## Content

10 Years of Success .......................................................... 3  
Key Issues Affecting Business Aviation ............................ 12  
Reduced Activity Levels ..................................................... 13  
BusAv Committed to Minimising Impact on Environment .......................... 14  
EU-ETS Way Forward ................................................................. 16  
EASA Rulemaking – Where Are We? ................................. 17  
Flight Time Limitations (FTL) ............................................. 18  
Milestones for NPA OPS ....................................................... 19  
Security .......................................................................................... 20  
EU Airport Access ............................................................... 23  
Transatlantic Access ............................................................ 24  
SESAR .................................................................................................. 25  
  Objectives/Schedule ................................................................. 25  
  Benefits for Business Aviation ................................................ 26  
  Business Aviation Position ................................................. 28  
  Remaining Issues .................................................................... 29  
EBAA Leads on Promoting Safety ........................................... 30  
EBAA - A Success Story ....................................................... 31  
Advocacy ........................................................................................ 32  
State of the Association ........................................................... 33
10 Years of Success

Launched EBACE in 2001

“Demonstrating the value & dimensions of business aviation”

EBACE launches in 2001 with a specific business aviation focus.
As the pre-eminent event in Europe dedicated solely to business aviation, EBACE showcased for the first time, to policymakers and the public, the industry’s value in supporting jobs, boosting productivity, efficiency and competitiveness for businesses, and enhancing transportation access for communities across the European region.
10 Years of Success

Became one of the fastest growing aviation sectors in Europe

“2nd only, in terms of growth, to the low cost carriers”

Business aviation enjoys steady growth across Europe.
In the first decade of the new millennium, companies of all sizes have turned increasingly to business aviation to meet their transportation challenges, making the industry one of the fastest-growing aviation sectors in Europe after the low cost airlines. Today, business aviation represents some 7% of IFR traffic in Europe, and the fleet is cleaner, quieter and more fuel-efficient than at any time in its history.
10 Years of Success

Generated political interest in business aviation

“Eurocontrol reports that BusAv is 7% of IFR traffic in Europe”

Key European policy leaders recognize business aviation’s value.
The work done by EBAA has helped inform senior figures from European governmental institutions about the value of business aviation to citizens, companies and communities in the region.

For example:

- Eurocontrol officials have focused on the industry in a series of studies, including:  
  * Getting to the Point – Business Aviation in Europe (2006),
  * More to the Point - Business Aviation in Europe (2008), and

- European Commission officials published a 2008 Communication entitled An agenda for Sustainable future in General and Business Aviation, recognizing the sector’s important role in providing “…tailored, flexible, door to door transportation for individuals, enterprises and local communities, increasing the mobility of people, productivity of business and regional cohesion.”

- The European Parliament and Council of the EU have increasingly factored business aviation into their policy planning. As just one example, both institutions now consider the industry’s unique operating needs in airport and airspace capacity planning, which will ensure that aviation infrastructure investments will reflect the needs of all aviation system users.
10 Years of Success

EU Parliament & Council delivered resolutions on business & general aviation

“Recognising our needs must be considered for airport & airspace planning”

The EU Parliament and Council each publish resolutions on Business and General Aviation. These resolutions recognize, for the first time, that the needs of general and business aviation had to be taken into account in airport and airspace capacity planning to ensure that it reflects the needs of all airport and airspace users.
10 Years of Success

Opened new dialogue between EU and US officials

“Facilitated by the US/European partnership in EBACE”

New dialogue opens up between US and EU officials to improve access by EU operators to the US. This closer linkage between the US and Europe has been facilitated by the US/European partnership in EBACE, which has always been a prime venue for industry and government to share perspectives about meeting future air travel demands.
10 Years of Success

Assisted in development of a new European framework for BusAv security

“Reducing unnecessary and burdensome rules designed for airlines”

A new European framework for business aviation security is developed. Supported by the industry, European safety rules tailored to the needs of the business aviation sector have been created, increasing security and reducing unnecessary and inappropriately burdensome rules designed for the airline sector.
10 Years of Success

Increased EBAA membership

“Enhancing our value & increasing funding for important studies”

**EBAA membership increases.**
The representative base of the European Business Aviation Association has enlarged. As a result, the Association is more effectively able to represent the industry, and EBAA members in turn have more resources with which to communicate the value, diversity and priorities of the region’s business aviation community.
10 Years of Success

Commissioned the PWC report on the *Economic Impact of Business Aviation in Europe*

EBAA publishes an important and timely study quantifying business aviation’s powerful benefits. To measure the role of business aviation in promoting jobs, investment and economic activity, EBAA commissioned a key study from the respected firm of PriceWaterhouseCoopers, which documented the close relationship between business aviation and economic growth. PWC’s powerful and well-received 2009 report highlighted that business aviation contributed:

- €19.7 billion in annual gross value added to the European economy in 2007;
- 0.2% of combined GDP (of the EU, Norway and Switzerland);
- 164,000 jobs, and;
- Combined annual wages and salaries of €5.7 billion

“€19.7 bn in annual gross value to European economy & producing 164k jobs”
10 Years of Success

Revived the “Airports, Handling and Ground Operations Committee” (AHGOC)

The AHGOC’s mission is to:

- support the sustainable growth of the business aviation industry and the interests of Association members by promoting fair, equitable and secure access to airports;
- assure safety and standards of best practices at airports and in handling companies;
- promote environmentally friendly operations to the benefit of local communities; and
- fight for fair competition to the benefit of all stakeholders to meet the needs of aircraft operators, their passengers and crews.

Michel de Ronne of Aéroport de Paris serves as the first Chairman of the Committee, and within the AHGOC there are two Working Groups: One for Airports and one for Handling. While these Groups focus on specific objectives related to their unique interests, they also work together on common issues.
Key Issues Affecting Business Aviation

- Effects of Economic Downturn on our Sector
- EU-ETS
- EASA Rulemaking (including FTL)
- Security
- Airspace and Airport Access and impact of the Single European Sky
- Transatlantic Access to US
- Safety Challenges and Development of Industry Best Practices
- Member Benefits
- EBACE
- Advocacy

“Ever More Important Role For EBAA In a Fast Changing Operational & Regulatory Environment”
Reduced Activity Levels

- European-wide activity levels and aircraft prices have stabilized
  - 2009 outturn better than expected at -15%
  - 2010 expected to show slow growth
  - Charter has been the worst affected
- Aircraft however are trading at realistic prices

“Slow but slightly erratic recovery anticipated”

European BusAv Traffic Activity

BusAv IFR Arrivals & Departures
BusAv Committed to Minimising Impact on Environment

Business aviation charts a course for continued emissions reductions. Business aviation has improved fuel efficiency by 40% over the past 40 years. Looking ahead, our commitments parallel those of the airline sector, with set targets that include carbon-neutral growth by 2020, improved fuel efficiency by an average of 2 percent per year until 2020, and reduced carbon emissions by 50 percent by 2050 relative to 2005. The business aviation community has also expressed its commitment to participating in market-based measures such as the EU Emissions Trading Scheme,

but...
The EU-ETS as it stands now is a mess!

The current rule states that if using aircraft above 5,700 kg, all commercial operators emitting more than 10,000 tonnes CO$_2$ per year (or operating more than 243 flights per 4 months) and all non-commercial operators will be required to participate in ETS, reporting their carbon output and buying offsets for most of their CO$_2$ emissions.

However, with no small emitter threshold for non-commercial operators, the system is disproportionate and unworkable.

Furthermore, “the List” published in February - like all previous ones - is full of inconsistencies and errors.

- Using the example of the UK, of 894 listed operators, 341 (38%) remain unaccounted for and potentially not compliant with this mandatory element of the ETS scheme.
- Yet this 38% account for less than 1% of the UK’s aviation emissions!

The EBAA continues to advocate tirelessly on behalf of business aviation with regards to the EU Emissions Trading Scheme, to ensure that rules are transparent, cost-effective and proportionate.
EU-ETS Way Forward

To help resolve the current problems, the EBAA is committed to 4 objectives:

1. Having the threshold raised for reporting requirements under the MRG for small emitters from 10,000 tonnes to 500,000 tonnes
2. Having Eurocontrol’s ETS Support Facility calculations accepted without additional verification for operators who agree to use the ETS Support Facility
3. Improving access to emissions credit auctions for small emitters
4. Having the threshold standardized at 10,000 tonnes for the inclusion of all operators of aircraft >5700kgs (both commercial and noncommercial) in EU ETS
EASA Rulemaking – Where Are We?

- 14,000 comments on NPA now being analysed
- EBAA has experts in all the key review groups (SMS, FTL, Commercial and Non-commercial Review Groups)

“But we shall need your help in ensuring our comments reflect the views of all stakeholders. Please be ready to help our specialists”
Flight Time Limitations (FTL)

Until now, business aviation has been inadequately covered by EU-OPS Subpart-Q for Flight Time Limitation (FTL). As EASA prepares to amend these rules, EBAA has launched an important Fatigue Factors Survey and will use the input of pilots to propose a new set of tailored rules to be included in the revision.

The survey is being conducted in collaboration with Dr. Mark Rosekind, PhD, of Alertness Solutions USA. Dr. Rosekind leads an innovative scientific consulting firm recognized for translating complex sleep and circadian (body clock) science into effective strategies that enhance performance, safety and health. The survey feedback permits EBAA to, for the first time ever, identify and map fatigue factors in business aviation operations in Europe based on actual experiences. So far we have received up to 560 completed responses, with respondents from 21 different countries.
Milestones for NPA OPS

02/2010 • Comments analysed

04/2010 • First draft of revised rules available

06/2010 • Consultation Review groups finalised

10/2010 • Publication CRD OPS

03/2011 • Opinion, Draft Decision on OPS rules

04/2012 • Adoption of Cover Regulation OPS
• Decision on AMC/CS/GM
Security

According to the regulation, Member States may derogate from the common basic standards referred to in Article 4(1) of Regulation (EC) No 300/2008 and adopt alternative security measures that provide an adequate level of protection on the basis of a local risk assessment at airports or demarcated areas of airports where traffic is limited to one or more of the following categories:

1. aircraft with a maximum take-off weight of less than 15 000 kilograms;
2. helicopters;
3. law enforcement flights;
4. fire suppression flights;
5. flights for medical services, emergency or rescue services;
6. research and development flights;
7. flights for aerial work;
8. humanitarian aid flights;
9. flights operated by air carriers, aircraft manufacturers or maintenance companies, transporting neither passengers and baggage, nor cargo and mail;
10. flights with aircraft with a maximum take-off weight of less than 45 500 kilograms for the carriage of own staff and non fare-paying passengers or goods as an aid to the conduct of company business.
Security

Airport & Demarcated Areas


“Airports” where only derogated flights operate = Alternative Security Measures.

“Airports” where non-derogated flights operate = Common Basic Standards.

“Demarcated Area” for derogated flights only = Alternative Security Measures.

Derogated Flight: No “Airport” Required.

Derogated Flight: “Airport” Required.

Non-Derogated Flight: “Airport” Required.
Security

Code of Best Practice on Security Rules for “Small” Aircraft & Airports

“Please lobby your National Authorities to authorise the use these self-policed rules as an AMC under the EC derogation”

The EBAA has drafted a Code of Best Practice on Security Rules for “Small” Aircraft and Airports for Member State approval. We encourage you to lobby your National Authorities to authorise the use these self-policed rules as an AMC for our sector under the EC derogation.
EU Airport Access

Protecting historical usage of airport capacity + a method to manage slots by non-scheduled operators

EBAA is a member of the Commission-created Airport Observatory. Furthermore, the Association has developed a policy paper proposing both a procedure allowing operators to protect historical usage of airport capacity and a method to manage slots by non-scheduled operators. The EBAA is also working with the European Commission to have our issue recognized in the on-going process to revise the Slot Regulation.
The EBAA continues to hold meetings with the US TSA, Department of Transport (DoT), Customs & Border Protection and FAA to apply pressure in order to secure better procedures for European operators.

The US TSA has promised that it will eliminate the waiver process both for commercial and non-commercial operations. All security procedures will eventually be done via the Advanced Passenger Information System (APIS). In the meantime they have committed to reducing the delays for the waiver procedure.
Objectives

- To triple the traffic
- To reduce route charges by 50%
- To improve safety by a factor 10
- To reduce emissions by 10%

Schedule

“The best way to predict the future is to create it”
(Peter Drucker)
Benefits for Business Aviation

In Terms Of Safety

- With ADS-B TMA of local airports are becoming “controllable”
  - ASAS Self separation, Virtual Tower, Dynamic airspace allocation
- In low density airspace (above FL410, “desert” areas)
  - Developments of “cooperative self separation”
- Elimination of non precision approaches (LPV SBAS on any runway)

In Terms Of Environment

- Cruise climb
- Real CDA (in SBAS mode)
- Development of special procedures to mitigate noise nuisance

In Terms Of Operations

- Complete flight plan optimization (Business Trajectory)
- “Free flight” in “climbing cruise” all over Europe
- “3D pseudo ILS” down to 200 ft on any runway
  - Possibility to operate in CAT2/3 conditions for EVS aircraft equipped
Benefits for Business Aviation

Safety First

• Elimination of non-precision approaches
• Non controlled airspace to become controllable

Minimize Impact On Airline Traffic

• Operate above Airliners (above 41000 ft)
• Develop “Wake vortex free” to maintain runway throughput
Business Aviation Position

To Operate In Harmony With Light Aviation

- By promoting an ADS-B adapted to GA (UAT)

To Mitigate Noise Nuisance To Airport Residents

- Special procedures (steep & curved approaches)
Remaining Issues

LPV Deployment

• SBAS (EGNOS) is now accepted. LPVs have now to be designed and deployed by ANSPs

SESAR & Small Airports

• Need to select an ADS-B adapted to GA (UAT in the US)
  - (ADS-B out, in, traffic info, weather graphic maps)
• No Controlled airspace to become controllable
  - (Traffic tactical situation, Self Separation, Virtual tower, Dynamic airspace allocation)
• R&D Activities to develop “reporting devices” for Ultra light machine
  - (low weight , low cost, battery powered, consumer technologies)
• Access to SWIM (WIMAX WIFI)

EBAA is a member of the SESAR Joint Undertaking Board (SJU), which is responsible for managing the European ATM project. The SESAR programme has already had a tangible impact on operators: data link with VDL 2, RNP navigation, EGNOS equipage project, ADS-B.

Furthermore, EBAA/ Dassault and NetJets (The EBAA consortium) have signed a funded contract with the SJU, contributing technically to the research project and ensuring business aviation interests and operational needs are properly taken into account.
EBAA Leads on Promoting Safety

Business Aviation has a good safety record but the best practices of the Corporate Sector need to be rolled out across all elements. IS-BAO has proven to be a very effective tool for delivering safety improvements.

The small operator Safety Management System (SMS) developed in 2000 and 2001 has also proven effective over a decade. Additionally, it is available as a stand-alone module for ALL operators. An IS-BAO version for helicopters is now under development to bring fixed-wing best practices to a sector of BusAv where there is considerable scope for improvement.

As of November 2010, SMS will be mandated by ICAO. And an Emergency Response Plan is an essential part of an SMS. To that end, the EBAA is now offering all Europe-based business aircraft operators comprehensive guidance material on Emergency Response Planning. Produced in the form of a digital Emergency Response Planning Guidance Manual on CD-Rom, it is available to order via the EBAA website www.ebaa.org.

Additionally, the IS-BAO toolkit, training and auditing support is available at cost price to members through EBAA. Over 900 copies have been sold globally, with over 200 operators registered. It is now an official European Standard (CEN)

Registered non-commercial operators are already being accepted by Bermuda and Cayman as meeting their standards without further audit. And EASA will do the same post 2012.
EBACE - A Success Story

Even in a year as tough as last, almost 11,000 attendees walked the halls of EBACE 2009. This year looks promising as well with exhibitor bookings within 3% of last year and equivalent income and hotel bookings up 10%.

“EBACE continues to be a growth engine for business aviation in Europe - even in tough times - and is a key contributor to our growing membership base and revenue streams”
Advocacy

EBAA also maintains a strong profile within Europe, thanks to high-level contacts with key people at key meetings, and with the support of the Board, frequent contact with important MEPs and Officials. In 2009, it was fortuitous that we were able to provide relevant and timely statistics (via the PriceWaterhouseCoopers Study and the Eurocontrol Study on BusAv), which demonstrated the reach and importance of business aviation. We continue to secure good press column inches and are often sought after to provide keynote speakers for various conferences in Europe and beyond.
State of the Association

By the end of 2009, EBAA registered 369 members, representing a 4% decrease on 2008 in numbers, but an increase of 10% in revenues. The Association’s strong financial position, excellent staffing and prudent spending allow it to face the future with optimism despite the difficult times and lower revenues from EBACE in 2009.

Membership by the End of 2009
EBAA is in excellent shape with strong funding to meet the challenges we face on behalf of our Members.

Expenditure as recommended in the 2010 budget is necessary to allow the Association to continue to meet your expectations and deliver its goals.

Thank You for Your Confidence!
The European Business Aviation Association (EBAA) promotes excellence and professionalism amongst its members to enable them to deliver best-in-class safety and operational efficiency.

A founding member of the International Business Aviation Council (IBAC), through which members’ interests are represented at the International Civil Aviation Authority (ICAO), the EBAA ensures global recognition of business aviation as a vital part of the Air Transportation infrastructure. The Association confers with different international and European bodies in order to achieve a level playing field for all operators within the business aviation industry.

The EBAA has been representing the legitimate concerns of the business aviation industry since 1977 and has nearly 400 members.

European Business Aviation Association
Avenue de Tervuren 13a/Box 5
BE-1040 Brussels, Belgium
Tel: +32 2 766 00 70
E-mail: info@ebaa.org
www.ebaa.org