

A Roadmap for European Business Aviation



DISCOVER
INSIDE

WHY DOES EUROPE
NEED **BUSINESS
AVIATION?**

THREE PRIORITIES TO
ENABLE EUROPEAN
COMPETITIVENESS
AND REGIONAL COHESION

BUSINESS AVIATION
AND **THE ENVIRONMENT**



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A Roadmap

A ROADMAP FOR EUROPEAN BUSINESS AVIATION

EXECUTIVE SUMMARY

By the end of 2019, over 1 million passengers will have boarded a business aircraft in Europe, and many factors will have driven this demand, from business and medical, to governmental needs for point-to-point transportation. While this translates into tremendous economic opportunities for European business aviation, it also highlights the challenge of growing in a sustainable, safe, and secure manner within increasingly congested infrastructures, airports, and airspace.

Why does business aviation matter? It adds almost **€90 billion** to the European economy, **employs 375,000 people**, provides **more than 100,000 unique routes within Europe** (3 times more than airlines), and represents **8% of European traffic**. As one of the most innovative sectors of the aviation industry, it supports local communities through its contribution to sustainable development goals, whether via our Business Aviation Commitment to Climate Change or through helping to save lives by operating around **70 medical flights a day**.

Business aviation can contribute even more significantly to local communities and economies because we fly where others cannot. As such, we need to guarantee that the European Aviation

Framework is inclusive, taking the specific needs and challenges of our sector into account.

But business aviation is not just a time machine. New technologies such as electrification, VTOL (Vertical Take-Off and Landing), blockchain, artificial intelligence, and alternative fuels are igniting the pace of innovation in aviation. And it is nowhere more prevalent than business aviation: the industry that sets the bar for air travel.

This roadmap provides vital information on several priorities for our sector at the European, and sometimes global level. This includes the environment, safety, access to airports and airspace, and more. Each section outlines concrete actions to advance our shared objectives of

building a sustainable, efficient, inclusive, and prosperous European Aviation Framework. This document is intended to serve as a starting point for policy development, to be updated as European business aviation priorities evolve along with the political agenda and economic landscape.

EBAA will make sure the European business aviation sector is driving the right changes to the benefit of all Europeans: its citizens, business aviation users, and the passionate professionals who make up our industry.

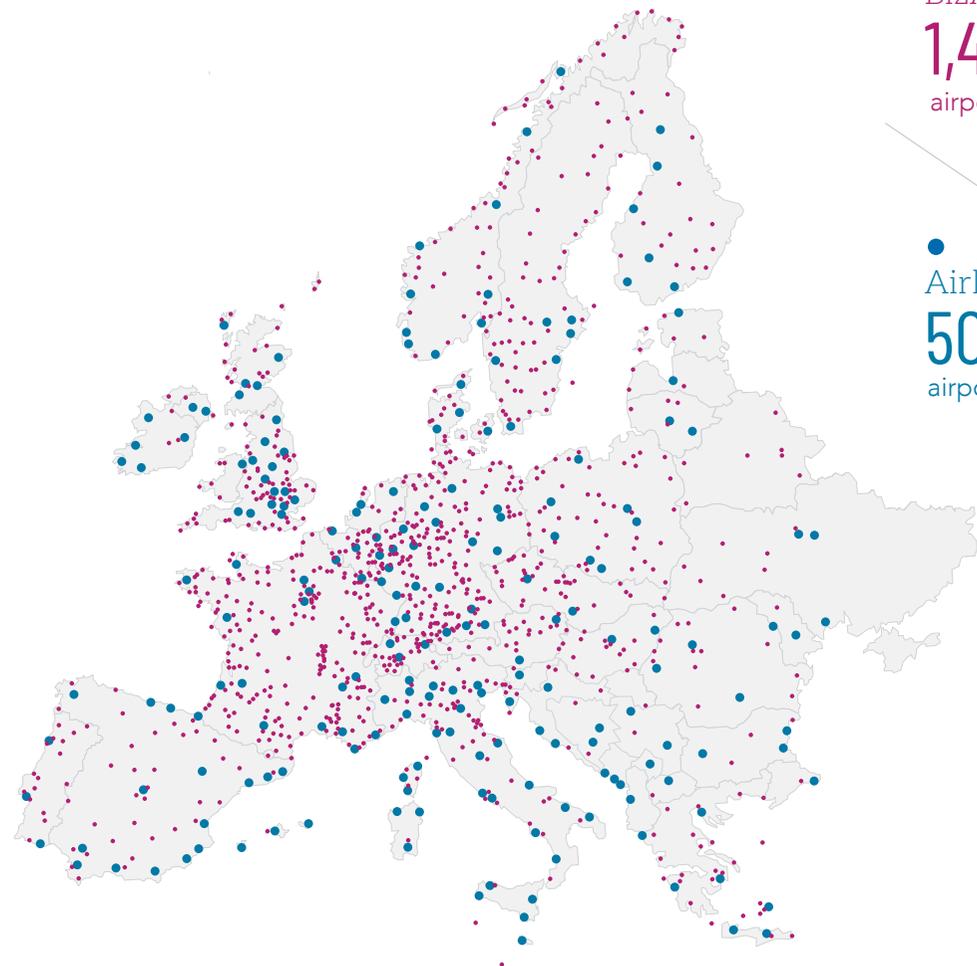
What is business aviation?

WE FLY WHERE OTHERS DON'T

Business aviation is a specialised travel solution and investment strategy, enabling people to meet face-to-face when time matters most. It allows users to have full control over their schedule and travel to at least **3x more destinations in Europe than commercial airlines.**



This drives **productivity gains** and is a true example of **"smart mobility"**, connecting communities in remote places and **boosting their economic growth.**



● BizAv
1,400
airports

● Airlines
500
airports

THE EUROPEAN BUSINESS AVIATION SECTOR

A symbol of European excellence, business aviation is a dynamic sector which fosters technical innovation and environmental stewardship across the full value chain, from manufacturers to operators. It provides highly skilled jobs and increases economic growth within both the industry and the local communities around the airports.



Why does Europe need business aviation?



EUROPEAN COMPETITIVENESS

Business aviation is a leading contributor to the European job market, securing nearly half a million highly skilled, highly paid jobs and accounting for almost 87 billion Euros of added value to European GDP.

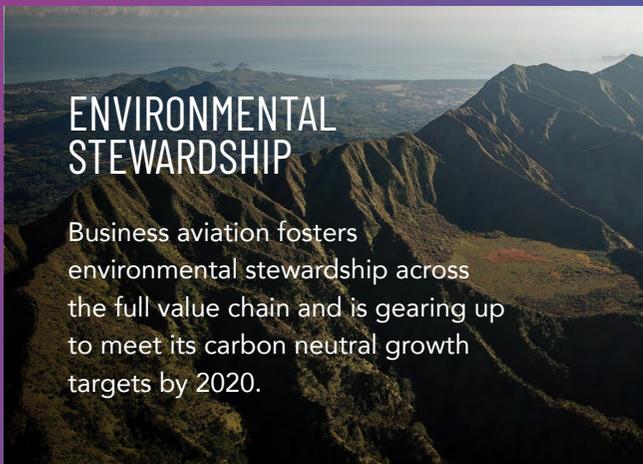


PRODUCTIVITY GAINS

Business aviation enables more efficient and productive face-to-face interactions – be they for business, government relations, medical emergencies or humanitarian crises - when time matters the most.

ENVIRONMENTAL STEWARDSHIP

Business aviation fosters environmental stewardship across the full value chain and is gearing up to meet its carbon neutral growth targets by 2020.

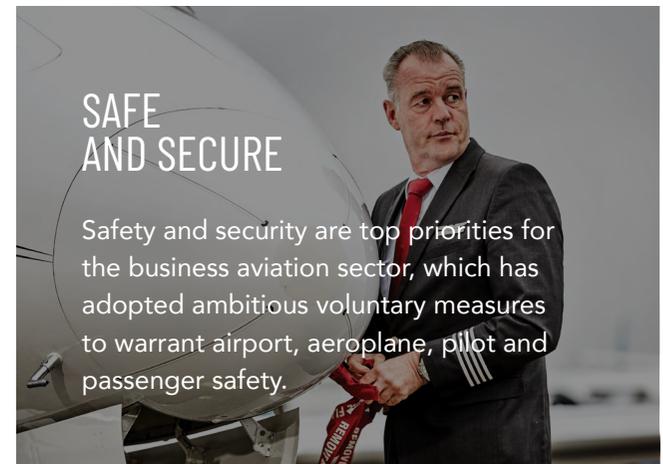


SMART MOBILITY

Business aviation seamlessly connects distant and remote regions, stimulating investment, as well as business and community growth.

SAFE AND SECURE

Safety and security are top priorities for the business aviation sector, which has adopted ambitious voluntary measures to warrant airport, aeroplane, pilot and passenger safety.



FACTS & FIGURES ABOUT EUROPEAN BUSINESS AVIATION

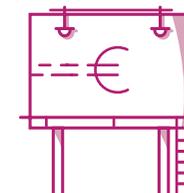


8%
of European traffic



374,000
direct and indirect jobs

€ 87 BILLION
economic output



+120,000
unique European city pairs a year
thanks to Business aviation



1,400
European airports connected
(of which 900 connected by business aviation only)

2,000
flights every day,
of which 90% within Europe



3,700 AIRCRAFT
based in Europe



127 MINUTES
Average time saved per trip

70 MEDICAL FLIGHTS
per day



CLIMATE CHANGE
COMMITMENT:

-50%
reduction in total CO₂
emissions by 2050
relative to 2005

2%
improvement in fuel
efficiency per year between
2010 and 2020

**CARBON
NEUTRAL**
growth by 2020

Three priorities to improve connectivity, efficiency, and European competitiveness across the continent and beyond.

To continue our economic and smart mobility contributions to businesses and citizens in Europe, and to respond to the expectations of future generations, Business Aviation needs:



PROMOTION OF CONTINUOUS IMPROVEMENTS ON SUSTAINABILITY AND REDUCING OUR ENVIRONMENTAL IMPACT

EBAA supports our members in getting ready for CORSIA and actively promotes our sector's carbon neutral growth targets by 2020. EBAA also promotes the development and adoption of Sustainable Aviation Fuel (SAF) and introduced the "Business Aviation Guide to the Use of Sustainable Aviation Fuel (SAF)," focused on raising awareness and adoption of available and sustainable aviation fuel options.



Implementing sustainable improvements in business aviation will further support the UN's 17 Sustainable Development Goals.

2

IMPROVED ACCESS TO AIRPORTS AND AIRSPACE



Airline traffic is ever-increasing, and business aviation is the last in a long queue. The estimated doubling of overall air travel by 2035 will lead to further capacity constraints, which need to be addressed **now**.

3

FAIR AND PROPORTIONATE REGULATION



One size does not fit all. Due to the unscheduled nature of business aviation, size of aircraft, and type of commercial enterprises behind the activity - many EBAA members are SMEs and family-owned businesses - our operations and our operators have their own specificities and safety concerns that need to be taken into consideration by legislators.

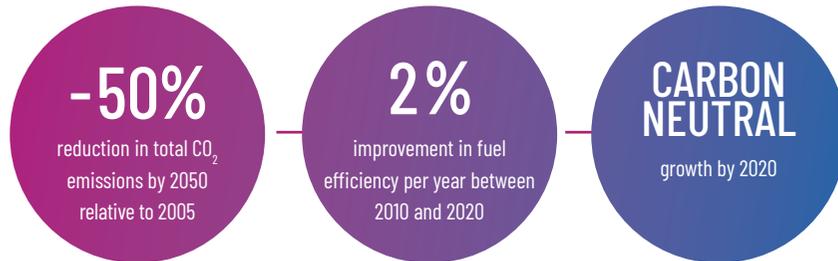
CHAPTER 4

Environment

We encourage environmental stewardship across the full value-chain and are gearing up to meet the industry's carbon neutral growth targets by 2020.

The Business Aviation Commitment on Climate Change was published in 2009, supported by the entire industry. This commitment is the foundation for everything we do towards reducing our impact on the climate and the environment. It sets aspirational goals and a pathway to achieving those goals through various milestones, until 2050.

OUR GOALS ARE



PATHWAYS

Investment in new aircraft technology that includes **Sustainable Alternative Fuel (SAF)**

Building and using **efficient infrastructure**

Relying on **effective global market-based measures**

More efficient flight operations





CORSIA

The Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) is a **milestone mechanism** within international aviation for reducing the climate impact of the industry and supports the goal of carbon-neutral growth.



What is important to our sector?

- Alignment of rules and exemptions in market-based measure schemes - CORSIA and the EU ETS.
- Having one global market-based carbon reduction scheme to assist operators.

- Any market-based mechanism supports and incentivises the use of sustainable aviation fuel.
- Fair and equitable treatment of business aviation within market-based measures and carbon reduction schemes.





NOISE

Noise continues to be an area where aircraft manufacturers invest considerable time towards reducing aircraft-related noise.

What is important to our sector?

- Continue to improve the mechanisms within the “balanced approach” measures basket in order to minimise local noise at airports.
- Continued support through research funding to reduce aircraft and airframe noise.
- Continued support for noise-reducing operational procedures like Constant Descent Approaches (CDA) and continuous climb departure (CCD).
- Noise improvements should not lead to a trade-off that would increase overall CO₂ emissions.



We also call for fair treatment, data driven standards development and avoid unilateral rulemaking for (supersonic) noise and emissions.



SUSTAINABLE AVIATION FUEL (SAF)

Business aviation’s activity for SAF took a significant step forward with the publication of the [SAF Guide](#) and associated demonstration events. SAF is, for our sector, the biggest opportunity to achieve its climate goals.

What support does our sector need to improve the uptake of SAF?

- Policy mechanisms towards enabling and supporting the development of local infrastructure to produce the fuels required by the industry.
- Continuity between the European Union’s RED II and CORSIA in terms of carbon accounting rules and mechanisms.
- Clarity on sustainability requirements for the feedstock, production and use of SAF.
- Support on making the SAF market investable and permitting long-term purchase agreements to stabilise and finance fuel.
- Further pathways for feedstock development and subsequent certification of those pathways.





TAXES

Taxes levied specifically on aviation fuel would harm business aviation's socio-economic contribution, impede connectivity and are an ineffective way to pursue environmental goals.

Numerous EU-wide taxes already affect business aviation. On top of those existing taxes, European Member States impose taxes at national levels, such as the British Air Passenger Duty (APD) or Italy's luxury tax.

What is important to our sector?

We urge European and national policy makers to focus on concrete actions that support the growth of our sector, and our members' sustainability efforts, such as:

- concrete support (i.e., tax incentives) in the delivery of SAF;
- funding and development capability for future hybrid and electric aircraft systems;
- the full implementation of the SES that would allow our operators to reduce their fuel consumption by 5 to 10%, as well as related CO₂ emissions;
- data driven standards development and avoid unilateral.



CHAPTER 5

Safety

Safety comes first in aviation. EBAA promotes the use of best practices and compliance, using industry standards. We also support individual approaches to reduce risk and implement initiatives to improve safety.

Aviation regulation provides a baseline for aviation safety and needs to remain proportionate to achieve the desired outcome. Regulation covering commercial operations is mainly tailored around scheduled traffic operating large fleets of similar aircraft types from a hub to normally well-equipped airports and back. From a regulatory and safety perspective, this creates undesired side effects: overcomplications could potentially affect safety for smaller operators providing on-demand operations to and from secondary airports with irregular intervals, and small multi-aircraft fleets.

FTL REQUIREMENTS FOR AIR TAXI AND SINGLE-PILOT OPERATIONS

Business aviation's on-demand, unscheduled operations are subject to an FTL rule defined in accordance to scheduled airline operations constraints.



Business aviation calls for a full set of FTL rules defined in accordance with the sector's realities and specificities to avoid fatigue-inducing rostering or unwarranted restrictions of on-crew duty caused by the differences between scheduled and on-demand traffic patterns.



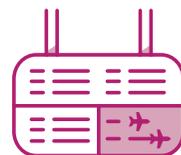
RECOGNITION OF INDUSTRY STANDARDS

The business aviation community's commitment to keeping a continued focus on safety takes many forms. These include the implementation of the two IBAC standards:

- International Standard for Business Aircraft Operations (IS-BAO)
- International Standard for Business aviation Handlers (IS-BAH)

Both are a framework for making safety a part of the entire flight operations culture. They are business aviation industry codes-of-practice recognized for meeting the ICAO Safety Management System (SMS) requirements. IS-BAO is also recognized by CEN, the European Committee for Standardization as an industry standard for business aircraft operations.

Nevertheless, the business aviation community still has work to do, in partnership with EASA, for both standards to become the accepted default standard for business aviation safety compliance in Europe. All efforts so far have been greatly appreciated, but attaining this goal remains of utmost importance.



DEFINITION OF BUSINESS AVIATION IN THE CONTEXT OF THE EASA BASIC REGULATION

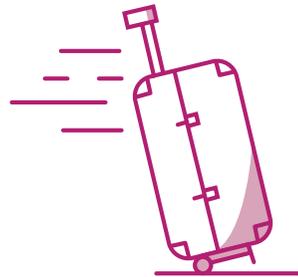
Regulations covering commercial operations are mostly written for scheduled airline operations. Most commercial, on-demand business aviation operates under the same regulation as scheduled airline traffic, large fleets of similar aircraft types, and operations beginning at a hub or an operational base to normally well-equipped airports and back.

By properly defining business aviation when it comes to aviation regulation, the temptation to operate on the border between commercial and general aviation would be tempered, thus addressing potential safety concerns.





ACCESS TO MAJOR AIRPORTS: SAFETY PERSPECTIVE



Access to the entire network of airports is partially what makes the business aviation model thrive: bringing customers as close as possible to the intended destination.

Over two travel hours (127 minutes) are saved on average – the inability to achieve this would eliminate our sector's key competitive advantage!

Our operations are not limited to business passengers only. More than 70 business aviation medical flights per day depend on access to the entire network of airports. The business aviation sector is proud to support local communities with these medical flights (transporting passengers, supplies/equipment, blood and organs). More than 80% of these movements are lifesaving.

Being diverted for capacity reasons to airports in the vicinity of the original destination might also increase the need for fuel stops. Longer operations mean more flight duty time spent, potentially inducing crew fatigue and affecting airspace capacity.

Restricting business aviation's access to major airports has other safety implications as well: landing at secondary airports could translate into operational challenges with smaller safety margins.

Though we appreciate that airport and airspace capacity are saturated, pushing business aviation flights out of major airports is not a solution. The way it stands, business aviation flights – including the above-mentioned medical flights – are generally at the bottom of the list when it comes to slot allocations.

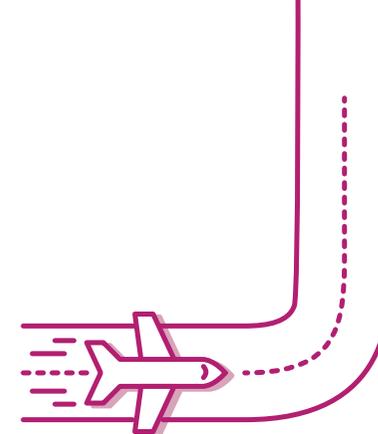
We call for your support in reviewing the slot allocation regulation, as it does not reflect operational reality.



AIRPORTS

Business aviation operators face serious challenges regarding the ability to access a growing number of key airports in Europe. Continued access is threatened by the growth of scheduled carriers, benefiting from automatic preferential rights.

EBAA calls for regulation that allows business aviation to access the same level as scheduled operators through appropriate slot regulation.



SLOTS

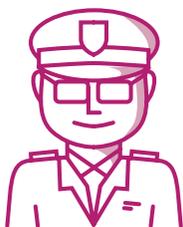
Business aviation cannot adapt to the current mechanism of slot acquisition, nor can it fit the 'programmed non-scheduled' definition. Consequently, it risks being marginalised, if not effectively banned, in the near future from operating at these airports.

The continuous growth in air transport has increased pressure on the capacity available for aircraft movements at certain airports where demand for take-off and landing slots exceeds infrastructure's often scarce capacity.

Thus, owing to the specific nature of business aviation and other non-scheduled operations,

the current slot regulation cannot adequately address the sector's slot allocation need. As it is, the proposed revision prevents business aviation operators from obtaining and maintaining access at any airports that would become coordinated.

EBAA calls for a fair and equitable solution recognising historical rights for all airspace users, with an understanding that each model is an essential component of Europe's air transport policy.



SECURITY

Today, business aviation passengers are mostly funnelled through the same, one-size-fits-all, security checks; it devalues regulation on derogations from common security standards for non-scheduled operators and of the principle of risk-based measures.

↙ EBAA calls on the European Commission and the Member States to adapt security measures to better fit with operations and specificities.



AIRSPACE

Access to airspace and airports remains a key priority. Business aviation needs a proper plan to defragment the European ATM system.

↙ It requires a clear Single European Sky vision, including:

- Governance defining the roles and responsibilities of the various institutions. The European Commission must take the lead of this strategic task.
- Chapters for each major Single European Sky (SES) component (for example, the CNS vision).
- The Single European Sky needs to be inclusive and fit the operational needs of all airspace users, small and large ones, as well as civil and military ones. It should be built on what exists today, on the existing aircraft capabilities. There is no need for new airborne mandates. The European mandates should be set up in a way to ease airspace user's equipment planning and technology investments.
- Public funding must be managed efficiently and allocated to offset air navigation charges.
- The Network Manager should be the leader for network performance information and should be actively engaged in a managerial role to support and facilitate EU-wide decisions in the interests of the network. The Network Manager must be given the legal mandate to properly manage the ANSPs. This will optimise performance and help achieve the 'benefit for all' approach.

AIR TRAFFIC



Business aircraft can operate from small runways or hubs and can fly at low and high altitudes up to FL510. Business aircraft operate worldwide, in all classes of airspace (controlled and uncontrolled), in combination with all types of traffic (commercial aviation, state aircraft, and light aviation).

Business aviation acts as a real spur for innovation in air traffic management (ATM). It will, therefore, be a major contributor to the change and can be among the early movers within this field.

 This requires the proper tools to make it happen, such as access to fair incentive schemes when introducing new measures and retrofits.



INNOVATION AND GROWTH

Business aviation operators are primarily Small and Medium-sized Enterprises (SMEs), and, just as SMEs in any other sector, face significant difficulty in accessing the necessary financing to ensure continued growth.

 The European Union should simplify the application process for SMEs to future calls for proposals and EU funding grants in the area of investment, research, and innovation. This can be done through rebates, differentiated charging schemes, and easing EU-funding allocation.

A Roadmap for European Business Aviation

LET'S WORK TOGETHER!

We look forward to supporting the European Commission and other policymakers in drafting inclusive policies and regulations that take into account the specificities of business aviation operations.

ABOUT EBAA

The European Business Aviation Association (EBAA) is the leading organisation for operators of business aircraft in Europe. Our mission is to enable responsible, sustainable growth for business aviation, enhance connectivity and create opportunities. EBAA works to improve safety standards and share knowledge, to further positive regulation and to ease all aspects of closely tailored, flexible, point to point air transportation for individuals, governments, businesses and local communities in the most time-efficient way possible.

Founded in 1977 and based in Brussels, EBAA represents more than +700 members companies, corporate operators, commercial operators, manufacturers, airports, fixed-based operators, and more, with a total fleet of more than 1,000 aircraft. We provide more than 50 products and services to the business aviation community, including the European Business Aviation Convention & Exhibition (EBACE), Europe's largest business aviation trade show.

For more information, please contact:

Square de Meeûs 37
BE - 1000 Brussels - Belgium

Phone: +32 2 318 28 00
Fax: +32 2 318 28 01

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www.ebaa.org

