: 2012 AIN FBO Survey

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TAG Aviation Geneva

Continued from preceding page customers, passengers or crew to a minimum," said Harrods.

Harrods Aviation provides its own ground-support equipment, including tow bars and toilet- and water-servicing vehicles, to avoid dependence on third parties and to ensure that the company's brand is "synonymous with quality service and attention to detail."

What characteristics of the FBO does Harrods think have the greatest appeal to business-aircraft operators voting in a survey? "Knowing your customer is key, and understanding the pressures and time constraints [on] both our pilot customers and their passengers helps us in ensuring we do all we can to help. When you match this with beautiful facilities at the right locations you have a winning formula."

Having seen a steady rise in traffic since the current recession began in 2008, Harrods is "quietly optimistic" that this trend will continue "as the value of business travel is recognized." During 2010-11 the FBO saw average traffic growth rates of 5 percent and reported an increase in typical aircraft size, and handled more intercontinental jets such as the Bombardier Global Express.

This move toward larger-cabin aircraft presents its own challenges, especially as the airport ramps and available parking areas are not growing (Harrods has 215,000 sq ft of ramp space and almost 60,000 sq ft of hangarage). The cloud's silver lining is that handling bigger aircraft boosts ground-handling fees, which Harrods calculates on physical size, rather than weight.

Apart from this development,

customer requirements have changed little since Harrods Aviation was formed in 1995 from Hunting Business Aviation—then trading as Metro Business Aviation. (The parent Harrods group was acquired in 2010 by Qatar Holding.) "Polite, knowledgeable and experienced customer service, maintenance provision and aircraft management are as valued now as they have ever been," said the FBO.

Harrods Aviation employs more than 240 people, for whom it provides a robust and thorough training program and "significant employee benefits." For example, many staff who might leave for personal or family reasons are retained as contract staff to help support operations during peak periods. "This will be of importance to us as we plan for the forthcoming [London 2012] Olympic [Games] period," which the FBO expects will provide "some unique challenges to our operation, but we are prepared. Our focus will be

to ensure we deliver a professional service to our customers." The retained, fully trained staff will be "a real asset to our business," concluded Harrods. —I.G.

**8.2 TAG Aviation Geneva**

If you are among regular users of TAG Aviation's FBO at Geneva International Airport in Switzerland, you likely will have arrived from (or be leaving for) UK capital London, or perhaps the French cities of Paris or Nice—the three most popular points of origin and destination for its customers, according to TAG Aviation Europe engineering and FBO services president Franck Madignier. In recent years, TAG has come to claim a 50-percent share of aircraft handling at Geneva, a development the FBO attributes to its attitude toward customers.

"Our greatest appeal is our levels of service and attention to detail. Our customers expect professional attitude, bespoke service

**AIN's 2012 FBO Survey by the Numbers**

Number of FBO evaluations provided by all respondents	<b>17,863</b>
Number of respondents who evaluated at least one FBO	<b>2,037</b>
Average number of FBOs evaluated per respondent	<b>8.8</b>
Number of FBOs evaluated by at least one respondent	<b>1,639</b>
Highest number of evaluations received by one FBO (Meridian, Teterboro)	<b>187</b>
Average number of evaluations received per FBO	<b>11.0</b>
Number of FBOs evaluated by only one respondent	<b>199</b>
Number of FBOs that received the requisite number of evaluations (30) to be included in the AIN FBOs of the Americas ratings tables	<b>115</b>
Number of FBOs that received the requisite number of evaluations (25) to be included in the AIN FBOs of Europe, Middle East, Asia and Africa ratings tables	<b>17</b>
Number of countries having FBOs that were evaluated	<b>94</b>

**FBOs Showing the Largest Increase in Overall Average from 2010 to 2012**

FBO	Airport		2012 Overall Average	2010 Overall Average	2010-2012 Change
Cannes Airport Handling	Cannes-Mandelieu	LFMD	7.2	6.4	0.8
Vipport FBO/Vnukovo	Moscow Vnukovo	UUWW	6.2	5.5	0.7
Signature Flight Support/Aviapartner	Nice-Cote d'Azur	LFMN	7.1	6.5	0.6
Dassault Falcon Service	Paris Le Bourget International	LFPB	8.1	7.6	0.5
Harrods Aviation	London Luton	EGGW	8.2	7.7	0.5
KLM Jet Center	Amsterdam Schiphol Airport	EHAM	7.7	7.3	0.4
TAG Aviation	Geneva	LSGG	8.2	7.7	0.4
Signature Flight Support	Paris Le Bourget International	LFPB	7.5	7.2	0.3

FBOs with the same change in overall average are listed alphabetically. Source: 2012 AIN FBO survey.

**FBO SURVEY RULES AND METHODOLOGY**

The 2012 FBO Survey report in the April edition of AIN covered FBOs in the Americas. This month's report of the survey covers FBOs in the Eastern Hemisphere: from Iceland to Australia and from Siberia to South Africa. Some 80 percent of the world's population of 7.1 billion lives on the four continents in this vast area.

According to GAMA, about half the 43,000 business jets and turboprops in the world are found in the U.S., with its population of just over 300 million. But the number of FBOs in the rest of the world is just a fraction of the 3,000 or so FBOs in the U.S. So it is not surprising that reader responses about FBOs in the Eastern Hemisphere still lag far behind responses about FBOs in the Americas; as a result, only 17 FBOs received the minimum number to be included in the ratings tables with this report. Nevertheless, as business aviation becomes more accepted throughout the world in the coming years, AIN is confident that more FBOs will qualify for inclusion in future reports.

As explained in the section, "FBO Survey Rules and Methodology," in last month's report, AIN has been asking readers about the service that fixed-base operators provide and publishing the results of these surveys since 1981.

Initially, we mailed paper survey questionnaires to our qualified subscribers in the U.S. (Qualified subscribers include pilots, corporate flight attendants, schedulers and dispatchers—in other words, people who use or make arrangements with FBOs.) In later years, we added qualified subscribers in the rest of North America and Europe.

In 2006 we decided to move the FBO survey online and engaged Forecast International of Newtown, Conn., to design the online survey questionnaire to AIN's specifications, administer the survey and tabulate the results. One unexpected benefit of offering the survey online was that survey respondents could add FBOs not already in the questionnaire, making these added FBOs immediately available for other respondents to evaluate. The following year this Web-based survey was expanded to include qualified subscribers throughout the world.

This year we decided to bring the entire survey process in house and build a completely new version of the survey website. This allowed us to make the online survey questionnaire easier to navigate, so respondents could fill it out more quickly and more easily add FBOs that were not yet in the survey database, while still maintaining the same rating categories and methodology. Having the survey in house also gave us easier access to the survey results and better control over how they are tabulated.

As in previous FBO surveys, we invited our qualified AIN subscribers to participate in this one. Each invitee received a code that he or she used to enter the survey website, as a way to prevent respondents from completing the survey questionnaire more than once. The website remained open from January 3 to midnight on February 3.

As it has done since 1981, the survey questionnaire asked readers to evaluate FBOs they had visited during the last year in four categories: line service; passenger amenities; pilot amenities; and facilities. The respondent does this by indicating his or her perception of the service and quality of each FBO by assigning a rating from one to 10 (one being the lowest and 10 being the highest) in each category. The respondent can rate each FBO only once, but there is no limit to the number of FBOs a respondent may rate.

To determine the category averages of an individual FBO evaluated, the survey website's computer separately adds the ratings in each of the four categories for that FBO and divides the sum obtained for each category by the total number of ratings received for each category.

An FBO's overall rating 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 received evaluations from 50 people (and assuming that all these 50 respondents gave that FBO a rating in each of the four categories), then the FBO would receive a total of 200 category ratings. These 200 category ratings are added together and then their sum is divided by 200 to get the overall rating for this FBO.

—R.R.P.

and a personal touch," said Madignier. "The satisfaction of our clients is not a detail, but the assemblage of many details."

Ever mindful that its competition is not far away, the FBO tries to adopt a five-star hotel approach, aspiring to do everything necessary to ensure that customers get the best, with everything done the right way. With such emphasis, TAG Geneva encourages its staff (which numbers 35) to study annual AIN FBO surveys, especially sections outlining customer-reported attributes of good and bad client service.

The FBO, which is located in the private C3 terminal, on Geneva's south apron, wants customers to feel that no better service is available—anywhere. To this end, TAG has recently improved its crew rest area, adding a bigger crew lounge, and has instituted a customer fuel project. The 2,150-sq-ft rest area is on the FBO's first floor, adjacent to two conference rooms. TAG has also remodeled its reception area to separate the passenger service facility from that for crews.

Two years ago, the FBO built a new 43,000-sq-ft hangar that also accommodates reception facilities for maintenance clients separated from the main FBO customer-handling section. (TAG is authorized to service Bombardier and Dassault business aircraft.)

The recession has been kind to TAG Geneva. "Traffic this year has begun at

much the same level as last year. Between 2008 and 2011, movements increased by roughly 2,000 a year. The number of passengers carried increased by 5,000 in the same period," said Madignier.

That good fortune has been offset by the popularity of the Swiss airport, which also serves airlines offering scheduled service to some 100 destinations. With business aircraft accounting for approximately 30 percent of 2011 traffic, capacity has become seriously constrained—meaning such operators can be required to obtain prior landing permission as well as a runway slot. With many commercial, sporting and cultural events in the city putting aircraft parking space at a premium, at the busiest periods aircraft may be limited to a single night's stay.

TAG has seen an increase in the average size of the aircraft handled in Geneva, with greater numbers of Gulfstreams and large Falcons appearing on the ramp, while charter operators, especially, have been using more light jets such as Embraer's Phenoms. Recently, TAG's charter sales business began to offer a Bombardier Global Express XRS.

TAG Aviation Handling usually works with about 50 jets at Geneva. Asked about resident business aircraft, Madignier said that the volume of traffic makes it difficult to distinguish those officially based there from those for which the airport is effectively their main base.

—I.G.

**8.1 Dassault Falcon Service Paris Le Bourget**

Dassault Falcon Service (DFS), one of eight FBOs at Paris Le Bourget Airport, is increasing its hangarage and parking capacity and improving the crew area. The FBO, a subsidiary of the manufacturer of

the Falcon business jets, believes that these changes, as well as its existing customer service, will inspire loyalty in its customers.

DFS hangars will soon be able to handle "about 10" aircraft, up from the current four, according to general manager Bertrand d'Yvoire. In addition to the

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**Other Frequented FBOs in the Eastern Hemisphere**

FBO	Airport	City
Airport Authorities	Samedan	Samedan
Biggin Hill Executive Aircraft Handling	London Biggin Hill	London
Eccelsa General Aviation	Costa Smeralda	Olbia
Gozen Air Services	Istanbul Ataturk	Istanbul
Hawker Pacific	Kingsford Smith	Sydney
Jet Aviation	Dubai International	Dubai
Jet Aviation	Dusseldorf	Dusseldorf
JetEx Flight Support (formerly Flying Group)	Paris Le Bourget International	Paris
Landmark Aviation	Nice-Cote d'Azur	Nice
Luxair	Luxembourg/Findel Airport	Luxembourg
Mallorcair	Palma de Mallorca	Palma de Mallorca
MJets	Bangkok International	Bangkok
Salzburg Airport Services	Vienna International Airport	Salzburg
Signature Flight Support	Munich	Munich
Sky Services	Milan Linate	Milan
Swissport Executive Aviation	Nice-Cote d'Azur	Nice
Universal Aviation	Le Bourget International	Paris

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

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## As Moscow market matures, FBOs look to other cities

by Vladimir Karnozov

Despite the significant growth of business aviation in Russia in recent years, true full-fledged FBOs still exist only in Moscow. As some other cities attract increased traffic, there are traces of the sort of ground handling services associated with FBOs, but these are still in an embryonic stage of development.

The Vnukovo-3 executive aviation complex at Moscow's Vnukovo Airport is the busiest of its type in the country. Construction of the facility was completed in 2007, and operating company VIP-Port recently enlarged the FBO's footprint to the point that

it can now accommodate up to 250 aircraft at once.

Vnukovo-3 consists of separate international and domestic terminals with direct access to a 27-aircraft apron and a 538,000-sq-ft hangar. The 75,000-sq-ft international terminal includes departures and arrivals areas on the ground floor, five meeting rooms, two bars and a duty-free store.

The upper floor houses offices, suites for aircraft operators, a conference room and a restaurant. There is a separate crew rest area with Internet access, flight-planning facilities and another bar.

The domestic terminal is just 5,400 sq ft. Maintenance, repair and overhaul (MRO) at the Vnukovo FBO is handled by the Jet Aviation group, and technical support is available from the Vnukovo Aircraft Repair Plant No. 411.

On the other side of Moscow, the business aviation center at Domodedovo International Airport is run under contract by Avcom-D. Its apron can accommodate 60 jets, and the complex features a VIP terminal, MRO shops and a hangar.

Avcom-D has obtained EASA Part 145 maintenance approval and holds other international certification to support Western-built aircraft.

Finally, at Moscow's main air-line gateway, Sheremetievo, a new Terminal A complex opened in March under the management of the Avia Group, which now

competes with the Premier Avia FBO opened several years ago.

Avia Group anticipates that the new FBO will be handling between 30 and 35 daily flights by this summer. Inside the FBO there are separate arrival and departure halls, two VIP lounges, a pair of meeting rooms, a conference room, offices with Internet access, a bar and a duty-free store.

Next to the terminal building is a 162,000-sq-ft hangar for aircraft storage and MRO services. Adjoining this is 248,000 sq ft of apron space.

Both Sheremetievo and Vnukovo airports are now slot-constrained and this is slowing down the rate of business aviation growth. With FBO infrastructure now relatively mature in the Moscow area, the local industry appears to be focusing on developments at other major Russian cities. For example, this

summer should see the conclusion of a new business aviation center at St. Petersburg's Pulkovo International Airport on a 1 million-sq-ft plot that will include apron space for up to 20 aircraft.

The new two-floor, 43,000-sq-ft VIP terminal has been designed to serve up to 1,500 passengers per day. The facility will be operated by JetPort, and its expansion plans include FBOs at the cities of Sochi, Krasnodar, Anapa and Genendzhik. □

Busiest Countries for Business Aviation (based on number of responses)*	
Country	Responses
United Kingdom	392
Canada	370
Brazil	333
France	302
Switzerland	208
Germany	200
Mexico	190
Italy	171
Australia	118
Spain	117
China	84
Austria	60
Russia	57
Netherlands	54
United Arab Emirates	48
Bahamas	44
Belgium	42
Turkey	37
Greece	35
Portugal	33
Argentina	32
U.S. Territories	32
Ireland	29
India	28
South Africa	27
Thailand	26
Saudi Arabia	24
Finland	22
Japan	20
Singapore	20
Sweden	20

\* Countries with same number of responses are listed alphabetically  
Source: AIN 2012 FBO survey

## First dedicated FBO opens in Nigeria

by Kirby J. Harrison

With the opening of Evergreen Apple Nigeria (EAN) last July, the west African country claimed to have its first purpose-built FBO, and business is ramping up as the 16,000-sq-ft facility attracts residents and

transients alike. The new EAN Hangar Jet Centre at Murtala Muhammed International Airport offers travelers a new level of security and a private alternative to the confusion of the old main terminal. (The FBO has no



connection with the U.S. company Evergreen International.)

Within the facility, the FBO offers two VIP lounges, a crew lounge and hotel-style short-stay accommodations with Internet access and satellite TV. Also available are amenities similar to those at any world-class FBO—flight planning, weather, flight permits, wireless Internet throughout the facility, immigration/customs clearances, crew transport, exclusive ramp parking and hangar aircraft storage. The Wings Restaurant, in the FBO complex penthouse, opened in April and will also provide business aircraft catering.

The main hangar has 23,680 sq ft of storage and the exclusive parking apron provides more than 75,000 sq ft. There is also a four-bay helicopter hangar.

According to EAN managing director and CEO Segun

Demuren, the location in the capital of Lagos is geographically central to much of the continent and is a natural refueling stop for flights between the southern tip of Africa and much of Western Europe. EAN Hangar Jet Centre recorded 478 aircraft movements from its opening in July 2011 through the end of the year.

### International Traffic

Demuren expects activity to grow, but without the peaks and valleys typical for FBOs located in tourism-centric regions of the world. "Most of the people who use our facility are business travelers, and we have found there is no real peak period [although] there is a lot of traffic during elections and national conferences."

In partnership with Maintenance Centre Malta (MCM), an EASA-certified provider with approvals from most of the major business jet manufacturers, the FBO offers maintenance support, pointed out Demuren.

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## Abu Dhabi reaps dividends of bizav

by Peter Shaw-Smith

Abu Dhabi's Al Bateen Executive Airport is fast gaining traction as the Middle East's only dedicated business aviation gateway. The redevelopment of the former military base is just part of a \$500 billion wave of investments being advanced in the largest of the United Arab Emirates.

"Al Bateen Executive Airport addresses the need for a high-quality business aviation facility in a prosperous city," general manager Steve Jones told AIN. "Eighteen months ago it still had a military feel. We set out our stall to develop a brand, fusing together a complete service."

The latest investment at the airport-owned DhabiJet FBO has been the opening of a dedicated two-floor crew lounge, immediately adjacent to the VIP terminal. Designed with a "European contemporary look," the new facility features a work area, conference rooms, showers, equipment storage, a prayer room and a rest area serving

drinks and snacks. Flight planning is available on site, with DhabiJet's managers based in the building to support clients. Looking ahead, the FBO plans to add a secure door directly onto the ramp so that crew can get airside without having to go through the VIP lounge.

DhabiJet's VIP terminal consists of a large majlis—the Arabic term literally meaning "a place for sitting" that commonly describes a comfortably furnished lounge. This can be divided into two areas, for example to accommodate groups of

travelers separated by gender.

Jones explained that the Al Bateen business model calls for it to become a hub of business aviation service. It is seeking to attract MRO providers, such as Jet Aviation and Air Works, with which it signed agreements last year. In its view there is scope for multiple FBOs. The inspiration is to match the service model long established at London-area bizav airports such as Farnborough and Biggin Hill.

Today Al Bateen is home to 10 based operators and has enjoyed annual traffic growth

rates of approximately 20 percent between 2009 and 2012. Based operator activity has increased by approximately 13 percent; itinerant traffic has swollen by as much as 52 percent.

Jones is delighted to be attracting more itinerant operations, some of them technical stops on long-haul flights from, for example, the UK to China. "They used to go into Dubai [UAE] or Doha [Qatar], but are coming in here increasingly," he explained. "No hassle, no waiting for a slot, 24/7 operations, a full ILS system, get their fuel, and away they go."

So how does Abu Dhabi stack up alongside its neighbor Dubai as a center for business aviation activity? Jones acknowledged

disquiet in the bizav community over mounting congestion at Dubai International Airport and delays in the planned relocation of traffic to the new Dubai World Central facility.

"Is this the start of a migration out of Dubai to here? I hope so," said Jones. "If we get [operators] here now, in the fastest growing city in the world...you can see the future here, and I think that's why they want to be here."

That said, Al Bateen is currently struggling to free up the space that business aircraft manufacturers and service providers seek there. "There is a tight boundary and innovative solutions are needed," acknowledged Jones. □

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Vector Aviation Vietnam

## Vietnam FBO Vector Aviation sees strong growth in traffic

Vector Aviation, the FBO at Ho Chi Minh's Tan Son Nhat Airport in Vietnam, recorded 1,500 aircraft movements in its first year (2011), according to customer relations manager

Nicolas Dang Vu, who told AIN that "activity is continuously growing." While the FBO incorporates traditional Vietnamese décor, the amenities are similar to those found in FBOs from

Paris to Los Angeles: ground handling, crew transfers, passenger and crew lounges, Wi-Fi connectivity, flight planning, fuel, weather, landing slots and permissions. Vector's staff can also arrange catering, hotel reservations, package tours, special security, visa service, translation and interpreter services, and car rental. —K.J.H.

## Nigeria FBO

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EAN Hangar Jet Centre has also applied to the Nigerian Civil Aviation Authority for a maintenance license to work on landing gear, brakes and batteries.

The Federal Airport Authority of Nigeria currently provides fuel through approved suppliers, and Demuren said the FBO is in talks with three international fuel providers and hopes to make a formal partnership announcement at the European Business Aviation Convention & Exhibition this month.

Some 31 staff are currently assigned to the FBO, and that number is expected to grow steadily. "There is no similar facility in Nigeria at the moment, so demand for our services is high," concluded Demuren. "Furthermore, there has been growth in the ownership and use of private jets in the country, which will ensure a long-term increase in business."

### More African Growth

Along with the recent opening of a new ground-handling base at Maputo International Airport in the capital of Mozambique by Tanzania-based provider Equity Aviation, the addition of EAN Hangar Jet Centre suggests growing recognition of the importance of business and private aviation and the need to support that industry segment.

Equity Aviation managing director Rosemary Kacungira told AIN that she has been pressuring Tanzania officials to move ahead with plans to build a new passenger terminal at Tanzania's Dar-es-Salaam International Airport. The new terminal would provide much improved support for business and private aircraft. Her company also provides handling on the island of Zanzibar and at Mwanza (near Lake Victoria), in addition to representation in Kenya, Uganda, Burundi and Rwanda. □



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## Shanghai Hawker Pacific is China's first real FBO

by Charles Alcock

Shanghai's Hongqiao Airport is leading the way in providing international-class ground service to business aircraft operators in China. The Shanghai Hawker Pacific Business Aviation Service Centre (SHP-BASC) remains, for the time being, the only purpose-built FBO in mainland China, representing a blueprint that general manager Carey Matthews believes will eventually be implemented at other airports.

The facility opened in April 2010, built and operated through a partnership between Australia-based maintenance and service group Hawker Pacific and the Shanghai Airport Authority. "The facility has been built to Chinese tastes and international standards," Matthews told AIN.

Unlike the business aviation enclave at Beijing Capital Airport, Hongqiao has a dedicated channel for customs, immigration and quarantine, allowing immediate processing of passengers and crew. Matthews believes that this approach will eventually be taken at Beijing airports too.

Initially, most flights to Shanghai continued to go to the main Pudong International Airport, some 40 miles outside the center of what is arguably mainland China's leading business city. In part this is because of the way Chinese air traffic controllers

automatically route most international traffic into Pudong unless the operator specifically requests to use Hongqiao with plenty of notice.

"Since then we have managed to attract far more of the traffic and Hongqiao now gets about 60 percent of all the business aviation traffic coming to Shanghai," explained Matthews. "About 40 percent [of all bizav movements] are handled by Shanghai Hawker Pacific and the numbers are now increasing fairly steadily."

Movements are increasing at approximately 14 percent month-on-month, with a total of 3,400 recorded last year and 4,000 expected this year. The majority of aircraft are large-cabin models.

Another strength at SHPBASC is that, for the time being, it is the only third-party, independent Part 145 maintenance facility for business aircraft in China, having won this approval from the CAAC in November 2011. In March, Dassault Falcon and Hawker Beechcraft confirmed its authorized service center status and it reached preliminary agreement to take the same step with Cessna. The facility is already cleared to work on Bombardier Globals registered in China.

Fuel supplies at Hongqiao—as at just about all Chinese airports—are controlled by the China National Aviation Fuel Company. SHP facilitates refueling, with both tankers and in-ground fueling available.

There are still fewer than 200 airports in the whole of China's vast land mass, and Shanghai is unique in having two international airports. Weather at Pudong, situated on the coast, forces aircraft to divert to Hongqiao, which has the added advantage of being the starting point for high-speed rail services.

"The Chinese authorities are now supportive of business aviation and they want to be able to manage this and airline traffic at both [Shanghai] airports," said Matthews. "We will see FBOs all across China because they bring real value to the economy."

A fifth runway is under construction at Pudong, and in February SHP started offering ground handling there. The airport authority has committed to building an FBO with VIP lounge there as well, and SHP's MRO license also extends to work done at Pudong.

Hawker Pacific is now looking at other locations itself, having started operations in China in 1984 with maintenance services in Beijing. "We were here before anyone else and you have to be patient and

careful, not biting off more than you can chew," he said.

Matthews's prognosis for the next 12 months is that the number of local operators and maintenance traffic will increase in Shanghai. "The industry is wrestling with how to get enough pilots to support the growth, but people are definitely getting a better appreciation of what a business jet can do for you," he concluded. □

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Shanghai Hawker Pacific

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**Top FBOs**

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existing four positions, DFS added capacity for another four in January. And parent company Dassault Aviation is building a showroom that will make two or three more positions available, for the new total of “about 10.”

Also, on ramp space next to

the former maintenance hangar “seven or eight additional parking positions” are now available for large business jets. The FBO has added new, bigger tractors to move the increasing number of heavy jets that frequent the FBO.

In addition, the company recently acquired ground starter units because, said d’Yvoire, “Local noise mitigation rules

limit the time you can use an aircraft’s auxiliary power unit.”

Inside the FBO, crews now benefit from a refurbished area, with Wi-Fi and dedicated computers.

DFS’s average activity is close to 6,000 movements per year. “Le Bourget’s traffic has decreased by 5 to 10 percent since late 2011 and we are following



Dassault Falcon Service Le Bourget

the same trend,” d’Yvoire noted.

Regardless of traffic volume, competition is fierce at Le Bourget. But coping with competition from more than a half dozen other FBOs is actually quite simple, according to d’Yvoire: give customers a reason to be loyal. DFS’s customers, he said, are used to a certain level of quality; they feel at home and are greeted warmly by people who know their expectations. “They are not ready to change for a newcomer,” he asserted. “We are not the most trendy or the cheapest FBO but our customers have good reasons to be loyal.” —T.D.

**OCEAN SKY TO BUILD NEW FBO**

UK-based business aviation services group Ocean Sky is about to start construction of a new FBO complex at London Luton Airport. The new building will replace Ocean Sky’s existing FBO and will be immediately adjacent to its main hangar and maintenance shops, with direct access to an enlarged ramp space with capacity for 30 aircraft at a time.

The entire redevelopment, to cost upwards of \$13 million, will not be fully completed before the end of August, but the additional ramp space will be available for use during this summer’s Olympic Games in London, for which Luton is expected to be a major gateway airport.

The new FBO terminal will include what Ocean Sky claims will be a “luxurious” passenger lounge, concierge services and on-site screening for customs and immigration procedures. Ocean Sky CEO Stephen Grimes said the new facility will allow the company—which is also active in aircraft management, maintenance and charter—to double the number of movements it handles at Luton within a year of its opening.

Ocean Sky also has FBOs at Manchester and Prestwick in the UK and Ibiza and Menorca, Spain. —C.A.