



## Global Advanced Air Mobility Forum Summary Report

Presented by:  
Jump Aero



“Covering the Advanced Air Mobility sector feels like reporting on a modern-day gold rush: *dynamic*, exciting, and full of potential. AAM is about enriching communities and delivering real-world benefits. Engagement is key – not just with investors but with every individual who could one day be a passenger.”

—Charles Alcock, FutureFlight

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PRESIDENTIAL LETTER

Good Morning,

We stand at the forefront of an electric aviation renaissance—eyes fixed on the blue skies above. How exciting it is to gather as a global community to share best practices in pursuit of educating and advocating for the broadest public benefit. The Advanced Air Mobility ecosystem is comprised of everyday citizens like you and me. Today, we are building momentum in corners of the globe, near and far, starting at the grassroots.

I want to thank each and every one of our liaisons for their selfless dedication. The Board collectively helps us maintain a keen understanding of the evolving public sentiment toward Advanced Air Mobility technologies. From both ends of the spectrum, they share when local communities engage in protests or demonstrations against infringements, real and perceived, as well as when there are outward expressions of support. In properly trained hands, AAM tools can increase the effectiveness of first responders in incredible ways. Indeed, the best path toward securing public trust is to responsibly accelerate access to public safety personnel. Drones as First Responder (DFR) and eVTOLs as Air Medical Service (eAMS) programs are among the most promising use cases across all cultures.

I would also like to acknowledge the Institute's very first liaison: José Renato Machado. We connected on LinkedIn in December 2022. Our scope was always intended to be global and we have been very fortunate to find so many brilliant, passionate people around the world willing to spare a bit of time to contribute insights to improve the AAM ecosystem. The Institute only officially filed for tax-exempt status with the IRS as a non-profit in April 2023, so I am thoroughly proud of the progress achieved in those 10 months to host the first international gathering of Advanced Air Mobility experts representing nearly 5 billion people.

There is a tremendous amount of work to do to grow public awareness, build public acceptance, and ensure public trust. We do have the right people with the right mindset though. The Board of Liaisons all started with one volunteer who agreed to join. One. He saw the vision of what we could become and the possibilities of collaboration. Thank you, Renato.

To possibilities—

All the Best,  
Dan



Daniel C. Sloat, JD/MBA MRAeS  
Founder & President  
Advanced Air Mobility Institute

## EXECUTIVE SUMMARY

The inaugural Global Advanced Air Mobility Forum marked a significant milestone in the industry, bringing together international stakeholders to discuss the future of air mobility and expand the ecosystem. Key themes included the development of uncrewed aerial system (UAS) and remotely piloted (electric vertical takeoff and landing) eVTOL aircraft and the importance of government engagement. Challenges such as public acceptance, infrastructure development, and regulatory diversity were emphasized across discussions. Speakers from various countries highlighted unique challenges and opportunities, underscoring the need for global collaboration, inclusive dialogue, and clear communication to surrounding Advanced Air Mobility (AAM).

**“Thrilled to see a confluence of global perspectives at the AAM Forum 2024, where the future of air mobility takes shape.”**

—Abidemi Ashiru

A primary theme acknowledged the industry’s tendency towards increasing levels of autonomy in transportation, where the regulatory environment is adapting to facilitate these configurations. The role of the government and NGOs was consistently highlighted. The industry is showing signs of steady work behind the scenes with less emphasis on public announcements but more on actual utilization. Various countries are actively pursuing AAM, with varying degrees of success and at different stages of development.

The collective vision for AAM is one that seamlessly integrates into existing transportation networks, delivering benefits from efficient urban mobility to life-saving EMS services. However, the path forward requires a concerted effort to not only develop the technology and regulations but also to win the trust of future users through active community engagement and clear demonstrations of AAM’s value proposition to society at large. Active engagement with different stakeholders is crucial for operations in certain regions due to geopolitical circumstances. Collaboration between industry players, academia, and governmental bodies is essential for successful integration into national airspace systems.

AAM is seen as a burgeoning domain with immense promise to revolutionize transportation, enhance connectivity, and foster new economic opportunities. However, challenges such as climate conditions, lack of unified regulatory frameworks, and public skepticism are seemingly ubiquitous. Polled individuals across all nations were keen on the fun flying experience that AAM offers but indicated varying degrees of readiness for adoption, with infrastructure and regulatory advancements seen as vital steps forward.

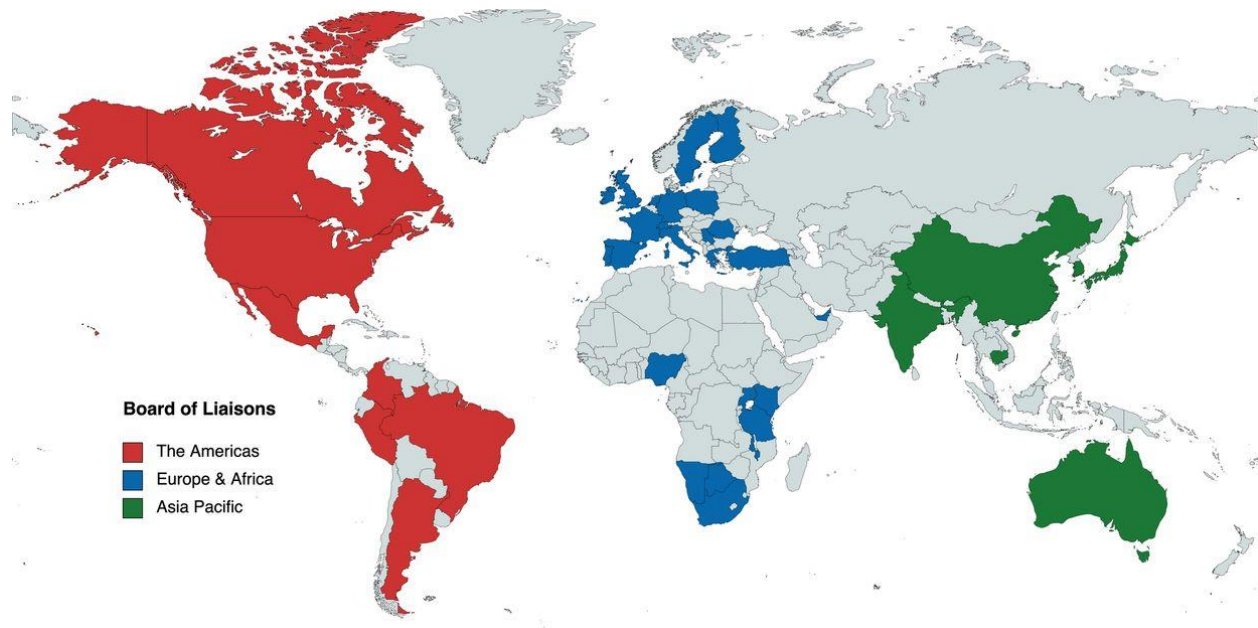
The Forum provided insightful perspectives from various countries on the advancements, challenges, and future potential of Advanced Air Mobility.

CHALLENGES & OPPORTUNITIES

<i>NATION</i>	<i>CHALLENGE</i>	<i>OPPORTUNITY</i>
South Korea	Infrastructure development	Early commercialization
Cambodia	AAM Regulatory catch-up	Youth technology innovation
China	Scaling commercial ops	Strong UAS foundation
India	Lack of regulatory clarity	Public Demand for AAM
Kenya	Drone airspace integration	Enhance delivery of goods
Nigeria	Lack of legal compliance	Potential in cargo logistics
South Africa	Lack of cohesive strategy	Drone corridor development
Sweden	Cold climate for eVTOLs	AAM Public acceptance
Poland	Noise impact concerns	Public Engagement in AAM
Ireland	Attracting eVTOL OEMs	Strong drone industry
Germany	Standardization across states	Leader in Manufacturing
Finland	Lack of coordination	Participation in Int'l projects
Brazil	Low-income barriers	Regional Air Mobility
Mexico	Military control in regulation	Aerospace Manufacturing
Peru	Awaiting regulation updates	Diverse drone applications
Canada	Cold weather operations	Connect remote communities
United States	Infrastructure and energy	Experience in UAS delivery

## PUBLIC SENTIMENT

Public sentiment towards Advanced Air Mobility is cautiously optimistic and generally positive, with excitement about its potential transformative impact. Speakers seemed to be influenced by the less publicized but persistent work towards integrating this technology into practical applications beyond the spotlight. However, concerns about regulatory complexities, feasibility of widespread adoption, infrastructure challenges, safety, noise pollution, and the impact on the environment need to be addressed thoroughly. Challenges in public acceptance and network development are prevalent.



Familiarity with this concept varies by region which underscores the need for ongoing education and clear communication to improve public sentiment. Discussions ranged from regulatory frameworks to practical energy generation needs. Issues such as investor engagement, infrastructure build-out, and most critically, public awareness, are seen as crucial steps toward realizing AAM's potential. There is a call for clearer communication on the benefits and inclusive dialogue to ensure broad community buy-in globally.

An anonymous poll among our 30+ members of the AAM Institute Board of Liaison reflected a split among perceived public sentiment. Below are the results when asked ‘how do people in your country feel about AAM technology?’ (ex. UAS drones, eVTOL air taxis, UTM digital infrastructure, vertiport physical infrastructure etc.):

- 50% of liaisons believe their country leans optimistic
- 40% find their fellow citizens are neutral / unaware
- 10% are cautious, distrustful toward AAM technology

## STATE OF ADVANCED AIR MOBILITY

*ASIA PACIFIC***i. South Korea, Liaison Min Shin**

Min Shin, Founder & CEO of Moviation—a new AAM platform operator, presented an overview of the Advanced Air Mobility landscape in South Korea, including key developments, regulatory frameworks, and public sentiment. South Korea has a dense urban population, with 10 million people in Seoul alone, making it a prime location for AAM potential. The country's AAM industry development is overseen by the Ministry of Land, Infrastructure, and Transport (MOLIT), which plays a crucial role in aviation transportation. They foster an environment where multiple government departments need to work collaboratively due to the unique defense posture with North Korea, making it a complex regulatory environment.

The South Korean government has shown strong support for AAM through initiatives like the K-UAM Grand Challenge, which brings together various companies, both large conglomerates and small startups, to champion the AAM cause. Key players mentioned by Min include car manufacturers like Hyundai Motor, which is developing its own eVTOLs, and SK Telecom's investment in Joby Aviation, an American eVTOL company. Despite this, Min noted that one of the top challenges for AAM in South Korea is public acceptance due to the limited general aviation activities such as commercial helicopters or small aircraft operations. Building a robust AAM infrastructure, which includes constructing sufficient heliports that can evolve into vertiports, is essential for fostering public acceptance and preparing for commercialization.

Another important point raised was the emphasis on using the right communication channels to promote AAM technology and its potential benefits to communities. Platforms like Naver (comparable to Google) and social media such as Instagram and YouTube are key to educating and informing the public. In summarizing South Korea's AAM readiness, Min Shin captured the optimistic view that the government's proactive approach and collaborative efforts among industry stakeholders are setting up South Korea to be among the first countries to commercialize Advanced Air Mobility, despite potential delays and public sentiment challenges.

**ii. Cambodia, Liaison Jennifer Meszaros**

Jennifer Meszaros, an accomplished aviation journalist and consultant, shared an insightful overview of Cambodia's potential in embracing Advanced Air Mobility. Home to a young and growing population, with approximately 16 million people and a significant portion under the age of 30, Cambodia has seen a youthful demographic keen on adopting new technologies, illustrated by the widespread use of UAS drones for recreational purposes.



This trend is especially notable in the rising number of students building drones, like the university students with aspirations to develop a firefighting drone. This spike in drone usage has raised attention toward regulations, prompting the drafting of laws to address drone-related security concerns. The government’s dialogue with industry leaders like DJI signaled a push toward establishing ‘no-fly’ zones for drones, while authorities are enhancing coordination efforts to keep up with the industry’s swift progression.

### **“Cambodia’s youthful, tech-savvy population is driving technology adoption, including drones.”**

Cambodia has witnessed a notable uptake of drones across various sectors, from entertainment and real estate to agriculture, where drones are employed for crop-spraying and field health monitoring. As the country strives to balance industry growth with regulatory frameworks, there’s an identified need for capacity building within the UAS drone sector. Specialized professionals dedicated to staying ahead of drone trends and developments are essential. Although still at an early stage, Cambodia’s openness to tourism and business presents an opportunity for AAM research and development activities, especially in the eVTOL sector. As larger neighbors like China, Japan, and South Korea show developments in AAM, Cambodia may adopt new technologies in response, particularly in emergency response applications. Moreover, a nationwide campaign is being developed to raise public awareness about these technologies, which will help streamline information and permit applications.

Concluding her address, Meszaros emphasized the need for continued development of human capital to support the nascent industry and ensure the technology’s adoption aligns with the country’s unique needs and security requirements. Cambodia’s liberal stance and strategic positioning reinforce its potential as a hub for Advanced Air Mobility innovation, offering opportunities for international partnerships and investment.

#### **iii. China, Liaison Martin Ding**

Martin Ding, Founder & CEO of Albatross.ai Aviation Technology, presented a keen overview of the Advanced Air Mobility ecosystem in China, highlighting the unique aspects of the country’s approach to AAM technology and operation. In his talk, he clarified that China emphasizes uncrewed and remotely piloted aircraft configurations, distinguishing its focus from the piloted aircraft configurations prevalent in the United States and European markets. This emphasis aligns with China’s longstanding foundation in UAS manufacturing pioneered by companies like DJI, and high customer satisfaction.



Martin explained that China has already made significant strides in AAM with the commercial operation of EHang 216, the remote piloted eVTOL aircraft that received type certificate from Chinese aviation authorities. This achievement illustrates China’s readiness to embrace the technology, suggesting a bright future for AAM in the region. He touched upon China’s regulatory framework, which has evolved through the introduction of CCAR Part 92 that covers certifications and flight operations for uncrewed aircraft.



Furthermore, Martin outlined China’s redesigned airspace classifications to facilitate AAM operations, like Class G and Class W airspace reserved for drones and larger uncrewed aircraft. While China has yet to pinpoint an ideal use case, categories such as passenger transportation, cargo delivery, and public services are identified as potential contenders. Air tourism and EMS operations emerge as promising areas where AAM could scale up first, leveraging eVTOL aircraft capacities currently in development.

Martin concluded with the challenge facing EHang, as the first commercial eVTOL in China, to gather enough operational data to analyze and tease out specific applications where Advanced Air Mobility could be most beneficial. This research is a critical step in advancing China’s national ecosystem and determining the most effective use cases. Thus, Martin presented an optimistic but realistic picture of the current state and challenges ahead in China.

#### iv. **India, Liaison Mihir Baxi**

Mihir Baxi, Aviation & Design Manager for Meinhardt EPCM, shared some very exciting updates about India’s venture into Advanced Air Mobility. India is one of the most populated countries in the world, and as such, its rapid urbanization requires innovative transportation solutions. The Indian Government is focusing on improving various transportation infrastructure such as high-speed rails, metro services, and traditional airports. Meanwhile, AAM has not been left behind: Over the past year, important developments have occurred in India, including conferences like the Advance Short Haul Air Mobility Conference. These gatherings have led to Memorandums of Understanding with international companies like Archer Aviation and IndiGo. The latter, a leading Indian airline, plans to start air taxi services in Delhi. Another partnership between SkyDrive Japan and the government of Punjab is exploring how eVTOL aircraft operations could be launched in the country.



**“India is rapidly urbanizing and looking at AAM to upgrade transport infrastructure.”**

There are several startups emerging in India, with most of them having innovative designs and prototypes for VTOL aircraft. Many of them have links with prestigious Indian institutes like IIT, showing the potential for homegrown AAM technology. Furthermore, India’s Directorate General of Civil Aviation (DGCA) is showing a keen interest in catching up and crafting regulations for operations expected to start by 2026. This progress was also discussed at the ICAMS conference in December 2023, where academia, industry, regulators, and other stakeholders convened to strategize on advancing AAM. While India has made considerable progress in adopting these technologies, some challenges were mentioned by Mihir. These include the need for the DGCA and other entities to develop a practical regulatory framework that will support the potential boom in services in just a few short years. Moreover, the conference highlighted the significance of aligning policies, strategies, and cooperation between various entities to ensure the successful and safe integration into India’s skies.

In summary, Mihir shared optimistic insights about India’s forward momentum in Advanced Air Mobility and demonstrated how the country is actively engaging with international partners and nurturing local startups to evolve their airspace capabilities. As the regulations are catching up with industrial progress, India is poised to carve out a significant role in the industry, with concerted efforts being made towards laying down the necessary infrastructure.

## *MIDDLE EAST & AFRICA*

### **i. Kenya, Liaison Mercy Makau**



Mercy Makau, Founder & President of Young Aviators Club of Africa, provided an insightful look into Kenya’s budding Advanced Air Mobility landscape. Mercy discussed the demographic potential of their significant youthful population, with 80% of people being under the age of 35. This representation of a large and vibrant demographic provides an ideal base for technological adoption and innovative prospects within the sector. Mercy highlighted that the Kenyan Civil Aviation Authority (KCAA), under the Ministry of Transport, is the pivotal regulatory body that plays a critical role in the authorization and oversight of aviation activities in the country. She elaborated on the nation’s interests and achievements in AAM, particularly emphasizing the strides made in drone delivery services that facilitate the transport of essential goods and medical supplies to remote areas, through collaboration with Zipline, an international company known for such services.

Kenya has also gained traction due to partnerships with global leaders, indicating that the country could become a forerunner in urban air mobility. Furthermore, Mercy discussed the active role of education and research institutions in fostering innovation. A case in point is the Kenya Technical University, where students have built drone prototypes for a variety of practical applications, including agriculture as well as search-and-rescue missions. Such initiatives highlight a growing, technology-driven interest within the AAM industry. Despite these developments, Mercy acknowledged several challenges that Kenya faces, including the need for more comprehensive regulation, building the necessary infrastructure for eVTOL operations, and most notably, earning public trust. The latter involves engaging communities, building awareness, and ensuring stringent safety standards. Mercy underscored the importance of securing community confidence in the technology through responsible and prudent adoption strategies.

**“Kenya is pioneering urban air mobility and ensuring robust regulatory frameworks for Advanced Air Mobility.”**

In closing, Mercy Makau conveyed optimism, underlying that Kenya’s clear openness, along with its geographic and demographic advantages, serves as fertile ground for the development and eventual adoption of AAM solutions in tourism, cross-border operations, and emergency response. She emphasized that continuing efforts to educate and involve the public, fostering professional expertise, and facilitating a new regulatory framework are critical for the Advanced Air Mobility sector’s advancement in Kenya.

## ii. Nigeria, Liaison Philips Durojaiye

Philips Durojaiye, Founder & CEO of Titan Air Mobility, shared valuable insights on the state of Advanced Air Mobility in Nigeria during the conference. With a population of around 213 million, the country presents an intriguing landscape for AAM technology. Although there are millions of drones in the country, only 16 companies have obtained legal licenses to operate them, highlighting a disparity between drone usage and regulatory compliance. Nevertheless, these companies strive to adhere to safety standards akin to those set by the FAA or ICAO to avoid regulatory crackdowns.



Durojaiye noted the significant opportunities for AAM across Africa, given the enthusiasm for new technologies, provided they are safe and economically viable. He pointed to the success of Zipline’s deployment in several African countries, including Nigeria, as an indicator of the continent’s openness to adopting solutions more readily than some more regulated markets like the United States. Looking at the future of aviation in the region, Durojaiye predicted a growth emphasis on regional and cargo transport before urban air mobility solutions take off in Nigeria. The country shows a strong inclination for private ownership of transportation means, which could one day translate into a robust market for personal eVTOL aircraft. He believes that the nation, as well as the wider African continent, is positioned to adopt and utilize AAM technologies expeditiously as long as the associated projects demonstrate sufficient benefits.

Overall, Durojaiye’s presentation painted a picture of positivity and readiness in Africa for the advent of Advanced Air Mobility solutions, with the appropriate regulatory support and a clear focus on safety and economic impact.

## iii. South Africa, Liaison Louise Jupp



Louise Jupp, Editor to the Drone Professional book series, provided an insightful overview of the drone industry in South Africa, with a particular emphasis on the challenges and opportunities faced in the greater realm of Advanced Air Mobility. She explained that South Africa has robust civil aviation regulations under Part 101 that mandate certification for operators to perform specific activities. The country is home to approximately 100 certified operators focusing on a variety of applications including agriculture, mining, conservation, and surveying.

Additionally, South Africa has a handful of original equipment manufacturers (OEMs) for aircraft and software development that primarily serve the global market, leveraging its well-established aerospace industry.

**“Public acceptance and regulatory coordination are significant factors in AAM adoption.”**

Despite these achievements, there are significant challenges hindering AAM progress in South Africa. Louise noted the absence of a cohesive national strategy or clear government ambition specifically for the nascent sector. This lack of direction has resulted in a shortage of large-scale funding, a lack of government-supported research and development, and a slow regulatory evolution—all of which are essential for nurturing such emerging technologies. Nevertheless, there are opportunities for growth. Louise highlighted an increasing awareness within certain government departments and the private sector. Efforts like the UTM Corridor Group and provincial initiatives aim to establish corridors to support AAM operations. There is also a push to adopt categorization models similar to those in the European Union, indicating a readiness within the industry to follow international standards that may aid in overall integration of systems.

Louise emphasized the importance of improving the visible impact of the drone industry to gain public interest and government support. She suggested that significant events, such as the Olympics, could potentially serve as catalysts for investment and interest in South Africa. As the aviation community continues to build on these opportunities and develop clear coordination efforts, there is optimism that the industry can overcome the existing challenges and increase support for Advanced Air Mobility.

## *EUROPE*

### **i. Portugal, Liaison José Renato Machado**

Renato Machado, AAM Head of Engineering for CEiiA, explained that Portugal has emerged as a proactive participant in the Advanced Air Mobility sector, with several landmark achievements highlighting its commitment to integrating AAM into its transportation landscape. The country hosted the first Advanced Air Mobility Summit in Lisbon, which served as a critical platform for international dialogue and collaboration among stakeholders. A significant partnership between Helibravo and Bluenest aims to establish the first vertiport network in Portugal, paving the way for both passenger transport and cargo logistics.



The Fly PT Project, a collaborative initiative supported by European regional development funds and involving 17 different entities including universities, research institutes, and companies, has been a cornerstone in Portugal's AAM development efforts. The project achievements include the conceptualization and public presentation of a vehicle designed for both horizontal and vertical mobility, which was showcased through a full-scale cabin and functional prototypes.

Despite these advancements, Portugal faces challenges in fully realizing AAM's potential, particularly in terms of U-space implementation and obtaining permits for Beyond Visual Line of Sight (BVLoS) operations over urban and populated areas. The regulatory body in Portugal is actively working to address these challenges by defining specific volumes and areas for U-space, enhancing safety measures for operations near critical areas through technologies like flight termination systems and parachutes.

Portugal's strategic approach, characterized by fostering innovation, regulatory advancements, and international collaboration, positions the country as a leader in the European ecosystem. The country's efforts to overcome technological challenges exemplify a commitment to integrating Advanced Air Mobility into its transportation infrastructure, promising a transformative impact on urban, suburban and regional mobility.

## ii. Sweden, Liaison Isabelle Nyroth

Isabelle Nyroth, Founder of Yvarbrims, provided insights into the Advanced Air Mobility landscape in her country, which is known for its openness to new technology and innovation.



Sweden, with a population of approximately 10 million people, is actively exploring the potential of AAM, particularly in the areas of last-mile transportation and UAS traffic management (UTM). Isabelle highlighted that Sweden is home to a few established companies within the sector, focusing on services, hardware, and vertiport operations. These companies have gained prominence for delivering goods via drones, helping to increase public acceptance of the technology.

In contrast to the positive developments, Sweden faces several challenges in fully embracing AAM. One of the main obstacles is the lack of a comprehensive regulatory framework specifically designed for such operations. However, the Swedish Transport Agency, known as Transportstyrelsen, is receptive to the idea of evolving regulations to better support the AAM industry. Another challenge Isabelle noted is the difficulty in securing funding and budgets for aviation innovations due to the regulatory uncertainties. Geographical conditions, such as the cold climate with winter temperatures dropping to as low as  $-22^{\circ}\text{C}$ , also pose unique challenges for industry development and operations.

Public acceptance is another area of interest. Isabelle pointed out that while the Swedish public is generally impressed with the concept of AAM and passenger drones, they may have reservations as the technology becomes more prominent in urban areas. The need to prove the usefulness, benefits, and economic viability of eVTOLs is crucial for gaining wider community support. Isabelle remarked that information and discussions surrounding AAM in Sweden are primarily found on professional networking platforms like LinkedIn, where global and local news is shared within dedicated communities.

### **“Sweden’s cold climate poses geographical challenges for AAM development.”**

In summary, Sweden is taking proactive steps in planning and executing AAM projects with a focus on integrating drone delivery logistics into its future infrastructure. The country is actively working to address the challenges of regulatory frameworks, funding, and public acceptance to cement its place in the evolving market. Despite the geographical challenges, there is hope that with continued efforts, Advanced Air Mobility can become a valued and integral part of Sweden's overall transportation ecosystem.



### iii. Spain, Liaison Luis Lira

Luis Lira, Senior Sector Consultant for NTT DATA, described Spain's approach as one that reflects a comprehensive strategy aimed at revolutionizing urban transportation through the adoption of sustainable and inclusive mobility solutions. Backed by regulatory bodies such as the European Union Aviation Safety Agency (EASA) and the Spanish Aviation Safety and Security Agency (AESA), Spain has established a conducive environment for AAM development. This is evidenced by the creation of five UAS test centers across the country, underscoring Spain's commitment to becoming a central player in this domain.



The active involvement of leading eVTOL manufacturers, including Airbus, Lilium, and EHang, alongside infrastructure management companies focusing on vertiport development, signifies Spain's strategic positioning in the AAM landscape. These efforts are geared towards establishing an integrated transportation ecosystem that prioritizes safety, efficiency, and environmental sustainability. Despite its ambitious vision, Spain confronts several challenges that necessitate a robust regulatory framework to ensure airspace safety and the seamless integration of AAM technologies. Key issues include the implementation of U-space for effective UTM and the enhancement of long-distance communication systems essential for the operation of eVTOL services. Spain's strategy to navigate these challenges involves a collaborative approach: engaging regulators, industry stakeholders, and the public to foster a secure, efficient, and environmentally friendly ecosystem. National initiatives in developing Advanced Air Mobility infrastructure, coupled with regulatory advancements and strategic partnerships, reflect a forward-looking approach to urban mobility. By addressing the technical and regulatory challenges head-on, Spain is laying the groundwork for a future that promises to transform travel and contribute to environmental sustainability.

### iv. Poland, Liaison Malgorzata Wojtas

Malgorzata Wojtas, Head of the Mechanical & Thermal Section for Lukasiewicz, outlined the current state and future outlook of Advanced Air Mobility in Poland, highlighting key points related to the country's achievements in AAM, potential challenges, and public sentiment. Poland, with a population of roughly 33 million people, is actively engaging in projects, including participation in pilot programs for urban flights and cargo drone operations. The nation's key regulatory body overseeing these ventures is the Polish Aviation Authority, which collaborates closely with various institutions, including Malgorzata's own, to set safety guidelines and develop terms for the future of aviation.



Unfortunately, Poland faces several challenges that could affect growth. The country is yet to establish a comprehensive infrastructure that supports AAM, with particular emphasis on safety and environmental impact. Public acceptance remains a hurdle, as there are concerns about issues such as noise pollution from drone operations near urban areas.

Furthermore, Malgorzata mentioned that while there are startups in Poland working on air taxis, the local market may not be fully ready for the implementation of AAM, highlighting that some Polish companies are looking toward other countries for export opportunities. An interesting fact emerged from her research: many Polish citizens see the entertainment potential in flying as a benefit of AAM, implying a potential cultural readiness and enthusiasm for this new mode of transportation. In terms of information dissemination, Malgorzata suggested that LinkedIn and Twitter are widely used platforms for this kind of news in Poland. Public television also plays a role in educating citizens about new technologies, including drones and future mobility.

### **“Poland participates in European AAM projects but needs more infrastructure and noise management.”**

In conclusion, Malgorzata’s industry outlook in Poland is cautiously optimistic. While the country is involved in ongoing projects and the public shows a positive interest in the fun aspects of Advanced Air Mobility, there are still significant challenges to overcome. Establishing necessary infrastructure, ensuring safety, managing environmental impacts, and earning public trust are vital steps that need to be addressed to ensure successful integration into Polish society.

#### **v. Italy, Liaison Salvo Forzese**

Salvo Forzese, Project Officer for ANCI TOSCANA, explained that Italy’s foray into Advanced Air Mobility is characterized by its strategic focus on leveraging these technologies to enhance connectivity and mobility across its diverse geographical landscape. The Italian government, in collaboration with national aviation authorities and industry stakeholders, has embarked on a path to integrate AAM into the country’s transportation ecosystem, emphasizing the importance of sustainability, safety, and innovation.



ENAC, the Italian Civil Aviation Authority, has been instrumental in fostering a regulatory environment that supports the safe and efficient development of AAM. Through initiatives such as the establishment of experimental corridors for BVLOS operations and the creation of dedicated spaces for UAS testing and innovation, Italy is positioning itself as a key player in the greater European market. These efforts are complemented by collaborations with industry leaders and academic institutions to drive research, development, and expedited commercialization of AAM technologies.

One of Italy’s notable achievements in this space is the launch of the Urban Air Mobility initiative in collaboration with the City of Milan. This project aims to demonstrate the feasibility and benefits of integrating AAM solutions into major cities, addressing challenges related to traffic congestion, pollution, and urban sprawl. The initiative also focuses on public engagement and stakeholder collaboration to ensure that developments align with community needs and expectations. However, the nation faces challenges related to airspace integration, public acceptance, and the harmonization of regulatory frameworks at the European level. To overcome these obstacles, Italy is actively participating in international forums and working groups, contributing to the development of standards and best practices for AAM operations worldwide.

Their approach is marked by a commitment to innovation, regulatory leadership, and community engagement. This underscores the country’s ambition to realize the full potential of Advanced Air Mobility in enhancing urban and regional travel. By addressing the technological, regulatory, and social dimensions, Italy is paving the way for a future where aviation contributes significantly to sustainable and efficient transportation solutions.

#### vi. Ireland, Liaison Julie Garland

Julie Garland, Founder & CEO of Avtrain, is a seasoned expert with diverse experience in traditional aviation and regulatory frameworks. She provided insights into the evolving Advanced Air Mobility landscape in Ireland. A company specializing in the training and certifying drone pilots and operators, Avtrain is a key figure in European drone associations. Julie highlighted the foundational role of the drone industry in the development of AAM.



With a population of 5.2 million, Ireland does not currently have a substantive eVTOL industry, largely due to the absence of an Original Equipment Manufacturer (OEM) within the country. Garland suggests that the presence of an OEM could significantly stimulate regulatory advancement and infrastructure development for AAM by focusing the attention of national authorities on the emerging sector. Ireland boasts over 17,000 certified drone pilots, with more than 500 operating in the specific category and over 100 operational authorizations granted. The establishment of 4 light unmanned aircraft system operator certifications (LUCs) paves the way toward autonomous and expanded operations. These LUC holders are empowered to authorize their own drone operations, representing a step toward self-regulated AAM activities.

Garland detailed some key initiatives, such as the EALU-AER Project—an endeavor to build out a digital sky demonstrator, designed to facilitate low-level airspace management and pave the way for the AAM industry. Additionally, she discussed a feasibility study at Shannon Airport to establish a vertiport (necessary landing infrastructure for eVTOLs) that would require government backing for expansive industry growth. Despite these efforts, challenges persist. The speed of regulatory development, societal acceptance of such technology, and adequate funding all pose hurdles to Ireland’s AAM ecosystem. Garland remains hopeful, viewing events like the upcoming Ryder Cup in 2027 as a realistic objective for services deployment. She argues that while the industry is well-understood within professional circles, significant effort is required to educate the larger public on the benefits, particularly its environmental advantages.

**“Ireland is leveraging its drone industry experience as a stepping-stone towards a robust AAM sector.”**

In concluding her presentation, Garland emphasized the significance of online platforms like LinkedIn in promoting open communication about Advanced Air Mobility. Her insights reveal a nascent but determined industry in Ireland, characterized by a thorough understanding of the existing regulatory and operational framework, clear identification of the challenges and opportunities that lie ahead, and an optimistic outlook for future aviation advancements.



**vii. Greece, Liaison Christos Xylokotas**

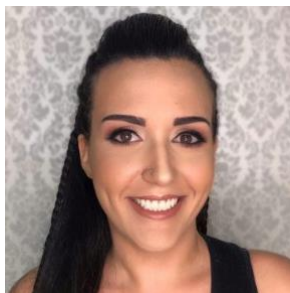
Christos Xylokotas, an accomplished pilot in the Hellenic Air Force with qualifications in helicopter and RPAS operations, articulated Greece's approach to Advanced Air Mobility as one that is deeply rooted in its strategic vision to enhance connectivity across its numerous islands and remote regions, leveraging AAM to overcome geographical challenges and improve accessibility. The Greek government, in partnership with aviation authorities and the private sector, is actively exploring the integration of eVTOL and UAS solutions to bolster its tourism industry, emergency response capabilities, and inter-island transportation.



The Hellenic Civil Aviation Authority (HCAA) plays a pivotal role in establishing a regulatory framework conducive to AAM, focusing on safety, innovation, and environmental sustainability. Greece has initiated several pilot projects aimed at testing viability in various applications, from passenger transport to medical supply delivery, emphasizing the potential for AAM to significantly reduce travel times and carbon emissions. One of Greece's flagship initiatives involves the development of air corridors for eVTOL aircraft, designed to link key tourist destinations with major urban centers and airports. These efforts are complemented by collaborations with European consortia and participation in EU-funded research projects, highlighting Greece's commitment to aligning its AAM strategy with broader European goals for smart, sustainable mobility.

However, Greece faces unique challenges, including the integration of AAM into the existing air traffic management system, the need for robust infrastructure to support aerial operations, and ensuring public acceptance of new mobility solutions. To address these issues, the Greek government is investing in public awareness campaigns, infrastructure development projects, and the adoption of international best practices in regulation and safety. The nation's strategic focus on AAM as a tool for enhancing regional connectivity and supporting economic growth demonstrates a forward-looking approach to addressing its unique landscape. By fostering innovation, regulatory leadership, and cross-sector collaboration, Greece is positioning itself as a leader in the Mediterranean region, aiming to realize the transformative potential of Advanced Air Mobility for its citizens and the global community.

**viii. Germany, Liaison Veruska Mazza Rodrigues Dias**



Veruska Mazza Rodrigues Dias, AAM Consultant for Accenture, provided insightful information about the state of Advanced Air Mobility in Germany. With 13 years of experience in aviation—seven of which have been focused on AAM—Veruska is currently consulting on business strategy and product development in this emerging sector. She shared that although Germany is divided into 16 states, the aviation sector is under a unified regulatory framework. The Luftfahrt-Bundesamt (LBA) authorizes operations in nine states, while other states manage authorizations directly.

A challenge in Germany is the lack of standardization due to several state authorities involved in the decision-making process. However, this actually accelerates the AAM market at the national level by avoiding bottlenecks common in other countries and promoting commercial scalability. Cologne, home to the European Union Aviation Safety Agency (EASA) headquarters, serves as an important hub for discussions and is influencing the nation's involvement in this sector. Veruska highlighted significant achievements, notably German-based aircraft manufacturers, such as Volocopter and Lilium, that position the country as a leader in Advanced Air Mobility technology. These manufacturers are leaders in product development and certification, fostering advancements in regulation and scaled commercial operations. The implementation of U-space (a system for managing uncrewed aircraft) is advancing rapidly in Germany.

Two recent projects were noteworthy: the U-space real laboratory at the German Aerospace Center (DLR) site, designed to realistically simulate different geographic regions, and the U-space Northwest initiative, both aiming at integrating crewed and uncrewed aviation.

**“Germany is rapidly developing in the AAM market, particularly in manufacturing and regulatory advancements.”**

Furthermore, German aerospace organizations have recently updated national strategies and action plans, promoting a clear framework for the industry's evolution by 2030. National surveys, such as the Horizon UAM project, are providing insights into local acceptance and key challenges, helping to promote sustainable AAM implementation. The main challenges identified are social acceptance for individual or commercial prospects, providing competitive pricing and quicker access to airports, and harmonizing global rules for operation and licensing. Veruska highlighted that the country has a conservative approach to public communication about this new field, primarily utilizing specialized websites and news channels like DW News, but social networks such as LinkedIn are playing an increasingly important role.

In summary, Veruska's insights offer an favorable view of Germany's progress in AAM, its leadership in the field, strategic market movements, and the collaborative efforts underway to overcome challenges and leverage opportunities for Advanced Air Mobility technology.

#### **ix. Finland, Liaison Ari Etelävuori**

Ari Etelävuori, Team Leader at Haaga-Helia University of Applied Sciences, presented a candid view of the country's current standing in the AAM field. With 34 years of experience in the Finnish aviation industry coupled with his recent academic role, Ari brings a wealth of wisdom, particularly on the synergy between vintage aviation and emerging technologies. Finland, with a modest population of 5.5 million, has demonstrated meaningful involvement in AAM through participation in European Union projects such as Airmour, focused on urban mobility, and a commitment to research and development, evidenced by the collaboration with the drone company Drónomics.



In contrast to these positive notes, Ari outlined several challenges Finland faces and the lack of a coordinated national approach toward AAM stands out as a notable hurdle. There seems to be no clear leader in this space locally, which is resulting in fragmented progress across various initiatives. Regulatory frameworks are evolving slowly, affecting both public perception and the pace at which the ecosystem can advance.

Ari also touched upon the role of educational institutions, such as the one he represents, in bolstering the AAM industry. These establishments are engaging with the technology and attempting to position Finland on the map through educational seminars and programs. However, a gap remains in translating this academic interest into the commercial and operational domain, mainly due to the youth not yet viewing AAM as a viable source of employment. In terms of public engagement, Ari highlighted the country's general openness to regulations and safety prioritization, which are adopted positively by stakeholders and the public. Yet, to fully capitalize on this sentiment, more visible advances and successful implementations are needed to foster popular interest and public trust.

Finland's path towards integrating AAM into its aerospace sector is nascent, cautious, and measured. With the right stimuli, such as increased government involvement and clearer policy directions, as well as an impetus on showcasing tangible benefits to the public, Finland could progress from its current state of watchful hesitation to proactive participation in the Advanced Air Mobility arena.

#### x. **United Kingdom, Liaison Philip Butterworth-Hayes**

Philip Butterworth-Hayes, Publisher at Unmanned Publications, articulated astute observations surrounding the current state and future prospects of Advanced Air Mobility in the United Kingdom. He outlined that the country is aiming for substantial growth in the sector, with the year 2027 being earmarked as a pivotal point for the industry. By that time, the UK anticipates having the necessary standards, regulations, and proven technology in place to enable large-scale deployment and commercialization of AAM services.



Butterworth-Hayes discussed the unique approach in which the UK's aviation landscape is unfolding, characterized by the establishment of infrastructure even before the finalization of regulations and standards. He mentioned that several eVTOL manufacturers and infrastructure management companies are actively working towards developing networks of vertiports with the hope of launching air mobility services across the country. Although the regulatory framework is still evolving, Butterworth-Hayes expressed confidence about the UK's future in AAM, anticipating that the true scaling of air mobility services will require vehicles with larger capacities of 30-40 seats, as opposed to smaller one or two-seater models that are typical today.

**“By 2027, the UK’s AAM industry will see significant growth, especially in larger eVTOLs.”**

The UK's AAM market is presently invigorated by numerous test centers that illustrate the nation's serious commitment to fostering innovation in air travel. Butterworth-Hayes highlighted challenges such as the need for robust regulatory development, infrastructure financing, and public acceptance. Despite these hurdles, he was confident that the UK would witness the transition of Advanced Air Mobility from experimental to fully commercial operations, particularly in regional and cargo transportation. He concluded by emphasizing the importance of an inclusive approach to air mobility that is anchored in community needs and participation.

## *THE AMERICAS*

### **i. Brazil, Liaison Eduardo de Vasconcellos**



Eduardo de Vasconcellos, CEO of RPAS Ops Consulting, shared valuable insights into Brazil's Advanced Air Mobility landscape during the virtual conference. Noting that Brazil has a population of over 216 million people sprawling across a diverse geography, Eduardo emphasized the challenges and opportunities present in the nation's aviation sector. Regulatory authority ANAC, along with DECEA and ANATEL, form the core regulatory framework overseeing aerial activities, including AAM technology implementation and oversight.

He pointed out that because Brazil has vast regions that are geographically and topographically challenging, there are significant opportunities for regional air mobility, particularly in underserved areas where traditional airlines seldom operate. Furthermore, the cargo market presents great potential for growth, considering that only a small fraction of cargo is currently moved by air. Eduardo detailed some of the advancements and regulatory efforts in the country, such as ANAC's receptiveness to foreign ownership in civil aviation and its involvement with international partners like FAA and EASA. He mentioned noteworthy projects, including recent issuance of a proposal for certification requirements for Embraer's eVTOL subsidiary, Eve Air Mobility, highlighting local commitment to keeping pace with such advancements.

### **“Brazil’s unique geography presents significant opportunities and challenges for the evolving AAM market.”**

Eduardo also identified challenges such as the lack of capital and the overall risk aversion among Brazilian investors, hindering large-scale AAM project launches. Furthermore, he acknowledged the need to harmonize the current regulatory environment with novel aviation operations. On the media front, he noted that mainstream platforms including Globo and social networks such as Facebook and LinkedIn are primary channels for technology communications. These platforms are essential for raising awareness about AAM developments and regulatory guidelines within the Brazilian community.

In conclusion, the country's involvement in international regulatory bodies, commitment to innovation, and welcoming stance toward foreign investment are promising indicators for AAM growth in Brazil. However, the need for fresh capital, regulatory updates, and overcoming risk-averse attitudes are challenges that must be addressed to fully realize its potential.

## ii. Colombia, Liaison Paula Velandia Congote

Paula Velandia Congote, an experienced marketing expert with a focus on UAS drones, detailed Colombia's exploration and adoption of Advanced Air Mobility as signifying a transformative step towards addressing its diverse and complex transportation needs. The country's topography, characterized by mountainous regions, dense forests, and vast rural areas, presents unique challenges and opportunities for the integration of AAM technologies. The Colombian government, in collaboration with civil aviation authorities and the private sector, is actively working towards leveraging AAM to enhance connectivity, improve access to remote areas, and support economic development.



A focal point of Colombia's efforts is the development of infrastructure and regulatory frameworks that facilitate the safe and efficient operation of electric vertical take-off and landing aircraft and drones. The Civil Aviation Authority of Colombia (Aerocivil) is at the forefront of these efforts, implementing pilot projects and partnerships aimed at testing AAM applications in cargo delivery, emergency medical services, and passenger transport. One of the key strategies in their national roadmap is the establishment of urban and regional air mobility corridors that connect major cities with remote communities, thereby reducing travel times and supporting economic activities in underserved regions. These efforts are bolstered by Colombia's commitment to sustainability, with a focus on reducing the environmental impact of transportation through the adoption of electric and hybrid propulsion technologies. Local initiatives also emphasize the importance of community engagement and stakeholder collaboration. Public awareness campaigns and participatory planning processes are integral to ensuring that AAM solutions align with the needs and expectations of various communities, fostering public acceptance and support for these innovative mobility options.

In summary, Colombia's approach reflects a comprehensive strategy that addresses the country's unique geographic and socio-economic challenges. Through regulatory innovation, infrastructure development, and cross-sector partnerships, Colombia is a leader in Latin America. Efforts to integrate Advanced Air Mobility into its transportation ecosystem promise to enhance connectivity, support sustainable development, and improve the quality of life for its citizens.

## iii. Mexico, Liaison Hector Rida Olvera

Hector Rida Olvera, a professional aerobatic pilot, passionately spoke about the current landscape and bright future of Advanced Air Mobility in his country. Mexico, with a population of around 126 million people, is overseen by the Federal Telecommunications Institute which is crucial for aviation and has recently undergone changes with a shift from civilian to military oversight. This transition is rather significant as it affects the decision-making processes around AAM. Hector highlighted several exciting opportunities within the Mexican aviation industry, such as expedited cargo delivery and superior aerospace manufacturing in Queretaro, promoted in partnership with IFT.





Hector noted that public sentiment is enthusiastic, with an eagerness to move the industry forward. However, only a few companies are leading these efforts locally. Companies like EHang are taking early roles in Mexico, seeking certification for their vehicles, signaling that despite some challenges, there is strong momentum for AAM in Mexico.

**“Mexico is excited to put the industry to work here. We are positive and looking forward.”**

An important aspect of public acceptance revolves around the migration patterns within Mexico. As populations move from urban centers to rural areas, the need for commuting solutions presents a prime opportunity for AAM to provide novel transportation services. However, there are challenges to overcome, especially in terms of working with authorities who may lack understanding of the industry and in gaining citizen’s confidence to deploy these technologies effectively. Furthermore, Hector discussed the potential of Mexico as a strategic hub for manufacturing, given its geographic location and proximity to key markets like the United States and Canada. This advantage, along with regulatory alignments and mature aerospace industries already present, could serve as catalysts for bringing additional aerospace manufacturing to and boost the national economy.

In conclusion, Hector’s summary for Mexico depicted a country on the brink of thoroughly embracing Advanced Air Mobility. Although faced with regulatory and public acceptance challenges, there is optimism and strong interest in leveraging their strategic advantages, making it a potential key player in the AAM industry’s future.

#### **iv. Peru, Liaison Kimberly Rojas Ruiz**

Kimberly Rojas Ruiz, Engineering Manager at UAV Latam Peru, delivered insights into the country’s current state of Advanced Air Mobility, especially in drone technology. She began by emphasizing the regulatory environment, notable achievements, and persistent challenges. As an aeronautical engineer and a key figure in UAS operations and sustainable development projects, Ruiz provided a unique perspective on Peru’s position in the AAM landscape.



Peru, with its diverse geography and a population of around 34 million, is navigating the emerging domain under the guidance of its civil aviation authority, which already has established regulations for drone operations. Despite having a foundational regulatory framework, Ruiz identified the need for updates to keep pace with rapid technological advancements in the Advanced Air Mobility sector.

Highlighting significant progress, Ruiz pointed out the wide variety of drone use cases in Peru—especially in critical sectors such as mining, agriculture, and tourism. These applications demonstrate the potential impact of drone technology on economic activities and environmental conservation. Furthermore, the emergence of drone-focused events and the growing interest among university students and startups in drone technology signal a vibrant and evolving AAM community in South America.

However, Ruiz underscored challenges that could hinder growth, including slow legislation and geographical hurdles posed by high-altitude operations in the Andes mountains. These factors, combined with the need for technological advancements to overcome such limitations, present obstacles to the seamless integration of AAM solutions in Peru.

**“Peru is exploring innovative drone uses, although regulation updates are necessary for further growth.”**

In conclusion, Ruiz’s presentation on the AAM sector showcases a country at the cusp of significant growth in drone technology application, facing the dual challenges of regulatory adaptation and geographical constraints. The enthusiasm among the youth and the industry’s focus on sustainable development goals offer a solid foundation for realizing the full potential of Advanced Air Mobility in Peru.

**v. United States, Liaison Chris Fernando**

Chris Fernando is a consultant and researcher with over 20 years of experience working for organizations such as the Department of Defense (DoD), Federal Aviation Administration (FAA), and NASA. He also serves as an adjunct professor at the Florida Institute of Technology. Chris highlighted the significant advancements in Advanced Air Mobility in the United States, emphasizing the country’s passion for innovation, exemplified by the substantial number of active contenders for UAS and eVTOL leadership. With the FAA releasing key documents like ConOps 2.0 and the UAS in the NAS Integration Plan, there has been a focus on low-altitude operations and urban air mobility.



Chris lauded the establishment of the FAA’s BEYOND program to understand how small uncrewed aircraft systems can be utilized for various use cases, including package deliveries. This program has succeeded previous initiatives and now includes various state partners conducting regular delivery operations, with healthcare use cases slowly rising in importance, benefiting communities and healthcare systems.

**“AAM will not only revolutionize the future of aviation, it will transform transportation systems and access for all people.”**

Chris pointed out the following challenges faced by the nascent industry: the complex US national airspace system and competing infrastructure needs present significant obstacles, with the need for new energy solutions such as solar, microgrids, or hydrogen to power AAM technologies effectively. Moreover, there are still many steps to be taken to successfully integrate these technologies, requiring collaboration with multiple federal agencies highlighted by the inter-agency working group on Advanced Air Mobility. Lastly, he pointed out that the US is actively working to secure public trust in AAM technology, which is critical for its widespread adoption. The future of AAM in the US seems promising as the country continues to strive towards a unified vision of urban and regional air mobility that is safe, efficient, and poised for sustainable growth.

**vi. Canada, Liaison Katherine Ayre**

Katherine Ayre is a commercial pilot, municipal lawyer, and the Founder of CAYRES. She provided an in-depth overview of Canada’s approach to Advanced Air Mobility, focusing on regulatory frameworks, achievements, and the unique challenges presented by their geography and climate. Ayre brings a comprehensive perspective on integrating AAM infrastructure within Canada’s diverse landscapes.



Canada, with its vast territory of nearly 10 million square kilometers and a population of approximately 39 million, operates under federal aviation regulations managed by Transport Canada and Nav Canada. The country’s approach to novel aviation infrastructure, including droneports and vertiports, involves collaboration across federal, provincial, territorial, and municipal levels. This cooperative framework is essential for navigating the logistical and legal complexities of AAM implementation in a nation characterized by its challenging winter weather and relatively isolated, remote communities.

Ayre highlighted Canada’s history of aviation law since 1919 and its position as a fast follower in this market. The establishment of the Canadian Advanced Air Mobility National Consortium (CAAM) by the National Research Council is a testament to the country’s commitment to catalyzing the AAM industry.

**“Canada is poised to be a leader in AAM, focusing on inclusive and sustainable development.”**

The presentation underscored the importance of focusing initial efforts on healthcare and humanitarian services. This approach not only prioritizes societal benefits but also builds a solid foundation for the financial viability of AAM operations. Ayre also addressed the critical need to consult and involve Indigenous communities in the development of infrastructure, ensuring that initiatives are inclusive and respectful of their rights and territories.

In summary, Katherine Ayre’s insights into the Canadian perspective highlight the country’s strategic, inclusive, and environmentally conscious approach to integrating Advanced Air Mobility. By leveraging its rich aviation history, collaborative regulatory framework, and focus on social impact, Canada will undoubtedly contribute to the responsible and equitable development of AAM.



## SPECIAL PRESENTATIONS



Dr. Neelakshi Majumdar, an assistant professor at the University of Arkansas, discussed the research emphasis on aerospace safety, including AAM operations. Transitioning safety standards from traditional aviation to AAM and managing new risks are vital for integrating into existing infrastructure. In India, opportunities for transportation innovation exist, but challenges like regulatory frameworks, funding, and workforce development need attention for successful operations.

Philip Weissman, an experienced aviation attorney, delved into the legal and regulatory nuances in the US, expounding upon the involvement of various federal agencies and state governments. Weissman outlined the evolving AAM landscape in the United States, including the role of investors and complimentary stakeholders. The fervent pace of change drives a need for careful government collaboration.



**“The Advanced Air Mobility industry in the United States requires more than just FAA involvement; it's a complex interagency effort.”**



Amal Muse proposed an accessible AAM ecosystem considering people with disabilities. Muse emphasized the importance of universal design principles and public-private partnerships. Citing Wisk Aero's Generation 6 aircraft as a case study, Muse showed how wider doors and digital interfaces accommodate wheelchair use, and how early-stage design considerations can future-proof accessibility.

The Head of Vertical Mobility Academy for FIA / TCS, Nicolas Brieger, spoke on the challenges of global regulatory diversity and social acceptance. He noted that AAM has varied applications from agriculture to emergency response.



Dr. Saverio La Francesca, President of Longitude Mobility, detailed the current practices in medical organ transport and the inefficiencies therein. He emphasized the need for an improved system that takes advantage of AAM technology to enhance the organ supply chain, stressing the importance of standardized practices and nationwide implementation for a more effective supply chain delivery network.

ADDRESS BY CHIEF OF STAFF

Greetings,

It was a great honour to serve as the master of ceremonies for the inaugural Global Advanced Air Mobility Forum. I dare say it was a resounding success which fostered meaningful dialogue, collaboration, and knowledge exchange among international stakeholders and great minds in the field of Advanced Air Mobility.

By the numbers, we had 18 countries join us live to present while another 5 provided pre-recorded audio insights that were then presented to the global audience on the day of the Forum. An additional 6 countries provided written remarks that can be found in the Appendix.

Our Board of Liaisons represents 38 individual countries so far and we will continue to grow until 200 members. If you are reading this and your country is not represented, I encourage you to please consider stepping forward so that your country can have a proper voice at the next forum in July 2024. This is critical as it provides you the opportunity to have a say and positively impact the AAM ecosystem. We are seeking professionals with expertise and a strong working knowledge of UAS or eVTOL technologies with a genuine passion for our mission for broad public benefit.

These are exciting times as we move into the reality of future flight. And as the industry continues to evolve and expand, events like these play a crucial role in driving innovation, fostering partnerships, and shaping the next generation of mobility on a global scale.

Sincerely,

A handwritten signature in black ink, appearing to read 'A. Ashiru', with a stylized flourish at the end.

Abidemi Ashiru  
Chief of Staff  
Advanced Air Mobility Institute

## APPENDIX

## i. Botswana



Marang Mbaakanyi, Founder & CEO of Drones for Africa, provided an overview of the current state of Advanced Air Mobility in Botswana, focusing on key areas such as regulatory oversight, achievements, opportunities, challenges, and public perception. The Civil Aviation Authority Botswana (CAAB) serves as the primary regulatory body overseeing aviation activities in the country. While her nation has shown proactive planning for AAM projects, regulatory framework development remains a key area of focus to facilitate the safe integration of innovative aviation technologies.

Botswana has demonstrated significant strides in planning AAM projects, signaling a strong commitment to embracing innovative aviation technologies. The country presents abundant opportunities for collaboration and investment in transportation infrastructure and initiatives, leveraging its conducive environment for testing and development.

Key obstacles include the need for comprehensive regulatory framework development tailored to AAM, readiness of infrastructure to support emerging technologies, and addressing concerns related to public acceptance of UAS drones and electric Vertical Takeoff and Landing aircraft. Public perception towards UAS drones and eVTOL aircraft in Botswana is marked by concerns about privacy infringement, fear of adoption due to safety apprehensions, resistance to change from traditional modes of transportation, and a preference for conventional methods. Botswana's commitment to advancing AAM is evident through its proactive planning and recognition of the opportunities presented by innovative aviation technologies. Addressing regulatory, infrastructure, and public perception challenges will be essential to realizing the full potential of AAM and fostering its sustainable integration into the national airspace.

## ii. France

Frédéric Malleret, President of AeroWest Development, shared a report as liaison to France.



He is a leader who provides business development toward greater Electric AC equipment, Electrical / Hybrid-Electric Propulsion, Flight-critical Electrical Actuation and other various commodities and supplies. Malleret explained that France, along with the UK, Italy and Germany, are at forefront of Advanced Air Mobility, from both platforms and ecosystems: UAS Traffic Management (UTM), energy (electricity and hydrogen) charging perspectives, and infrastructure (vertiports and droneports) and other technologies being developed.

In terms of UTM, the SESAR U-space TindAIR project was coordinated by Innov'ATM and completed by the end of 2022. It involved a series of large-scale demonstrations in Toulouse and Bordeaux, with a focus on strategic U-space deconfliction. Several fully electric and hybrid electric airframes are in development, including Aura Aero, Voltaero, Ascendance Flight, Beyond Aero, Blue Spirit Aero, and Avions Mauboussin.

The Paris Olympic games approaching in July have been seen for years as a perfect occasion to introduce Advanced Air Mobility. Therefore, efforts have been set in motion for its safe, sustainable, and seamless integration in the French capital. However, AAM is facing several hurdles: elusive type certification, lack of infrastructure, restrictive safety and security aspects limited to narrow corridors that may drastically reduce the ambition for this summer. Also, popular polls show that a majority of local citizens do not favor eVTOL operations.

iii. Switzerland

Aurelie Joy Pascaul-Werner, Board Member of the Joint European Drone Association, Drone Industry Association of Switzerland (DIAS), and Senior Regulatory Compliance Manager at Meteomatics outlined the current state of Advanced Air Mobility in Switzerland, the country popularly referred to as “The Silicon Valley of Robotics and Drones.”



Switzerland is highly recognized internationally for its flourishing and rapidly growing startup and industrial ecosystem. In AAM, currently the financing focus is on eVTOL aircraft. It is expected to shift to infrastructure and services to develop the whole ecosystem. DIAS works in close collaboration with the Federal Office of Civil Aviation

Switzerland and seeks to accelerate the acceptance and adoption of these platforms. The country has taken a pragmatic regulatory approach that has led to consistently early and innovative technology solutions.

Challenges includes shifting the financing focus towards a development of the whole ecosystem and not only aircraft; concerns regarding privacy; and fears regarding nuisance, especially noise pollution. Achievements include key decisions to establish a comprehensive legal framework for AAM; the promotion of the development of central components of the U-space system; and the creation of a market for novel aviation applications. Overall, there is a widespread awareness of the potential use cases of UAS and eVTOL aircraft, so the population is generally open to such innovation.

iv. Turkey

Burçin Bilgin, an aviation business development entrepreneur with more than 33 years industry experience, is currently consulting in the Advanced Air Mobility sector. Due to its strategic geographic position, Turkey is home to a number of defense focused companies with enhanced capabilities. Notable among these are Baykar Tech, Titra, and Softtech developing and testing eVTOLs with the use of artificial intelligence. The shift to uncrewed aviation has provided a window of opportunity and the future of air mobility holds promise for transforming transportation. To ensure success, the industry must actively promote the favorable aspect of AAM while also addressing and minimizing any unfavorable ones.



## v. Malawi

Debora Mtambalika, Chief Remote Pilot at Wingcopter, provided observations on the state of



Advanced Air Mobility in Malawi. Debora pointed out that in 2017, UNICEF initiated the first African Humanitarian Drone testing corridor in her country which attracted the global UAS industry. Foreign companies came to test their drone efficiency and effectiveness for agriculture, health, recreation, and other purposes. The African Drone Academy in Malawi has been training students and creating new capacity to grow. This has helped in creating job opportunities in videography, mapping, and delivery of medication into hard-to-reach locations.

UAS technology is limited by harsh weather conditions and most people view drones as a threat that will one day crash on top of their houses. Currently there are no partnerships nor collaborations among local drone startups and foreign companies operating in Malawi to create an interactive platform to share key learnings. Villagers are mostly keen to learn more about AAM technology, operational behaviors, and science behind it. The general perception toward eVTOL aircraft is more upbeat. Many in Malawi believe that it will become a reliable means of transportation for medical emergency deliveries for people living in remote areas.

## vi. Japan

Keisuke Yasukochi, Global Intelligence Officer for SkyDrive, commands a wealth of expertise in business development, particularly eVTOL strategy. In 2025, the



Osaka World Expo will showcase AAM operations by four major OEMs: SkyDrive, Joby, Volocopter, and Vertical Aerospace. In anticipation, Japan released the official version of domestic vertiport guidelines and ConOps. Japan has stringent regulations for general aviation even for test flights and demonstrations, and that stance will likely be applied to eVTOLs too. Public acceptance may still be a challenge as local governments rush to educate the general public about the safety and use cases of AAM.

Driven by national regulator, JCAB, the strategic roadmap for progress through 2030 encompasses 3 key pillars:

- 1) Operations Development will entail conducting demonstrations and flight tests, facilitating the transportation of goods and people, and expanding business operations through the integration of autonomous flights.
- 2) Rules and Regulations Development will clarify existing rules and regulations pertaining to aircraft operations and licensing, Japan can establish effective guidelines for the construction and operation of vertiports.
- 3) Aircraft and Technology Development focuses on continuous innovation and technological progress to enhance safety, extend flight range, reduce noise levels, and enable autonomous operations.

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FORUM TESTIMONIALS

**“I think the Forum is excellent and providing a very relevant global vision for everyone.”**

**“Thank you for the enlightening and informative forum. The opportunity has been truly delightful, and I eagerly anticipate engaging in further discussions. Thank you sincerely to Dan and the entire team for facilitating this productive session.”**

**“Incredible that in a half day, you literally have an overview of AAM across the globe. That is so value-added!”**

**“Wonderful information! It is great to see so much enthusiasm around this topic. Many thanks to AAM Institute for arranging this forum and to all the presenters for sharing information.”**

**“Thank you for organizing this great event, already looking forward to the next one!”**