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INSTITUTE

Bridging Communities,
The Sky Belongs to Everyone.

COVER ARTIST

Sam Payne

John Zhao

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GLOBAL ADVANCED AIR MOBILITY FORUM SUMMARY REPORT

"The Global AAM Forum was an enormous success that brought together key industry insights into the AAM world. No doubt the next instalment of the event will be even bigger."

Darrell Swanson, EA Maven

DMC DESPACHO JURÍDICO

BEL-AIR MACHINING

KEYNOTES

Ed Onwe
Graham Warwick
Supreet "Sue" Kaur
Darrell Swanson
Jason Pritchard
Mariya Tarabanovska

Global AAM Landscape

+ 71 National Updates

+ 15 Special Presentations

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WINTER 2025
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Global Advanced Air Mobility Forum Summary Report

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AMIN VAFADAR

MANAGING EDITOR

OLGA DAVIES

As a participant among diverse stakeholders in AAM sector and related projects, it feels like we're stepping into a completely new era. The changes that AAM bings to the world will transform not only transportation and rural accessibility but also enhance development of safety, regulations, and energies sectors, as all stakeholders collaborate to implement advanced technologies supporting the Future Mobility."

FORUM MODERATORS

GEORGI GEORGIEV

DAVID LEWIN

FAHAD IBNE MASOOD

BOARD OF LIAISONS
LEADERSHIP - WINTER 2025

KATRIN MAYRHOFER

PHILIP BUTTERWORTH-HAYES

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ASSOCIATE EDITORS

GARY VERMAAK

"AAM is already having a positive impact on society by providing isolated rural communities across Africa with access to life saving medicines and vaccines as well as blood and plasma for transfusions, and helping rural clinics in diagnosing diseases and illness faster by transporting blood and other samples quickly and cost effectively to laborities in the nearest city with such facilities."

SARAH NILSSON

"For the past two years, I have been teaching our students at Embry-Riddle Aeronautical University about AAM. It's inspiring to see their reactions to the industry, especially when they realize that the future is now."

COVER ARTISTS

SAM PAYNE

JOHN ZHAO

GLOBAL AAM FORUM WINTER 2025

MODERATOR INSIGHTS

GEORGI GEORGIEV

“THE DEVELOPMENTS WE ARE WITNESSING GLOBALLY REGARDING THE AAMI DESIGN AND IMPLEMENTATION ARE EXCITING AND HIGHLY PROMISING, AND OUR TEAM IS CAPABLE AND READY TO ACTIVELY SUPPORT THESE.
AAM INSTITUTE WILL PROVIDE A MORE PROFOUND UNDERSTANDING OF ALL RELEVANT STAKEHOLDERS' AIMS AND ABILITIES, THROUGH ESTABLISHING ITS SO CALLED INDUSTRY ROUNDTABLE FORMAT GLOBALLY, AND THE CONSEQUENT FORESIGHT ACTIVITIES.”

FAHAD IBNE MASOOD

“FORUM MODERATORS GAAMF 2025 AND THE SERIES OF SESSION AHEAD ARE NOT SIMPLY ABOUT TECHNOLOGICAL ADVANCEMENTS; IT'S ABOUT ESTABLISHING THE FOUNDATIONAL POLICIES, STRATEGIC-LEVEL THOUGHT PROCESS AS WELL AS INFRASTRUCTURE THAT WILL INTEGRATE AAM INTO OUR GLOBAL MULTIMODAL TRANSPORTATION ECOSYSTEMS. WE ARE HERE TO CRAFT THE STRATEGIC FRAMEWORKS THAT ENSURE SAFE, SUSTAINABLE, AND EQUITABLE ACCESS TO THE SKIES FOR GENERATIONS TO COME.”

DAVID LEWIN

“IT WAS TRULY AN HONOR TO MODERATE FOR THE GLOBAL ADVANCE OR MOBILITY FORUM. I WAS IMPRESSED WITH THE PASSION FROM EVERY LIAISON REPRESENTING COUNTRIES FROM ACROSS THE GLOBE WHO ARE COMMITTED TO ADVANCING UAS AND EVTOL APPLICATIONS. IT IS A REALLY EXCITING TIME TO BE IN THIS INDUSTRY WITH SO MUCH MORE TO COME.”

ARTIST
Sam Payne
John Zhao
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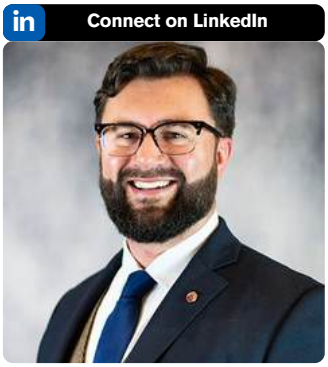
PRESIDENTIAL LETTER

Advanced Air Mobility Institute



The year 2025 will prove to be a critical inflection point in the history of advanced air mobility. While financial challenges are impacting a growing list of manufacturers, we must not forget that consolidation and creative destruction are natural elements of any new industry. And for naysayers that are quick to jump online to claim the upper hand in predicting the downfall of a given OEM, please be careful not to lose sight of that fact that real people's lives and livelihood are impacted. No one needs to mourn the loss of a company or corporation but we should still empathize with the brilliant engineers and developers that are caught in the crossfire of insolvency.

To make electric aviation a reality we're going to need an awful lot of new, and energetic talent for a robust ecosystem. Our intent is to attract a workforce that genuinely cares about community growth and accessibility. Zero-emission air transportation is the means; improving humanity's quality of life is the goal.

I am continually amazed at the selfless team we've built at the AAM Institute. In recognition of his tremendous efforts, we recently promoted Amin to become our first Executive Director. The Global AAM Forum semi-annual series is perhaps the most visible program where we benefit from the shear breadth of work our volunteers put forth. I believe that bringing together industry professionals from around the world for an ongoing virtual conference series like this creates real value. We want to share best practices, how to replicate wins, how to avoid losses, important matters to consider when expanding to new markets, and which use cases to prioritize to achieve public acceptance. Thank you for taking the time to review this report.

All the Best,
Dan

DC Sloat

Daniel C. Sloat
Founder & President

"TO EDUCATE AND ADVOCATE FOR THE BROADEST PUBLIC BENEFIT THROUGH THE AVIATION ECOSYSTEM GLOBALLY"

MESSAGE FROM THE EMCEE

Advanced Air Mobility Institute

The Global Advanced Air Mobility Forum 2025 has once again highlighted that AAM is not a distant dream but an imminent reality poised to redefine global transportation. As I step into my new role as Executive Director of the Advanced Air Mobility Institute, I am both humbled by our achievements and energized by the challenges ahead.

Our discussions over these transformative days have underscored that our future will be defined not solely by technological breakthroughs, but by a united, global community working to overcome regulatory, infrastructural, and public engagement challenges. Robust, harmonized regulations are essential for ensuring that AAM operations are safe and seamless across borders. Equally important is earning public trust by demonstrating that these innovations can enhance safety, reduce environmental impact, and improve quality of life for all communities. Infrastructure development remains a cornerstone of our progress. We must forge partnerships with urban planners, government bodies, and private investors to create the vertiports, charging stations, and digital airspace management systems necessary for large-scale AAM operations. With a coordinated effort, our cities and rural areas alike can be transformed into hubs of connectivity and opportunity. The forum has also reinforced the importance of international collaboration. No single nation or company can drive this revolution alone. We must break down silos and form cross-border alliances to share best practices, align standards, and accelerate progress. This collective effort will ensure that AAM not only meets the needs of today but also lays the groundwork for a more connected, inclusive, and sustainable future.

At this pivotal juncture, our responsibility is clear. We must advocate for policies that support safety and sustainability while fostering innovation. We must educate our communities, nurture a diverse workforce, and ensure that the benefits of AAM are shared widely, from metropolitan centers to underserved regions.

I am proud to be part of a dynamic leadership team dedicated to guiding the AAM sector into its next chapter. Let us continue to work together—industry pioneers, regulators, researchers, and community leaders—to transform our shared vision into a thriving reality.

Sincerely,

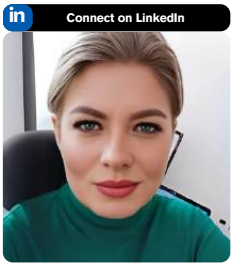
Amin Vafadar
Executive Director

"TRUE FELLOWSHIP AMONG MEN MUST BE BASED UPON A CONCERN THAT IS UNIVERSAL, IT IS NOT THE PRIVATE INTEREST OF THE INDIVIDUAL THAT CREATES A LASTING FELLOWSHIP AMONG MEN, BUT INSTEAD THE GOALS OF HUMANITY"

I CHING (BOOK OF CHANGES, CIRCA 1000 B.C.)

BOARD OF LIAISONS ADDRESS

LEADERSHIP TEAM S24 - W25



CHAIR: **KATRIN MAYRHOFER | ROMANIA**

As my tenure as Chair of the Board of Liaisons at the Advanced Air Mobility Institute concludes, I want to express my deepest gratitude to everyone who has contributed to our success. It has been an honor to serve alongside such a dedicated and visionary team. Together, we have made significant strides in advancing air mobility, fostering international collaboration, and promoting sustainable and inclusive solutions.

A special thank you to my colleagues at the Institute for your unwavering support. Your expertise and creativity have positioned the Institute as a global leader in advanced air mobility. I am incredibly proud of what we've accomplished and confident the foundation we've built will inspire progress for years to come.

To my successor, I offer my heartfelt congratulations and full support. The Institute's future is bright, and I have no doubt you will lead it to greater heights. I look forward to seeing you build on our work and drive innovation. Although I'm stepping down, my commitment to the Institute's mission remains strong. I will continue to support it through collaboration, advocacy, and mentorship.

Thank you to the entire team at the Institute for your trust, collaboration, and friendship. It has been a privilege to serve as your Chair, and I am deeply grateful for the opportunity to be part of this extraordinary community.

PHILIP BUTTERWORTH-HAYES | UNITED KINGDOM

"The Board of Liaisons has a unique role to play in the global AAM industry, providing intelligence on national markets and creating a bank of market information on global AAM developments which is unrivalled in its depth and breadth"

ROSE FUNJA | TANZANIA

"Innovation, collaboration, and impact—GAAMF Winter 2025 proved that the sky is not the limit but just the beginning."

FERNANDA DE MELO SINISCALCHI | BRAZIL

"Aligned with the Call to Action from ICAO's AAM Symposium, the Forum plays a crucial role in AAM integration, addressing each country's landscape and needs."

GAAMF
WINTER
2025

EXECUTIVE SUMMARY

The Global Advanced Air Mobility (AAM) Forum Winter 2025 report encapsulates the rapid evolution of an industry poised to redefine global transportation. Drawing insights from 74 countries, the report highlights the sector's significant advancements, emerging challenges, and the opportunities that lie ahead as AAM moves from concept to widespread implementation.

***Key Discussions and Insights*:**

- **Technological Progress and Use Case Priorities:** Innovations in electric Vertical Takeoff and Landing (eVTOL) aircraft, drones, and associated infrastructure have propelled AAM into the spotlight. The report underscores that life-saving applications—particularly Public Safety/Emergency Response and Air Medical Transport—continue to dominate industry priorities, with a growing emphasis on Agriculture Services and Cargo Delivery. These applications not only demonstrate immediate societal benefits but also illustrate how AAM can address diverse needs, from improving disaster response times to enhancing logistical efficiency in remote regions.
- **Regulatory and Public Engagement Challenges:** A recurring theme is the necessity for robust regulatory frameworks to ensure the safe and seamless integration of AAM operations across borders. While technological breakthroughs are impressive, the report stresses that harmonized policies and streamlined certification processes are essential to overcome current regulatory bottlenecks. Concurrently, public sentiment remains a critical factor. Despite a generally positive outlook—with increasing awareness and optimism—there remains a need to address safety concerns and enhance public understanding. Effective communication and targeted outreach are vital for building the trust required to drive broader adoption.
- **SWOT Analysis and Driving Factors:** The comprehensive SWOT analysis reveals that AAM's strengths lie in its ability to improve connectivity, provide rapid emergency responses, and reduce carbon emissions—thereby contributing to both economic growth and environmental sustainability. However, weaknesses such as integration challenges with existing air traffic systems, high infrastructure costs, and technological dependencies (notably in battery performance) pose significant hurdles. Opportunities abound in the realms of urban and regional mobility, job creation, and eco-friendly tourism, while threats such as operational safety risks, cybersecurity concerns, and political and financial instability demand proactive mitigation strategies.
- **Market Viability and Socioeconomic Impact:** Survey data indicates a strong consensus that viable AAM operations could emerge within 2–10 years, with a substantial portion of early adopters projected in the 2–5 year range. The economic potential is underscored by the significant GDP and population figures of early-adopting regions, highlighting a massive market opportunity. By combining financial support, regulatory innovation, and targeted investments in infrastructure and workforce development, stakeholders can unlock the full potential of AAM, driving both regional connectivity and broader socioeconomic benefits.

The GAAMF Winter 2025 report paints a picture of an industry on the brink of transformation. As technological innovation converges with evolving regulatory landscapes and heightened public engagement, AAM is set to become a cornerstone of next-generation transportation. Achieving this vision will require collaborative efforts across governments, industry players, and communities to create a safe, sustainable, and inclusive ecosystem. The insights provided in this report offer a strategic roadmap for navigating the complexities ahead and for realizing the immense potential of advanced air mobility worldwide.

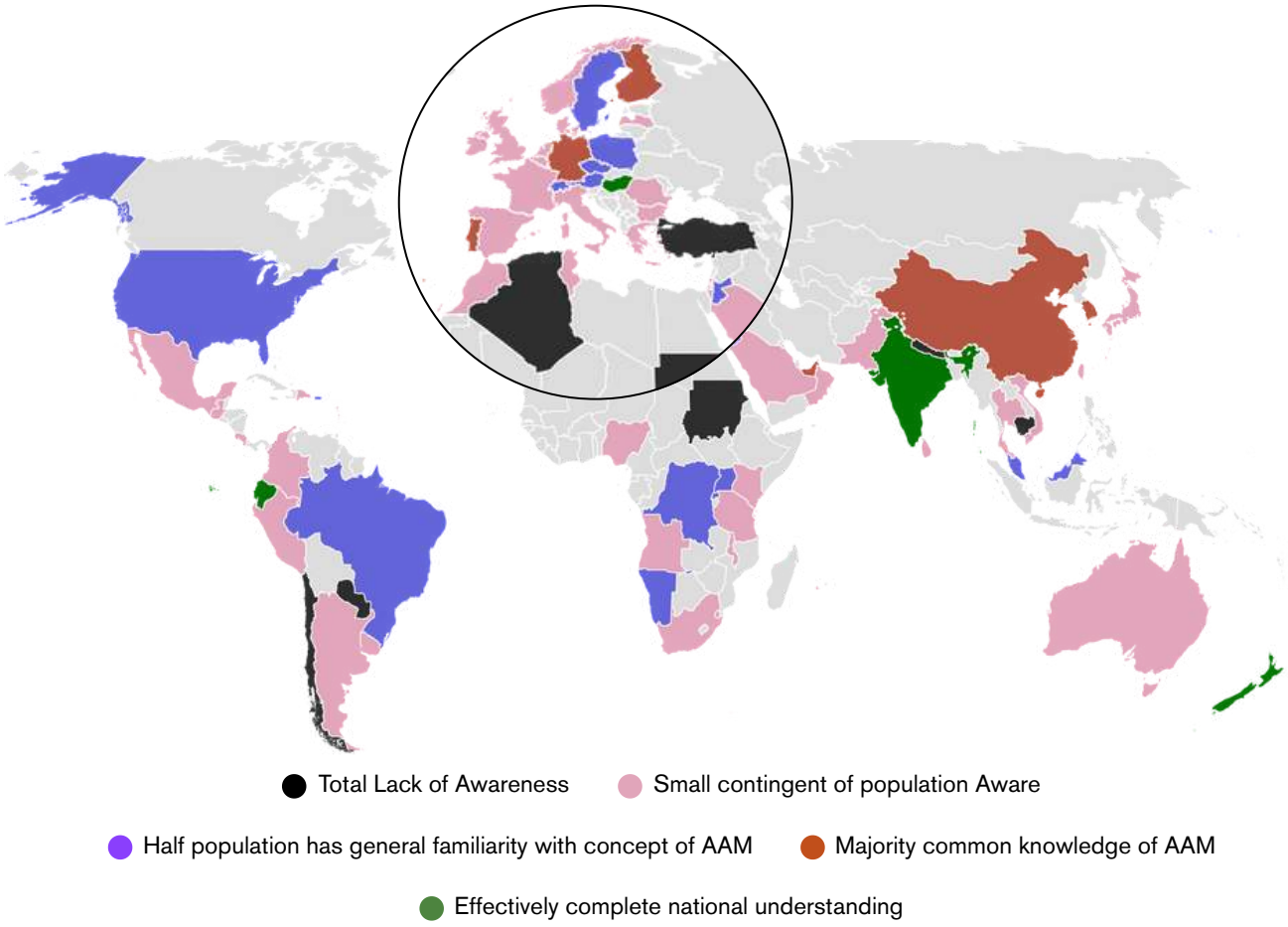
GAAMF
WINTER
2025

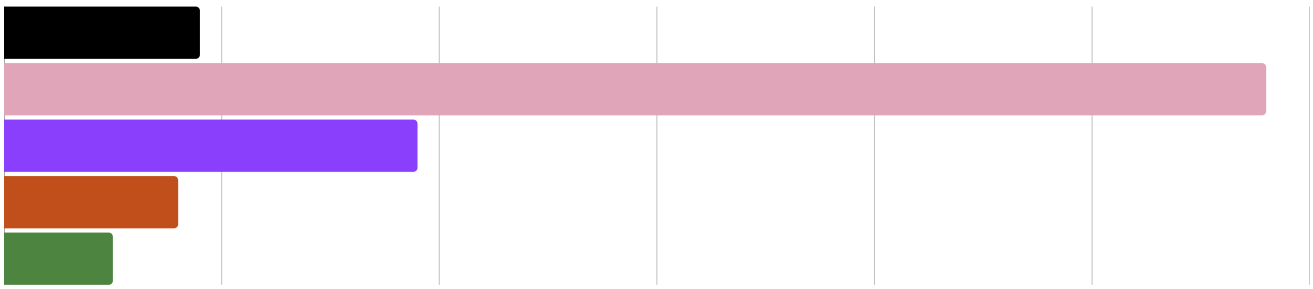
AAM LANDSCAPE

PUBLIC AWARENESS & SENTIMENT

PUBLIC AWARENESS OF AAM

Across the surveyed countries, most reports indicate that only a relatively small portion of their population has any knowledge of Advanced Air Mobility (AAM). In many cases, awareness is confined to specialized or tech-savvy circles, with only a few nations highlighting a more widespread understanding. An even smaller handful of respondents suggest that AAM is almost universally recognized, reflecting particularly robust public outreach or existing aerospace engagement in those regions. Overall, this distribution underscores a clear need for broader education and communication efforts to bridge knowledge gaps and foster greater public familiarity with AAM.

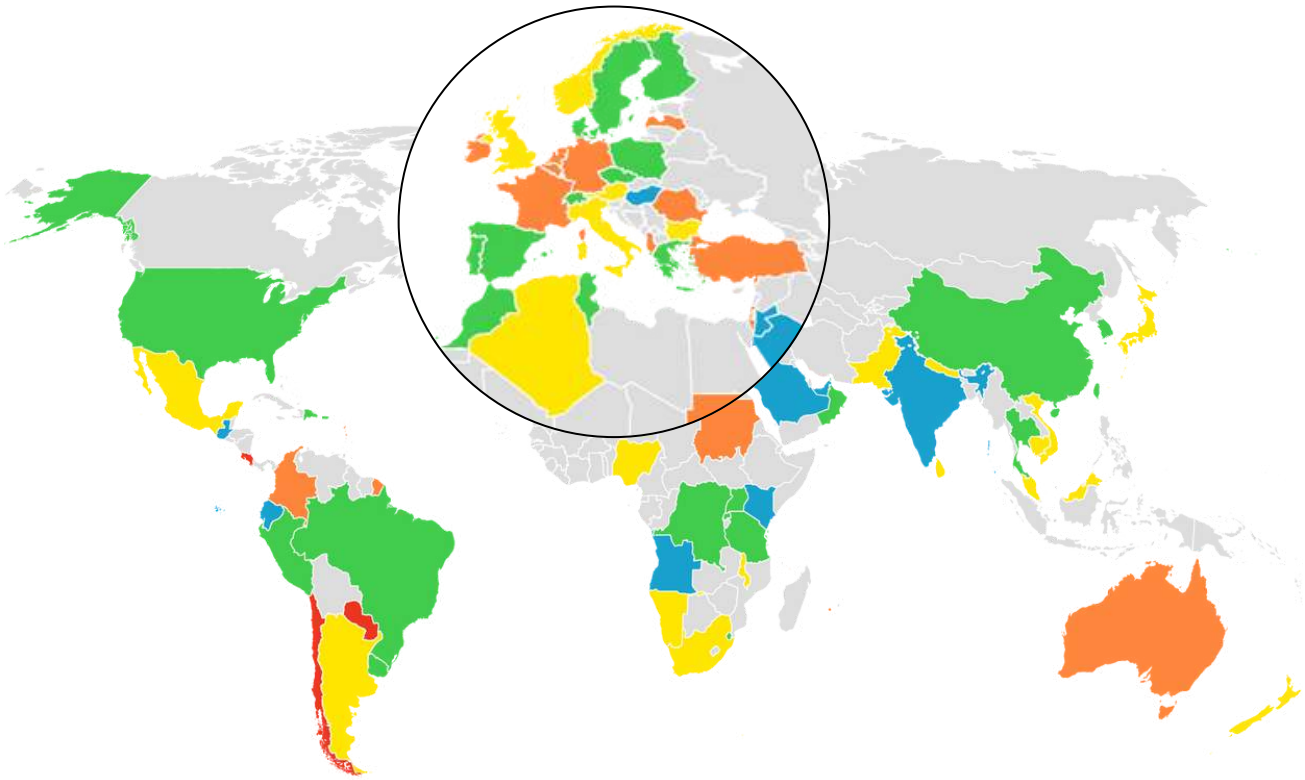


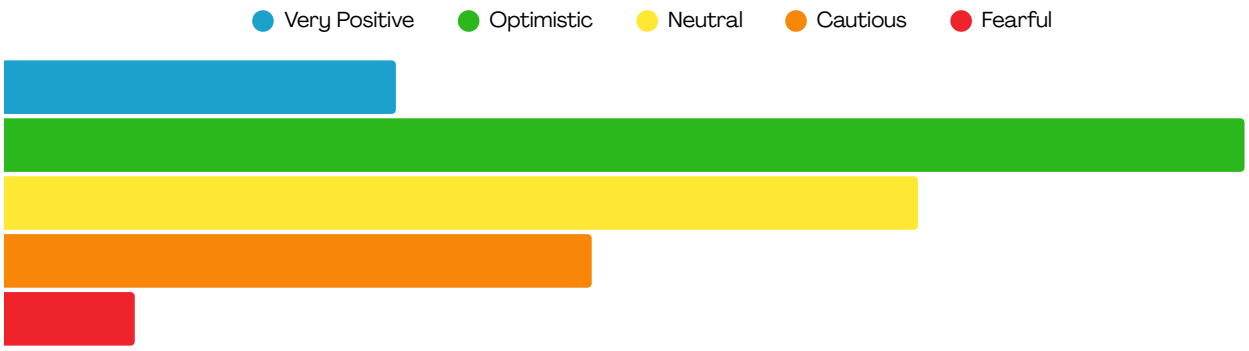


Public Awareness

PUBLIC SENTIMENT TOWARD AAM

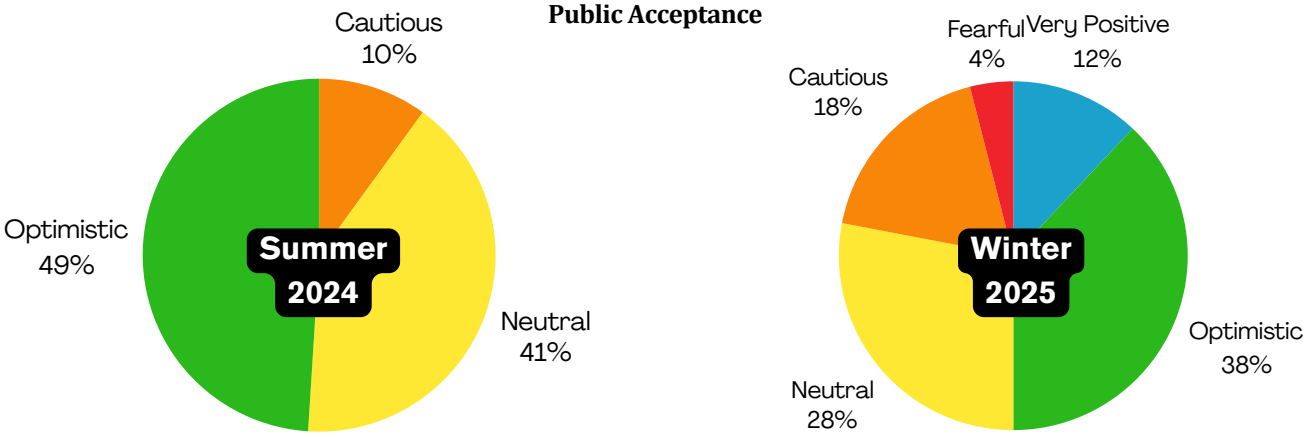
Responses to this year's survey indicate a predominantly positive or hopeful attitude toward AAM in many countries, with the majority of liaisons characterizing public sentiment as either "Optimistic" or "Very Positive." A sizable number report "Neutral" feelings, which can suggest limited awareness rather than a strong stance for or against. There is, however, a noteworthy group described as "Cautious," reflecting unresolved concerns about safety, cost, or regulatory factors. Only a small fraction of respondents cite a "Fearful" outlook, highlighting deeper apprehensions. Overall, this distribution points to a generally constructive global mood about AAM, punctuated by pockets of uncertainty that may be addressed through targeted outreach and education.





Public Sentiment

Public Acceptance



Positive Sentiment Splits into Two Categories: In 2025, "Optimistic" attitudes effectively remain high, but part of this group now falls under "Very Positive," offering a more nuanced picture of enthusiastic support. Combined, these two categories total 50%, roughly in line with or slightly above last year's 49% "Optimistic" alone. Notable arrivals from Neutral to Optimistic include the US, Brazil, Paraguay, Democratic Republic of Congo, Portugal, and Greece. Meanwhile, the UK, Argentina, and Cambodia now report Neutral instead of Optimistic. The Middle East and India are very compelling markets to enter as public acceptance seems to have the highest chance of success at this stage.

Neutral Responses Net Decrease: The 2025 survey shows fewer neutral responses—28% compared to 41% previously—suggesting growing awareness or firmer opinions (toward doubt) as people learn more about AAM. Notable departures from Neutral to Cautious include France, Netherlands, Ireland, and Australia. On the other hand, Malawi and Austria now report Neutral instead of Cautious.

Rise in Cautious Views: Cautious sentiment increases from 10% to 18%, possibly reflecting heightened public scrutiny about potential safety challenges, cost, or regulatory hurdles, particularly as more countries become aware of AAM's potential. With the insolvency challenges faced by eVTOL OEMs Lilium and Volocopter, it came as no surprise that Germany remains Cautious.

Introduction of a "Fearful" Category: Although small at 4%, this category captures the more negative or apprehensive outlook—something not captured in the 2024 data. Because this category was not an option prior to this report it could be that such sentiment existed previously but reported as Cautious. Paraguay and Chile shifted from Neutral to Fearful and Colombia still reports as Cautious so parts of South America may need additional care when expanding into these markets. The emergence of this category underlines the need for clear communication and education to address misconceptions.

Public Opinion Uniformity: Responses suggest that public opinion about AAM, where it exists, can be highly fragmented. Nearly a third of Liaisons report that everyone who is aware of AAM tends to agree on its benefits. However, in many other countries, sentiment is divided by socio-economic or cultural lines. A significant number point to economic disparities as the primary source of disagreement, while others note splits between rural and urban populations. Still others describe a strong minority opposition or an even split in viewpoints. Overall, these findings imply that even within countries with a shared basic awareness of AAM, acceptance is not monolithic and may hinge on factors such as income levels, access to services, or differing community priorities.

USECASE ANALYSIS

This year's data set comprises responses from 74 countries, a significant increase from last year's 48 countries. The broader geographic reach captures more diverse perspectives on Advanced Air Mobility (AAM) priorities and reflects a growing global interest in AAM solutions.

USE CASES RANKED BY BROADEST PUBLIC BENEFIT (W2025)

1. **EMERGENCY RESPONSE**
2. **AIR MEDICAL TRANSPORT**
3. **AGRICULTURE SERVICES**
4. **CARGO DELIVERY**
5. **SECURITY SURVEILLANCE**
6. **MILITARY & DEFENSE**
7. **INFRASTRUCTURE INSPECTION**
8. ***TOURISM SIGHTSEEING**
9. **AIR TAXI SERVICES**

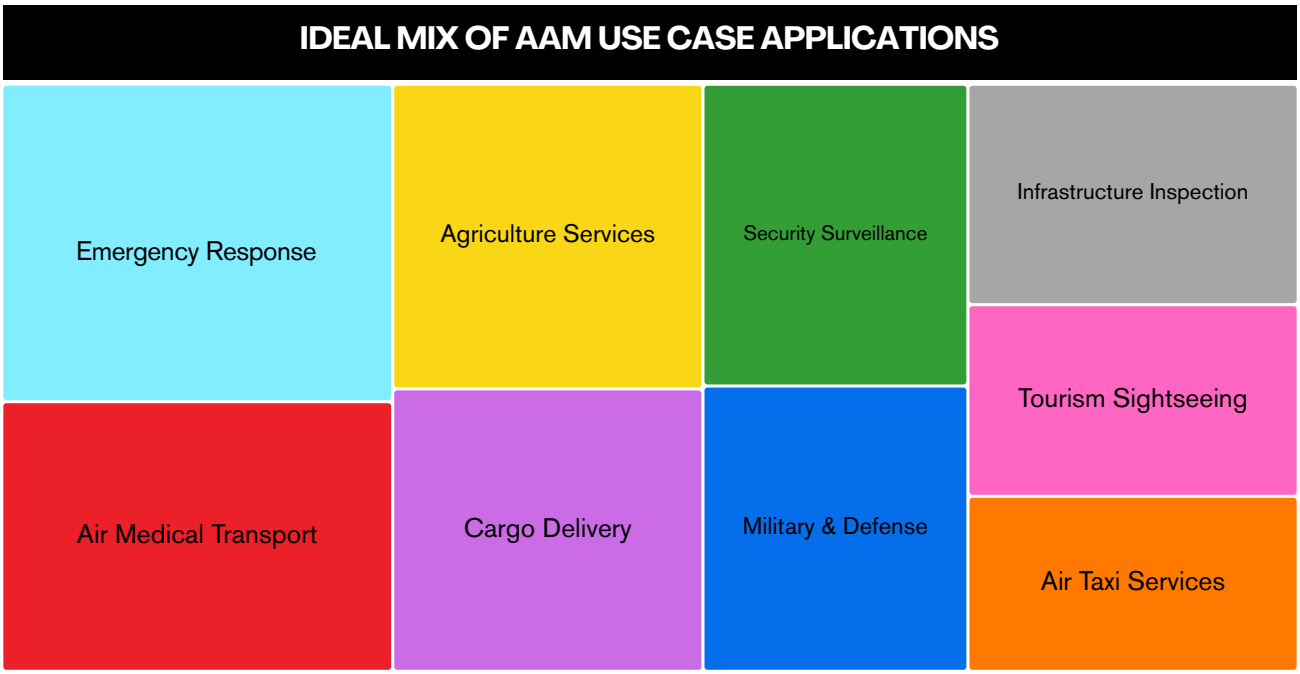
COMPARING LAST YEAR'S FINDINGS TO THIS YEAR

The year-over-year comparison reaffirms that **public safety life-saving missions—i.e. Emergency Response and Air Medical Transport—consistently dominate global AAM priorities, indicating strong consensus on their immediate societal value.** Even with a nearly 50% increase in country participants (from 48 to 74), these top applications held or even improved their rankings, underscoring their universal and critical role in shaping positive perceptions of AAM. Meanwhile, other use cases like Cargo Delivery and Agriculture Services gained moderate support, demonstrating tangible benefits but remaining below public safety applications. **Newly introduced this year, Tourism Sightseeing sparked interest as a way to familiarize communities with AAM**. Lastly, Air Taxi Services remain at the lower end of the rankings despite significant investment, reflecting ongoing concerns over cost, infrastructure, and public acceptance.

2024 RANKING

USE CASES RANKED BY BROADEST PUBLIC BENEFIT

1. EMERGENCY RESPONSE
2. AIR MEDICAL TRANSPORT
3. AGRICULTURE SERVICES
4. CARGO DELIVERY
5. SECURITY SURVEILLANCE
6. INFRASTRUCTURE INSPECTION
7. MILITARY & DEFENSE
8. AIR TAXI SERVICES



Emergency Response Continues to Dominate (#1): As in last year's report, the use of AAM for emergency response and life-saving missions remains the clear global favorite. Liaisons frequently cite its **high-impact, high-visibility role**—ranging from disaster relief to rapid first-responder deployment—as a key driver for **early adoption and broader public acceptance of AAM**. Last year, 37% of liaisons (out of 48 countries) identified Public Safety/Emergency as the single most important application; this year, with respondents from 74 countries, that figure climbed to **over 42%**, **reinforcing the consensus that prioritizing public safety delivers immediate societal benefits while fostering trust in AAM technology.**

Air Medical Transport Holds a Strong Second (#2): As in previous analyses, air medical services—ranging from rapid patient retrieval and organ transport to distributing vaccines in remote areas—continue to rate highly in terms of **broad societal impact**. Most Liaisons view medical applications as a logical extension of public safety missions, especially for **bridging healthcare gaps in remote or underserved regions**. Last year, nearly 70% of Liaisons placed Air Medical Transport among their top three priorities; this year, **57% of respondents across** 74 countries did the same. While the percentage is lower, the overall pool of participants has grown considerably, indicating that absolute support for air medical services remains robust even as the survey base expands.

Agriculture Services Rises in Importance (#3): With the expanded survey pool, interest in agricultural applications has grown markedly. Last year's responses were somewhat polarized—11.6% ranked Agriculture Services as their highest priority while 9.3% considered it their lowest. This year, however, **49% of respondents** from 74 countries placed it among their top three priorities. Such a jump suggests that precision agriculture, crop spraying, and monitoring resonate strongly not only in traditionally **agricultural economies** but also in nations exploring **sustainable farming practices.** The high ranking underscores widespread recognition that **AAM can bolster food security**, **cut operational costs, and minimize environmental impact**.

Cargo Delivery Stabilizes Mid-Range (#4): Demand for rapid, reliable transport of goods—particularly in remote or hard-to-reach locations—continues to position cargo delivery as **a solid mid-level priority**. Last year's survey classified it definitively as a mid-range application, with more than twice as many "#5" rankings as any other category—and notably, no country ranked it as their lowest priority. This year, **67% of respondents across 74 countries placed cargo delivery among their top four use cases.** While not as universally top-ranked as public safety or medical transport, the logistical promise of small UAS and xXTOL aircrafts continue to garner steady support.

Security Surveillance (#5): Compared to last year, these applications remain **mid-tier** in terms of broad public benefit. Liaisons often cited concerns around privacy, civil liberties with respect to surveillance. Security is important for both protection of assets, as well personal security.

Military & Defense (#6): Compared to last year, these applications moved up a rank but remain **mid-tier** in terms of broad public benefit. and the perception that purely defensive or policing use of drones could draw mixed reactions from local communities. Even so, this has a stable foothold, reflecting that many governments see national security interests as integral to AAM development, as evidenced by recent initiatives to investigate the use of (hybrid) electric, both crewed and uncrewed.

Infrastructure Inspection (#7): Although vital for maintenance and public safety, infrastructure inspection has typically been overshadowed by more immediate life-saving or widely impactful missions. Still, the even distribution of scores reported last year seems to persist, **indicating consistent yet not dominant** interest in this area.

Tourism Sightseeing Emerges (#8): Newly introduced in this year's survey, tourism sightseeing by air garnered moderate but promising support. Many Liaisons view it as an accessible, experience-oriented entry point for communities to become familiar with AAM technology. While not a top-tier priority in terms of immediate societal impact, **it could play a pivotal role in building public awareness** and support for broader AAM applications over time, especially given the annoyance factor of loud and polluting helicopters circling low along waterfronts and tourist attractions.

Air Taxi Services Rounds out List (#9): Despite commanding a great deal of private investment and media attention, air taxi services again receive the lowest ranking in terms of broad public benefit. Last year, 48.8% of Liaisons regarded it as the least important use case; this year, **over 65% ranked it among their bottom three choices**. Concerns include high ticket costs, regulatory hurdles, and potential noise or visual pollution —factors that currently **limit accessibility to wealthier early adopters.** Nevertheless, many stakeholders maintain that air taxis could **rise in importance over time**, especially as operating costs come down, infrastructure matures, and the broader public becomes more comfortable with AAM technology.

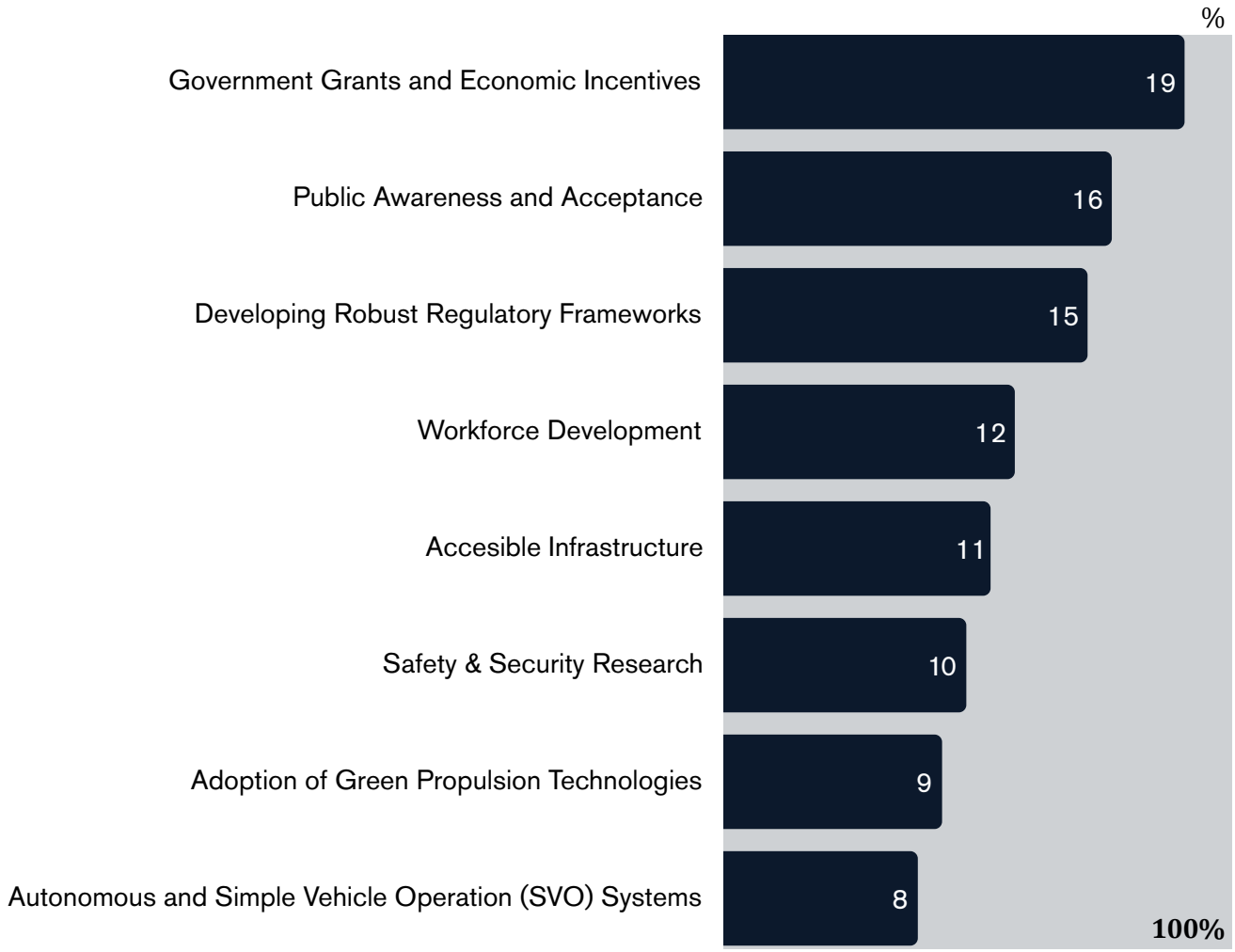
- This year's data set comprises responses from 74 countries, a significant increase from last year's 48 countries. The broader geographic reach captures more diverse perspectives on Advanced Air Mobility (AAM) priorities and reflects a growing global interest in AAM solutions.
- As before, Liaisons were asked to order AAM use cases in terms of the number of people who stand to benefit, from highest to lowest. This year's ranking was derived using the Borda count method, ensuring that each Liaison's complete ordering influenced the final composite.
- Shifts in position or percentage do not necessarily indicate diminished interest. it is simply a function of a much larger overall pool of responses.

AAM VIABILITY

The current survey from 74 countries highlights a diversified set of factors propelling the AAM ecosystem forward. While last year's analysis underscored the importance of legislative changes, public acceptance, and economic growth—with public acceptance and regulatory frameworks taking center stage—this year's findings offer a more nuanced picture. Each of these factors represents a crucial pillar in the progression of the AAM ecosystem, with total share in % contributing to the system as a whole.

FACTORS DRIVING PROGRESS IN AAM ECOSYSTEM

A multifaceted approach that combines enhanced financial support, robust regulatory reforms, comprehensive public outreach, and targeted investments in technology and workforce development is essential. By addressing these areas concurrently, stakeholders can create a more conducive environment for the successful integration and scaling of AAM, ultimately accelerating its maturation and maximizing its societal benefits.



Government Grants and Economic Incentives (19%): Financial support and targeted economic policies are recognized as the top catalyst. This reflects a belief that early-stage investments and subsidies are essential to mitigate high upfront costs and stimulate both public and private sector participation. Increase funding programs, introduce tax incentives, and create public–private partnerships to accelerate pilot projects and infrastructure rollouts.

Public Awareness and Acceptance (16%): A strong emphasis on public perception suggests that widespread understanding and acceptance of AAM are vital. Clear communication can build trust and demystify new technologies. Launch comprehensive education and outreach initiatives—through media campaigns, public demonstrations, and community engagement events—to boost understanding and reduce misconceptions.

Developing Robust Regulatory Frameworks (15%): Establishing clear, supportive regulations is seen as essential for safe and efficient AAM operations. Policymakers need to address airspace management, certification standards, and operational protocols. Streamline regulatory processes, encourage international collaboration to harmonize standards, and engage industry experts to craft adaptive policies that keep pace with technological advances.

Workforce Development (12%): A skilled workforce is necessary to support the emerging AAM ecosystem —from pilots and technicians to engineers and support staff. Invest in specialized training programs, update educational curricula in relevant fields, and promote partnerships between academia, industry, and government to build a pipeline of qualified professionals.

Accessible Infrastructure (11%): The availability of supportive physical infrastructure—such as accessibility for people with disabilities, landing sites, maintenance facilities, and charging stations—is crucial for operational success. Prioritize infrastructure planning at local and national levels, incentivize private investment in infrastructure projects, and integrate AAM requirements into urban planning initiatives.

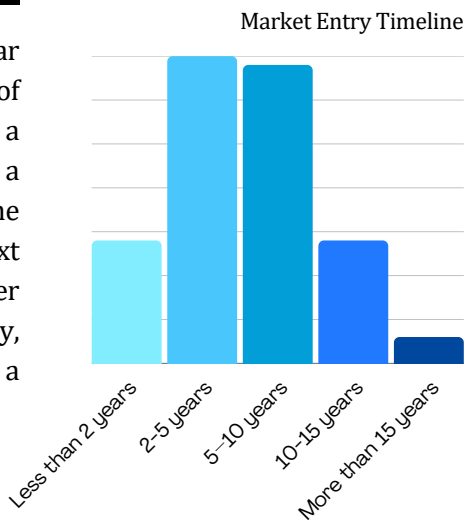
Safety & Security Research (10%): Ensuring operational safety and addressing cybersecurity risks remain key for gaining public and regulatory trust. Increase funding for R&D in collision avoidance, cybersecurity, and risk management, and foster collaborations between regulatory bodies, industry, and research institutions to implement best practices.

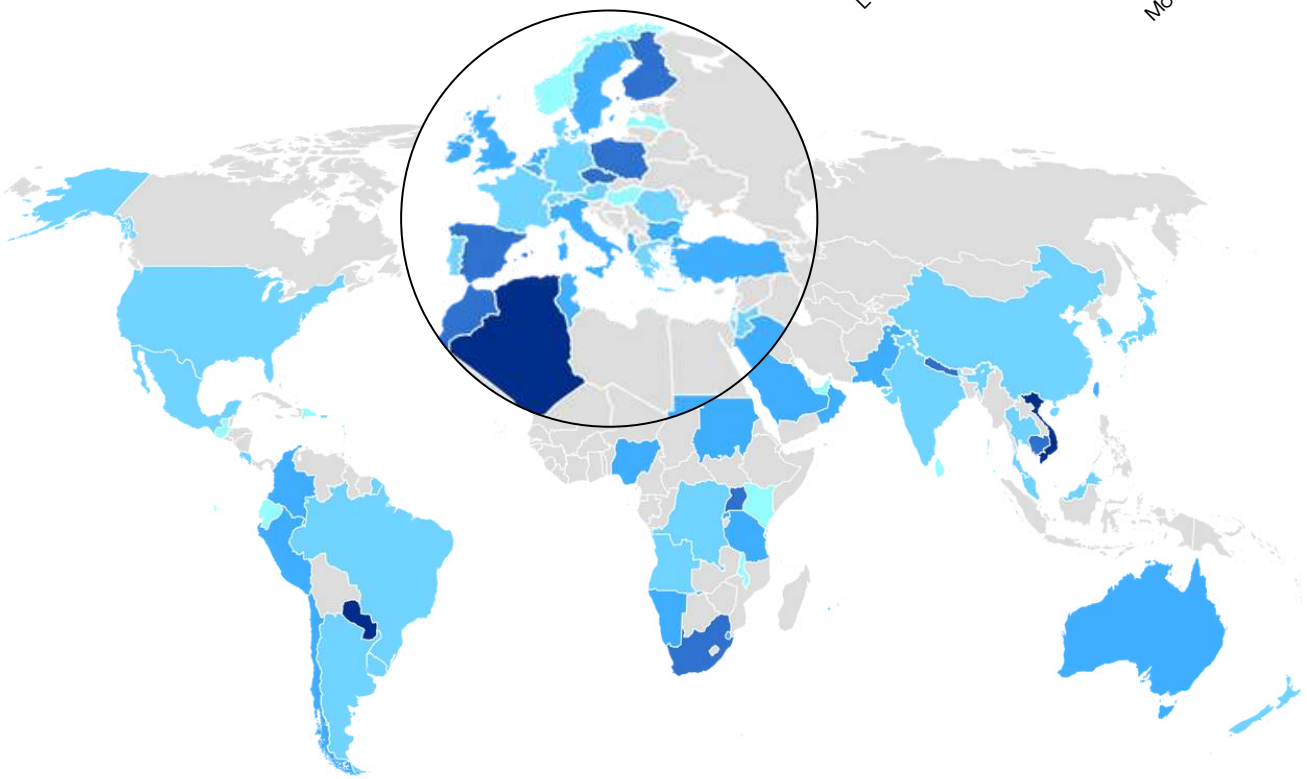
Adoption of Green Propulsion Technologies (9%): Environmental considerations are increasingly important, with a focus on sustainable and eco-friendly propulsion methods. Support R&D in alternative energy and green technologies through grants and incentives, and promote policies that encourage the adoption of cleaner propulsion systems across the industry.

Autonomous and Simple Vehicle Operation (SVO) Systems (8%): Advances in automation and simplified operation are viewed as key to reducing operational complexity and improving safety. Accelerate research into autonomous systems and greater levels of automation in the cockpits to assist pilots, invest in pilot programs to test these technologies in real-world conditions, and establish clear regulatory guidelines for autonomous operations.

VIABILITY PROJECTION

The survey responses reveal a clear clustering around a 2–10 year horizon for viable AAM entry into service. Approximately 35% of respondents expect AAM to be operational within 2–5 years, while a nearly equal 34% foresee viability within 5–10 years. This indicates a strong overall belief that, with the right conditions, AAM could become a functional part of national transportation ecosystems within the next decade. smaller segment (14%) is optimistic about an even quicker rollout, anticipating viable service in less than 2 years. Conversely, another 14% believe the timeline could extend to 10–15 years, and a very limited group (3%) thinks it may take more than 15 years.





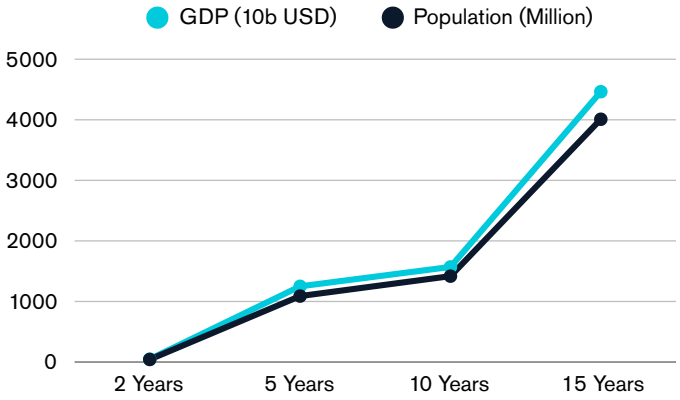
Concentration in the 2–10 Year Range: The majority view suggests moderate optimism, likely driven by anticipated advancements in technology, evolving regulatory frameworks, and increasing investments in infrastructure.

Variability in Expectations: The divergence in opinions—ranging from less than 2 years to over 15 years—reflects differing national contexts, with some countries potentially facing greater regulatory, infrastructural, or market challenges.

Implications for Stakeholders: The broad consensus within a 2–10 year window highlights the need for accelerated efforts in policy development, public engagement, and technological refinement to meet these expectations and capitalize on market readiness.

SOCIO-ECONOMIC IMPACT

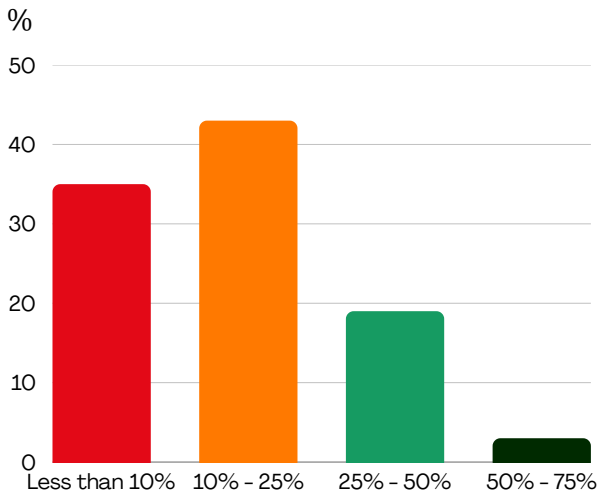
This analysis combines the survey insights for the combined 74 countries surveyed on projected AAM timelines with cumulated estimated socioeconomic impacts, based on combined GDP and population. to determine the potential target market during the early maturity stage. In essence, liaisons were asked both when AAM will achieve viable entry into service and what percentage of their national population would engage with these services at that early stage. By applying these percentages to macroeconomic indicators, we can gauge the size and economic potential of early adopters, which would an important consideration for stakeholders and the future investors in accessing market potential for aircraft, infrastructure developers and operators.



Early Maturity Stage Cumulative Target Population with their GDP

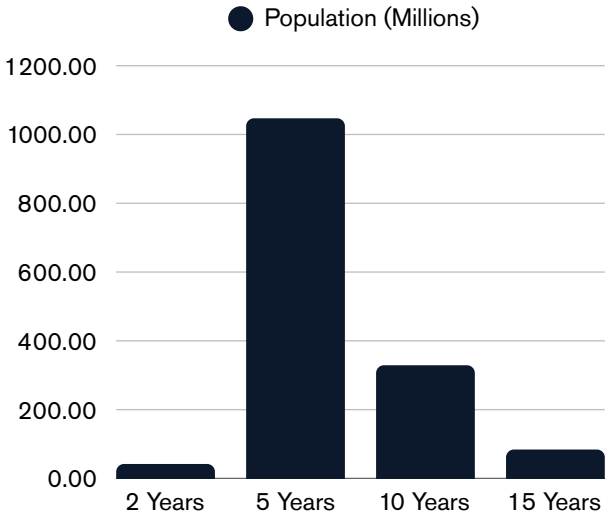
Liaisons also provided estimates of the portion of the national population that could be impacted in the early stage:

- A significant share of countries expects between 10–25% of their population to engage, directly and indirectly with a wide range of AAM service, in their daily lives.
- Fewer countries predict very high early engagement (25–50% or more), indicating that initial uptake may be concentrated among early adopters and urban markets before broader penetration occurs. One should also not forget the positive impact medical drone deliveries are having on healthcare in poorer isolated rural communities in under developed countries included in this report.



Early Maturity Stage Target Population in surveyed countries

Cumulative Impact Over Time: The survey results indicate a progressive adoption timeline. For instance, while some countries expect viable service in less than 2 years, the "up to 5 years" horizon—combining responses for "less than 2 years" and "2–5 years"—is particularly significant. Based on research, countries in this group collectively represent a market with a combined GDP of approximately $12.5 trillion and a population of about 1.09 billion. This cumulative approach recognizes that early adopters national markets will expand over time, so a nation reporting 20% engagement in the "less than 2 years" category is likely to see even higher overall % engagement by the 5-year mark, as adoption increases over time.



Early Maturity Stage Target Population in surveyed countries

Significant Opportunities in the Next 5 Years

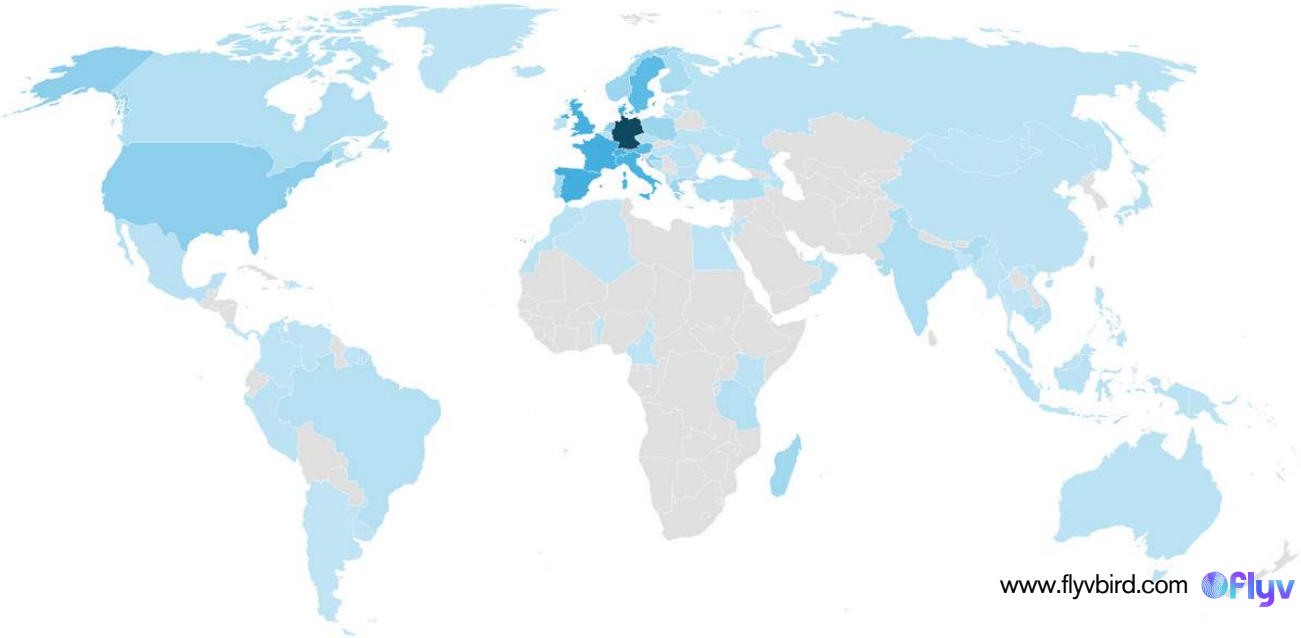
The combined data emphasize that the next 5 years represent a critical window for market entry. With the early maturity stage already projected to engage a substantial percentage of the population and contribute significantly to national GDP figures (cumulatively reaching engagement with over $12.5 trillion and more than 1.09 billion people), stakeholders have a large, economically impactful target market.

This is especially pertinent for regions where the projected target market size (adjusted by the liaisons' percentages) indicates not only a significant consumer base but also robust economic activity. Such insights can guide investment, regulatory alignment, and technology development strategies to maximize early AAM adoption. Improvement Strategies for Maximizing Socioeconomic Impact:

- **Focused Rollout Initiatives:** Given the substantial economic capacity within the "up to 5 years" segment, stakeholders should prioritize pilot projects, localized demonstrations, and partnerships with local governments to accelerate adoption.
- **Tailored Market Engagement:** By understanding that early engagement percentages are conservative and likely to grow over time, market strategies should target not only the initial 10–25% segment but also plan for subsequent waves of adoption as public familiarity and infrastructure improve.
- **Data-Driven Investment:** The significant GDP and population figures in early adopting regions offer a compelling business case. Developers and OEMs can leverage these insights to secure investments, align R&D efforts, and design solutions that cater to the specific needs of these markets.
- Focus on providing services to those communities that can befit most from better services, like rural communities from Alaska to Patagonia and Africa to Andes, who will benefit most from AAM.

Next-Generation Scalable Air Mobility

Flyv Bird's recent data offers a compelling snapshot of emerging market demand. With expressions of interest from over 920 cities across 120+ countries in 2024, the data clearly signals that travelers worldwide are hungry for smarter, faster, and more direct flight options. Over 6,500 flight searches on their platform underscore the growing appetite for innovative air mobility solutions—one that promises not only enhanced speed and flexibility but also the potential to redefine regional connectivity. This level of engagement demonstrates a robust, global desire for more direct "city pair" routes, especially under or unserved communities, making a strong case for the accelerated development and deployment of advanced air mobility technologies.



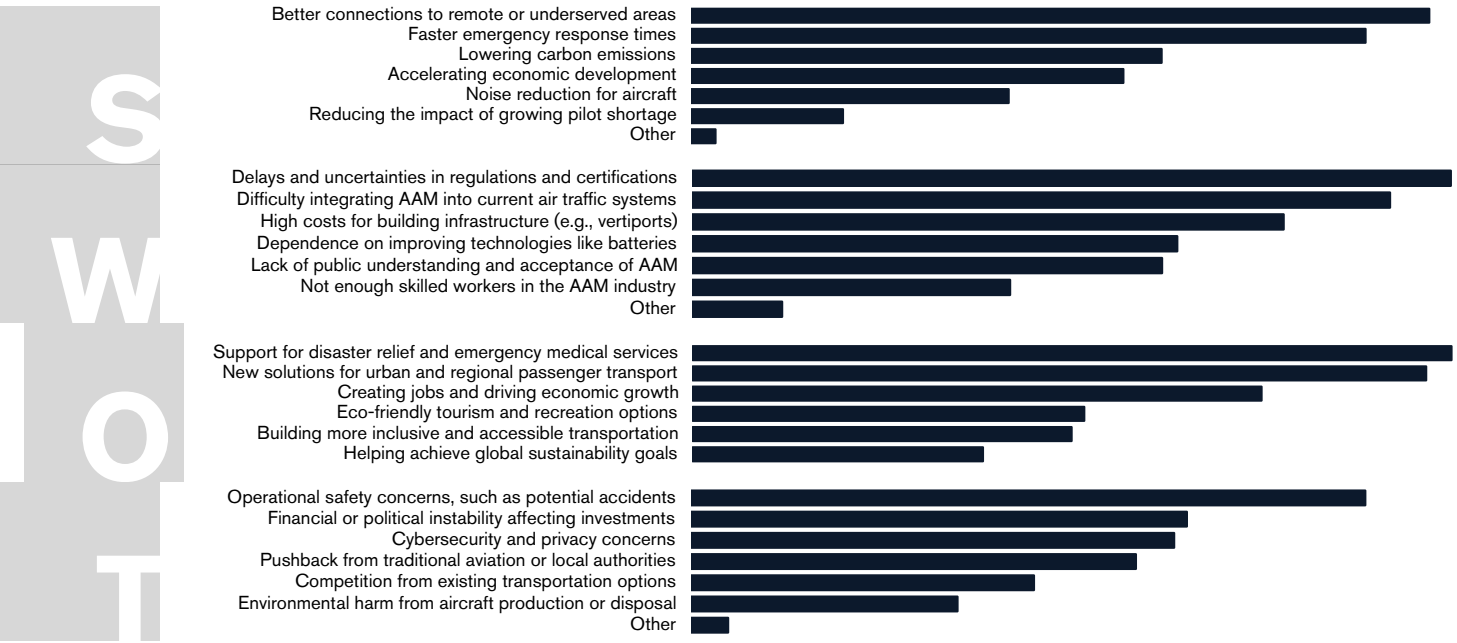
SWOT ANALYSIS

The Advanced Air Mobility (AAM) ecosystem stands at a pivotal juncture, poised to redefine transportation while addressing critical societal challenges. Our comprehensive SWOT analysis reveals a landscape marked by transformative strengths, pressing weaknesses, abundant opportunities, and tangible threats.

On the strength front, AAM's operational advantages are clear. Enhanced connectivity to remote areas, faster emergency response times, and reduced carbon emissions underscore AAM's potential to improve public safety and stimulate economic growth. These benefits, coupled with existing government support and solid regulatory frameworks, provide a robust foundation for industry advancement. However, these strengths must be leveraged alongside strategic investments in public outreach and infrastructure development, as well as improvement of existing infrastructure such as smaller airports both in rural areas and within in urban areas. Despite these promising attributes, several weaknesses impede progress. Delays in regulatory approvals, challenges integrating with current air traffic systems, old air traffic systems and high infrastructure costs—particularly for vertiports and new airport as well upgrading existing facilities. pose significant hurdles, as well threats from property developers seeking to close airfields and airports in sought after areas to make way fro housing and industrial estates and communities opposed to air operations. Moreover, dependencies on evolving technologies such as battery performance and a persistent lack of public understanding highlight the need for focused improvements. Addressing these issues through streamlined certification processes, innovative business models, and enhanced technical training is essential for accelerating deployment.

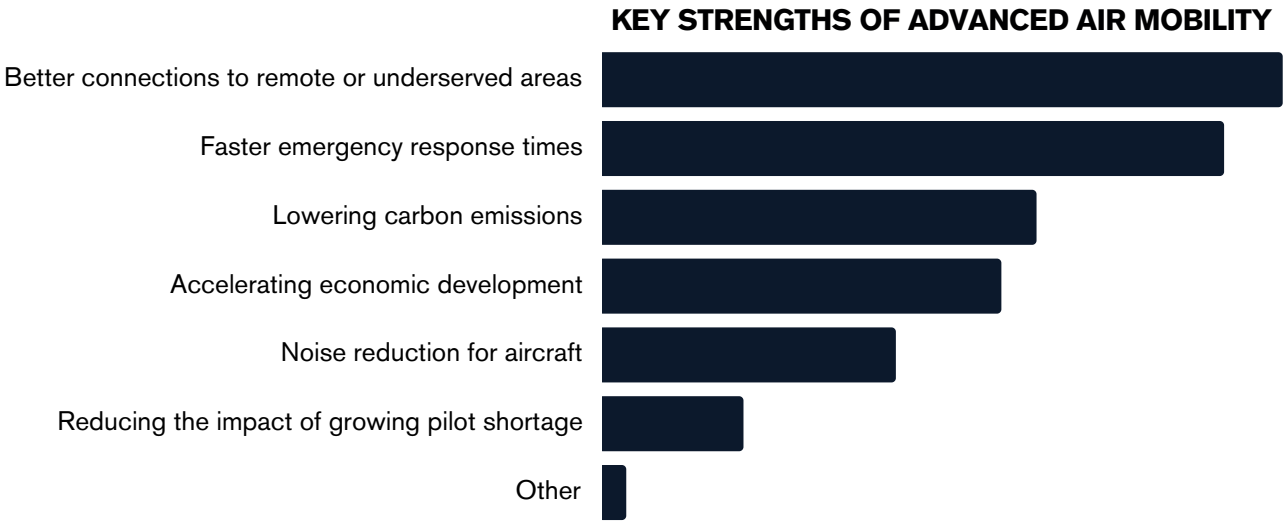
The opportunities for AAM are equally compelling. From revitalizing urban and regional transport to supporting disaster relief. improving healthcare and emergency medical services, AAM can drive job creation, foster economic inclusion, and contribute to sustainability goals. Its potential to serve as a catalyst for eco-friendly tourism and recreational innovations further expands its market appeal, creating new avenues for growth. Yet, the ecosystem is not without threats. Operational safety concerns, cybersecurity vulnerabilities, public perceptions, political and financial instabilities, political and lobbying pressure, and environmental impacts, such as visual and sound pollution, present real risks. These challenges necessitate robust safety protocols, comprehensive risk management strategies, and proactive stakeholder engagement.

By capitalizing on its strengths, mitigating weaknesses, and harnessing emerging opportunities while addressing imminent threats, the AAM industry can achieve transformative growth—delivering sustainable, wide-ranging benefits for communities worldwide.



STRENGTHS

This year's survey reveals that the AAM sector's strengths are increasingly defined by outcome-driven, operational benefits rather than just institutional support. Respondents highlighted the ability to forge better connections to remote or underserved areas and deliver faster emergency response times, both of which directly enhance public safety and community resilience. Additional strengths, such as lowering carbon emissions and accelerating economic development, emphasize a dual commitment to sustainability and economic vitality. These factors demonstrate that AAM is not only a technological innovation but also a practical solution for pressing societal needs. This operational focus helps attract investors and streamlines regulatory support, as stakeholders can point to measurable benefits. To build on these strengths, industry players should forge robust public-private partnerships and continue optimizing performance metrics, ensuring that AAM advances both economic and environmental objectives while addressing real-world transportation challenges.



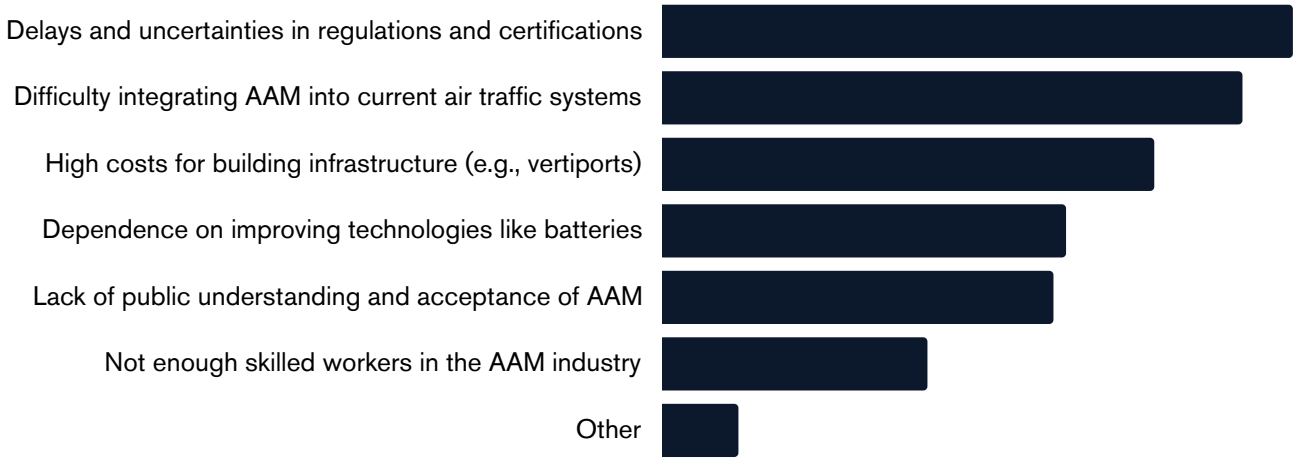
"Other" responses note cost reductions in infrastructure and minimized impacts in remote areas, such as repurposing underutilized runways, which further enhance the sector's appeal.

Last year, strengths centered on government support, regulatory frameworks, skilled workforce, and advanced infrastructure. This year, however, the focus has shifted toward direct operational outcomes—emphasizing connectivity, emergency response, and sustainability—demonstrating a maturation from theoretical enablers to actionable benefits.

WEAKNESSES

The current weaknesses in the AAM ecosystem have evolved from broad institutional challenges to specific, operational hurdles. Respondents now point to delays and uncertainties in regulatory approvals and certifications, which slow progress significantly. Integration issues with existing air traffic systems further complicate operational deployment, while high costs for infrastructure—such as vertiports—pose financial barriers. There is also a notable dependency on emerging technologies, particularly battery performance, which remains a critical bottleneck. In addition, the lack of public understanding and limited skilled workforce exacerbate these challenges. To address these issues, stakeholders must streamline certification processes, invest in training programs, and develop innovative business models for infrastructure development. Enhancing public education and accelerating technological improvements will be essential to overcoming these weaknesses and ensuring that the AAM ecosystem becomes robust, agile, and ready for scalable deployment.

CHALLENGES CURRENTLY SLOWING DOWN AAM



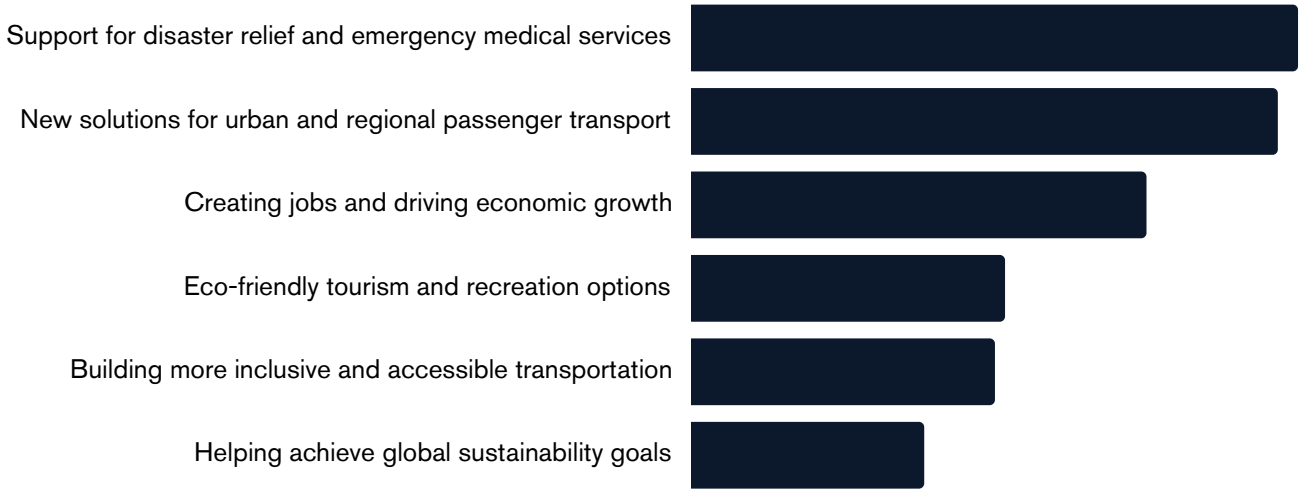
The “Other” category highlights the need for new business models for running vertiports and the necessity of securing access to green energy, indicating that cost isn’t the sole barrier—innovative operational strategies are also required.

Previously, weaknesses focused on regulatory bottlenecks, insufficient infrastructure, limited technical expertise, and public skepticism. This year, the issues have become more granular, centering on specific delays, integration challenges, and technological dependencies, reflecting a deeper understanding of operational obstacles.

OPPORTUNITIES

This year's survey underscores a market- and application-driven perspective on the opportunities for AAM. Respondents see vast potential in using AAM to support disaster relief and emergency medical services, as well as providing innovative solutions for urban and regional passenger transport. Opportunities to create jobs and drive economic growth are also prominent, reflecting AAM's capacity to transform local economies. Furthermore, there is growing enthusiasm for eco-friendly tourism and recreational options, along with the promise of building more inclusive, accessible transportation networks. These opportunities indicate that AAM can play a pivotal role in addressing global challenges such as proving ways to avoid the ever increasing urban congestion, environmental degradation, and economic disparity. To fully capitalize on these prospects, industry stakeholders should invest in technology development, foster international and national collaborations both in aerospace and aviation as well as other industries , and pursue policy initiatives that support sustainable growth, ultimately positioning AAM as a cornerstone of next-generation mobility and urban planning.

AAM OPPORTUNITIES TO ADDRESS GLOBAL PROBLEMS



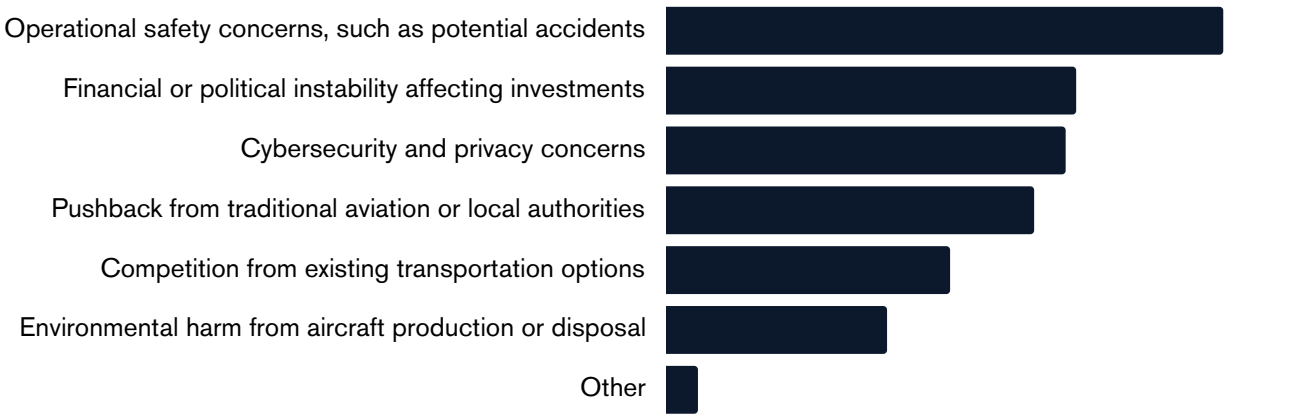
While not prominent this year, previous "Other" responses pointed to opportunities in growing tourism and leveraging developed crewed aerospace capabilities, hinting at additional market segments yet to be fully tapped.

Last year's opportunities focused on external trends such as international collaborations, technological advancements, and urbanization. This year, the opportunities have become more concrete and outcome-oriented—emphasizing disaster relief, new passenger transport models, and economic growth—indicating a more mature understanding of AAM's market potential.

THREATS

The threats facing AAM have shifted from abstract uncertainties to specific, actionable concerns as the industry nears deployment. Respondents now emphasize operational safety risks, including potential accidents, as a major threat. Financial and political instability further jeopardize investments, while cybersecurity and privacy issues raise significant operational challenges. Additionally, pushback from traditional aviation sectors and local authorities, as well as competition from existing transportation options, compound these risks. Environmental concerns, such as the potential for visual smog and harmful byproducts from aircraft production, are also emerging as critical issues. To mitigate these threats, it is essential for stakeholders to invest in robust safety protocols, develop comprehensive cybersecurity measures, and engage proactively with regulatory bodies and the public. By addressing these risks through coordinated strategies, the AAM industry can safeguard its progress and ensure a smooth, sustainable transition to widespread adoption.

RISKS TO SUCCESSFUL ADOPTION OF AAM



The "Other" category includes environmental concerns related to increased AAM activity—specifically, the risk of visual smog—highlighting that even aesthetic impacts can influence public perception and regulatory decisions.

While last year's threats centered on regulatory uncertainty, economic instability, and global competition, this year's responses reflect a more operational focus—addressing tangible risks such as safety, cybersecurity, and environmental harm, which indicates that stakeholders are now more concerned with the practical challenges of integrating AAM into existing systems.

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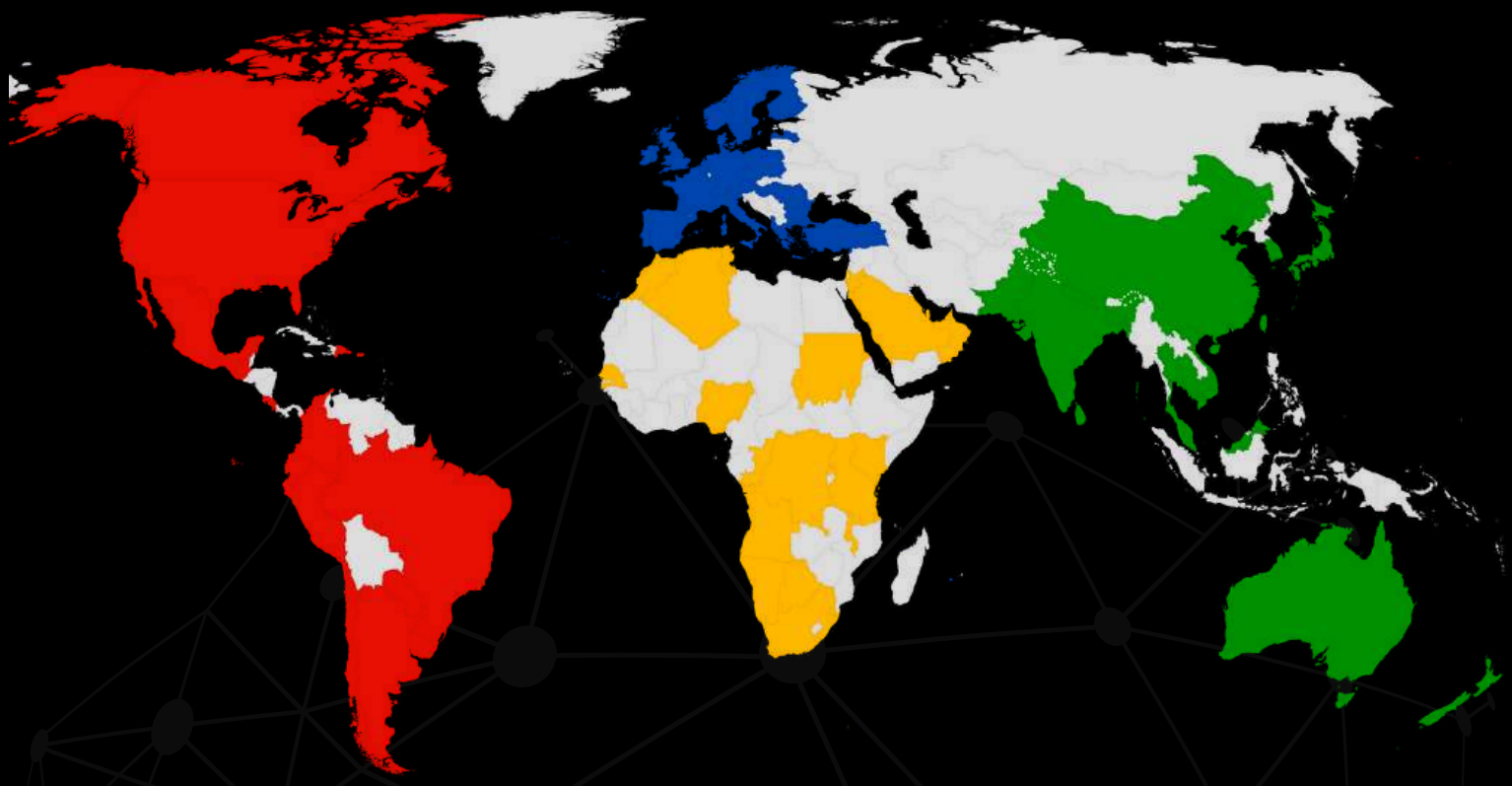

GAAMF
WINTER
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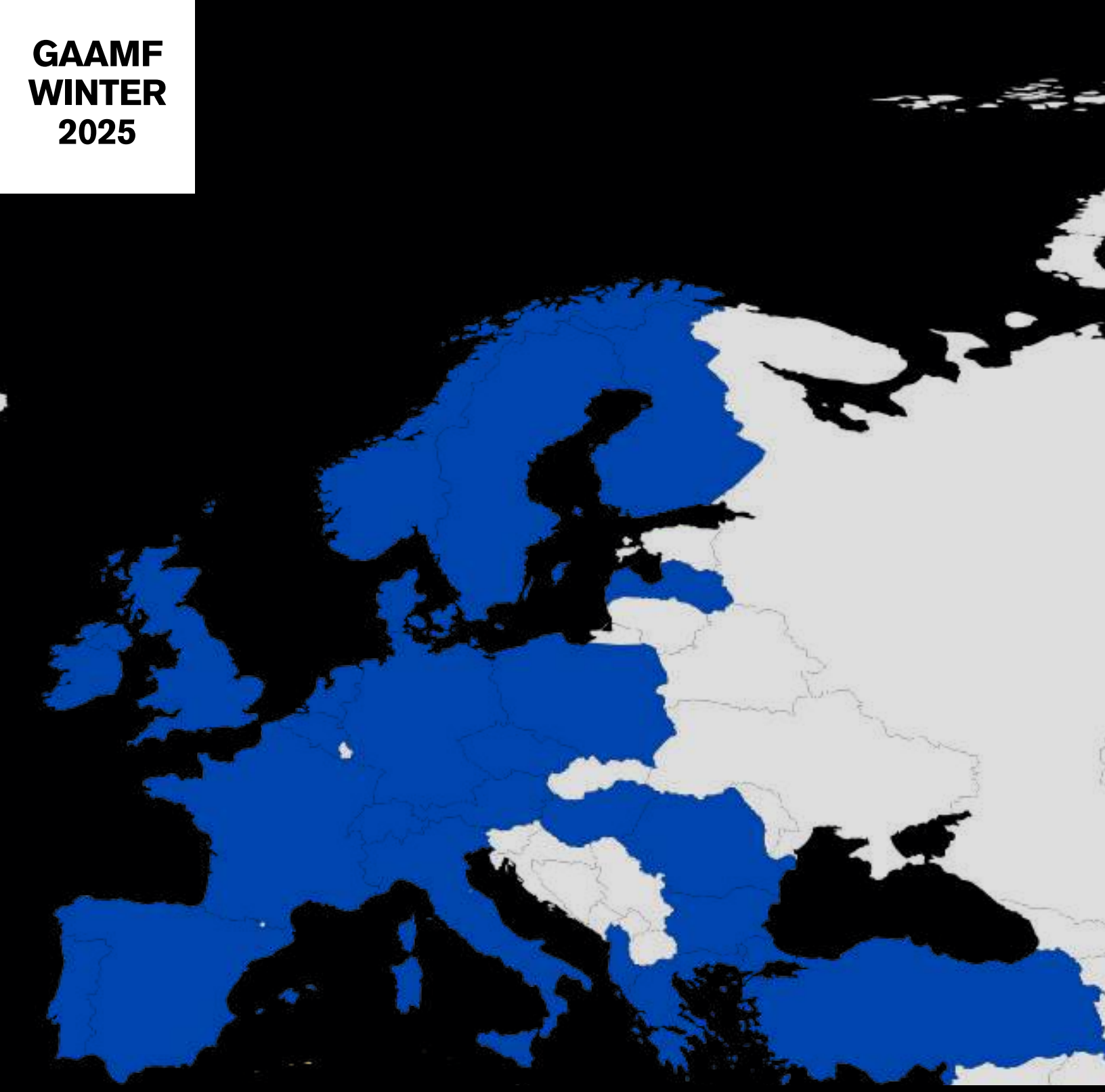

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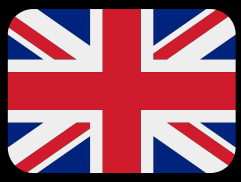
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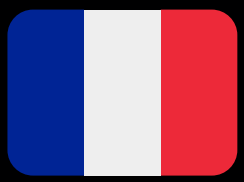
FRANCE


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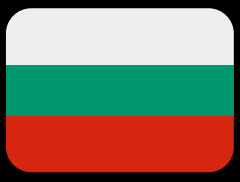
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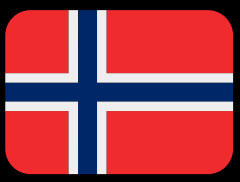
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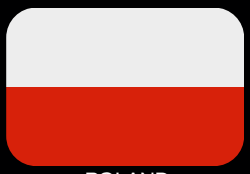
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FINLAND


BELGIUM


ALBANIA


CZECH REPUBLIC


GREECE


SWEDEN


LIECHTENSTEIN


TURKEY


SPAIN

“While we all, as each respective country liaisons do ensure building relationships in our AAM global ecosystem, promoting and contributing to local and regional initiatives, it’s important to coordinate actions at broader European level, facilitating communication, insuring participation and coverage of numerous cross-borders events and conferences.”

FRED MALLERET
REGIONAL COORDINATOR

ROMANIA

LIAISON: **KATRIN MAYRHOFER**

Chair of the Board of Liaisons

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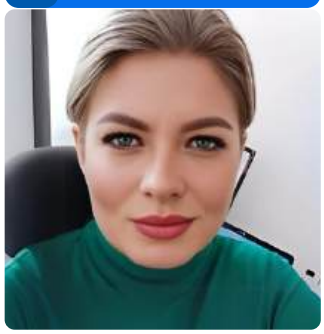

"WHAT I WOULD LIKE TO ANNOUNCE TODAY —SOMETHING NOT INCLUDED IN THE SLIDES FOR A COMPELLING REASON—IS THAT WE ARE CURRENTLY ESTABLISHING A FULL-SCALE VTOL TESTING CLUSTER IN ROMANIA, IN COLLABORATION WITH A PROMINENT US COMPANY. THIS PROJECT INCLUDES MAINTENANCE FACILITIES AND A PILOT TRAINING ACADEMY, ALL WHILE DEVELOPING THE NECESSARY VERTIPORT AND HYDROGEN INFRASTRUCTURE TO SUPPORT THESE NEXT-GENERATION VEHICLES."

Romania is charting an extraordinary course in the realm of advanced air mobility (AAM), solidifying its position as a global leader in aviation innovation. Under the visionary leadership of Katrin Mayrhofer, Chief Operating Officer and co-founder of Elsa Industry, the country has embarked on a transformative journey, marked by groundbreaking technological achievements and strategic international collaborations. At the heart of Romania's AAM revolution lies the Romanian Hydrogen and New Energy Technologies Hub (RO Hydro Hub) Project, a monumental €130 million initiative designed to position Romania as a trailblazer in advanced technology development. This ambitious project underscores the pivotal role of hydrogen in the energy transition, particularly in powering next-generation vertiport infrastructure and hydrogen-fueled aircraft. Elsa Industry's integral involvement in this initiative highlights Romania's unwavering commitment to fostering innovation through synergistic partnerships. Romania's strategic vision is further amplified by the implementation of its National Recovery and Resilience Plan, which has allocated significant resources to enhance unmanned aerial vehicle (UAV) capabilities. Coupled with an integrated country strategy that actively engages international stakeholders, Romania is accelerating innovation.

The country's regulatory framework has been meticulously aligned with EASA standards, ensuring seamless integration, operational safety, and global interoperability within the air mobility sector. In a groundbreaking announcement, Mayrhofer revealed an exciting new initiative: the establishment of a comprehensive VTOL testing cluster in Romania, developed in collaboration with a leading US company. This visionary project encompasses state-of-the-art maintenance facilities and a cutting-edge pilot training academy, designed to cultivate the next generation of AAM professionals. Running parallel to this initiative is the development of vertiport infrastructure and hydrogen energy systems, creating a holistic ecosystem to support the future of urban air mobility.

Public sentiment in Romania towards Urban Air Mobility (UAM) shows enthusiasm and caution. The potential benefits, like less traffic, faster medical deliveries, and passenger drone services, are exciting, but safety, privacy, and noise concerns remain. Successes in medical logistics and passenger drone trials are building trust and support for wider acceptance. Romania's legislative advancements and strategic partnerships drive progress, balancing innovation with infrastructure and safety, focusing on sustainability and safety.

Romania's bold strides in advanced air mobility are not just shaping the future of aviation within its borders—they are setting a global benchmark for innovation, collaboration, and sustainable progress. With leaders like Katrin Mayrhofer at the helm, the sky is no longer the limit; it is the beginning of a new era in air mobility.

UNITED KINGDOM

LIAISON: **PHILIP BUTTERWORTH-HAYES**

Board of Liaisons Vice Chair

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The United Kingdom's AAM trajectory is characterized by a methodical and cautious approach to technological implementation. While the country has significant potential, its progress is notably slower compared to other global markets. Two critical milestones define the UK's AAM journey: the widespread implementation of beyond visual line of sight (BVLOS) commercial drone operations and the certification and launch of passenger-carrying eVTOL aircraft. "We anticipate starting widespread BVLOS drone operations around 2027, with commercial eVTOL operations potentially beginning in 2028 or 2029, " Butterworth-Hayes forecasts, highlighting the measured pace of technological adoption.

The post-Brexit regulatory landscape presents both opportunities and challenges for the UK's AAM development. The nation has gained the flexibility to selectively adopt regulatory approaches from the European Union and United States, but simultaneously faces limitations in scale and resources. This unique position has resulted in a complex regulatory environment that requires careful navigation. The British Standards Institute's recent Future Flight Systems report has been instrumental in providing clarity, offering a comprehensive framework for businesses seeking to enter the AAM market. One of the most significant challenges facing UK AAM development is the intricate landscape of local authority regulations.

Butterworth-Hayes emphasizes the complexity of establishing urban vertiports, which can require addressing over 80 different bylaws and building regulations. This bureaucratic complexity suggests that initial eVTOL operations will likely be concentrated around underutilized airfields rather than urban centers, a pragmatic approach that circumvents immediate regulatory hurdles.

To address these challenges, Butterworth-Hayes has spearheaded the AAM for Gov project, a UKRI-funded educational initiative designed to bridge communication gaps between drone technologies, local authorities, and AAM innovators. This project aims to create a comprehensive resource that helps stakeholders understand the intricate regulatory, operational, and community integration challenges associated with advanced mobility technologies. By fostering understanding and creating clear pathways for implementation, the project represents a critical step in developing a more cohesive and supportive ecosystem for AAM innovation in the United Kingdom.

"THE ONE WORD WHICH YOU ARE NOT ALLOWED TO MENTION IN THE UK IN ADVANCED AIR MOBILITY IS 'PIZZAS.' WE HAVE PRIORITIZED ALMOST EXCLUSIVELY THE TRANSPORT OF MEDICAL SUPPLIES IN THE DRONE SPACE, WHICH IS A GREAT SOCIAL USE CASE, BUT IT'S NOT YET A GREAT BUSINESS CASE."

FRANCE

LIAISON: **FRED MALLERET**

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France's aerospace heritage, marked by pioneering companies like Airbus and Dassault, creates a fertile ground for innovative mobility solutions, with a clear emphasis on developing greener and more sustainable aviation technologies. The French AAM landscape is characterized by seven intriguing platforms spanning urban and regional mobility, each representing unique technological approaches to future transportation. Notably, France is making significant strides in developing versatile aircraft with blended body designs, exemplified by projects like Jet 0's large plane development. Malleret added, that the pragmatic approach to implementing advanced mobility solutions by regional air mobility utilising existing platforms has better chances of successful decorbanization in aviation.

Public sentiment and practical implementations are equally critical in France's AAM strategy. While initial plans for flying corridors during the Paris Olympics faced challenges—including strong opposition from city councils and regulatory hurdles—companies like Volocopter have continued demonstration efforts. These include showcasing aircraft capabilities over symbolic locations like the Versailles Castle park, symbolizing France's commitment to advancing the technology despite initial obstacles. The country's approach extends beyond mere technological development, incorporating strategic partnerships and infrastructure planning.

The French government and private sector are collaborating to create a comprehensive ecosystem for AAM, with a particular focus on cargo mobility and emergency services. Drone delivery initiatives, such as those by Delive Drone transporting medical goods between hospitals and laboratories, demonstrate practical applications that are gradually building public confidence.

"REGIONAL AIR MOBILITY, WHICH UTILIZES EXISTING PLATFORMS, HAS A HIGHER LIKELIHOOD OF SUCCESSFULLY DECARBONIZING AVIATION."

France's AAM strategy also emphasizes international collaboration and regulatory alignment. Malleret points out the country's proactive engagement with global aviation bodies, working to harmonize standards and create seamless integration for emerging mobility technologies. Events like the Towards Sustainable Aviation Summit and participation in international conferences underscore France's commitment to being a key player in shaping the future of advanced air mobility.

IRELAND

LIAISON: **JULIE GARLAND**

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"WE LIVE BY THE THREE DS - IF IT'S DULL, IF IT'S DIRTY, OR IF IT'S DANGEROUS, THEN A DRONE SHOULD BE DOING IT. WHAT WE'RE SEEING IS THAT THE INDUSTRY HAS NEVER GROWN AT THE RATE WE EXPECTED IT TO, BUT THE OPPORTUNITIES ARE NOW BECOMING VERY REAL."

Central to Ireland's advanced mobility strategy is the U-Space Digital Sky Demonstrator project, a groundbreaking initiative that showcases the country's commitment to innovative aerial technologies. Garland highlighted a significant investment of nearly 7 million euros to establish a digital sky demonstrator out of Shannon, creating a collaborative ecosystem that includes Collins Aerospace, Shannon Airport Group, Future Mobility Campus Ireland, Air Nav Ireland, and
local drone operators. "We are looking at the management of UAS airspace," Garland explained, "creating common information service providers and developing the ability to coordinate drone operations across different platforms."

A standout success story is Manna Drone Delivery, an Irish company that has conducted nearly 250,000 flights in urban and suburban environments. Operating in areas with approximately 5,500 people per square kilometer, Manna has demonstrated the practical viability of drone delivery services, delivering everything from coffees to pizzas directly to customers' gardens. This achievement has been pivotal in promoting Ireland's positive reputation in drone technology, with Garland noting the critical role of a supportive aviation regulator in facilitating such innovations.

Ireland's approach to advanced mobility is deeply collaborative and forward-looking. The country has been granted Erasmus co-funding for a Center of Vocational Excellence, bringing together partners from Ireland, Italy, Spain, Portugal, and Turkey. This initiative reflects a strategic approach to developing skills and expertise in emerging mobility technologies, ensuring that human capital keeps pace with technological advancements. Regulatory developments remain a key focus, with the implementation of SORA 2.5 (Specific Operations Risk Assessment) representing a significant evolution in drone operation frameworks. Garland's involvement with JARUS (Joint Authorities for Rulemaking on Unmanned Systems) underscores Ireland's commitment to developing international standards that balance innovation with safety and operational efficiency.

"The industry generally has not grown at the rate we expected, " Garland candidly acknowledged, highlighting the complex challenges of technological integration. Yet, her presentation painted a picture of Ireland as a proactive, optimistic player in the advanced mobility ecosystem. With a positive regulatory environment, supportive government policies, and a robust innovation infrastructure, the country is positioning itself as a key contributor to the global advanced mobility landscape.

AUSTRIA

REMUS MATEI

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Austria has emerging advanced air mobility landscape, highlighting the intersection of technological potential and strategic innovation in developing next-generation transportation solutions. The most notable industry milestone Matei highlighted was Cyclotec's groundbreaking work on a new flying vehicle - the Blackboard demonstrator, featuring an innovative propulsion system for flying cars. With the first electrically powered demonstrator flight planned for the first quarter of 2025, this project symbolizes Austria's commitment to pushing the boundaries of mobility technology.

The country's approach is deeply collaborative, involving key partnerships between the Ministry of Innovation and Technology, Austro Control, Austrian drone associations, and the Austrian Institute of Technology. Matei shared a compelling academic perspective, citing a research passage that eloquently captured the transformative potential of urban air mobility: "Technological advances have paved the way for urban air mobility as a new mode of transportation, providing solutions for both inner-city and regional transportation. " This quote encapsulated the broader vision of advanced mobility technologies - not just as a technological marvel, but as a potential solution to complex urban transportation challenges.

Major projects in Austria focus on cutting-edge technological development. The MATIS project explores electrical energy storage for hybrid electrical aircraft, while the HELENA project investigates next-generation solid-state batteries with potential applications in cars and aircraft. These initiatives demonstrate Austria's strategic approach to addressing critical infrastructure challenges in advanced mobility technologies. Public sentiment in Austria reflects a mix of excitement and cautious optimism.

“TECHNOLOGICAL ADVANCES HAVE PAVED THE WAY FOR URBAN AIR MOBILITY AS A NEW MODE OF TRANSPORTATION, PROVIDING SOLUTIONS FOR BOTH INNER-CITY AND REGIONAL TRANSPORTATION.”

However, Matei was transparent about the challenges, noting that flying taxis are still waiting for their "big breakthrough" - a sentiment that captures the current state of advanced mobility technologies.

As an architect, Matei is personally engaged in establishing a framework for vertical takeoff and landing hubs in remote mountain areas. His work highlights the complex challenges of designing infrastructure for advanced mobility, including navigating building approvals across different municipalities and regions.

"The complexity of designing a vertiport increases due to challenges associated with obtaining building approvals from different organizations," he explained, underscoring the multifaceted nature of implementing advanced mobility technologies. Matei's conclusion, drawn from academic research, emphasized the uncertain yet promising landscape of urban air mobility: Companies in this emerging field must carefully analyze market evolution, dominant design, and access to complementary assets to achieve commercial success. His presentation painted a picture of Austria not just as a technological participant, but as a thoughtful, strategic innovator in the advanced mobility ecosystem.

BULGARIA

IVO BARZOV

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As a member of the European Union, Bulgaria is intricately connected to the evolving regulatory frameworks surrounding drone and advanced mobility technologies. The country is actively following regulations developed by EASA (European Union Aviation Safety Agency) and working closely with local civil aviation authorities to establish comprehensive guidelines for unmanned system operations.

The primary legislative foundation is the Civil Aviation Act of Bulgaria, which provides a structured approach to regulating and supervising unmanned aerial system operations, reflecting a careful balance between technological innovation and safety considerations.A significant governmental initiative that caught Barzov's attention was the establishment of a test airspace in Rakowski, a project that represents a critical step in creating dedicated environments for drone and advanced mobility technology testing. "We hope that it will be happening in other regions in Bulgaria," Barzov noted, indicating the potential for broader technological infrastructure development across the country. This approach demonstrates Bulgaria's strategic intent to create controlled, safe environments for technological experimentation and integration.

Public sentiment in Bulgaria presents an intriguing landscape. Currently, drone operations are primarily conducted in the open category and have not generated significant concerns. The absence of major incidents in drone operations has contributed to a gradually increasing acceptance of the technology.

Barzov highlighted the importance of successful startups like Dronamics, which completed test flights with a full-scale Black Swan aircraft, as crucial in building public confidence and generating positive narratives around drone technologies.

The upcoming events, such as the Interdrone Expo in Sofia, provide critical platforms for industry dialogue and technological showcase. While the specific details for 2025 are yet to be announced, these events represent important opportunities for knowledge exchange and public engagement with advanced mobility technologies.

“WE CAN BE A LEADER IN AAM FOR THE BALKANS REGION!”

Looking forward, Barzov sees significant potential for Bulgaria to become a leader in the Balkan region. By establishing U-space test zones and collaborating with traffic service authorities and international investors, the country can develop a robust ecosystem for advanced mobility technologies. We can be a leader in the Balkans region, " he emphasized, highlighting the strategic importance of proactive technological development and international collaboration. Barzov's presentation reflected a nuanced understanding of technological integration -recognizing both the opportunities and the methodical approach required to successfully introduce advanced mobility technologies. His vision for Bulgaria was not just about technological adoption, but about creating a comprehensive, strategic approach to innovation that considers regulatory, social, and economic factors.

PORTUGAL

VERUSKA MAZZA RODRIGUES DIAS

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Portugal's approach to AAM is characterized by active participation in European research consortia, a focused national agenda called Aeronaxty, and a strategic emphasis on developing regional transportation and advanced mobility services. The Portuguese AAM landscape is distinguished by its methodical and multifaceted approach to technological development. While commercial initiatives currently prioritize cargo mobility, the country is systematically building the infrastructure and regulatory frameworks necessary for broader implementation. Key players are focusing on developing critical technologies such as flight termination systems and emergency response mechanisms, with a particular emphasis on healthcare sector applications. "We are focusing on understanding the expectations and requirements from our stakeholders," Rodrigues Dias explains, highlighting the country's deliberate, stakeholder-centric approach to mobility innovation.

Public sentiment in Portugal represents a nuanced and increasingly supportive perspective on AAM technologies. Research studies, primarily centered on the Lisbon metropolitan area, reveal promising insights: over 60% of the population understands the concept of urban air mobility, and an impressive 74% express interest in potentially using these technologies. While concerns persist about travel costs, safety, and environmental impact, there is a growing recognition of potential benefits such as time savings and reduced pollution.

The Portuguese government and private sector are collaborating closely to create a comprehensive AAM ecosystem. The technological roadmap for the aeronautical sector explicitly includes advanced air mobility as a key technological domain, and significant investments are being made in developing national sandboxes. These test zones are designed to attract both domestic and international players, leveraging Portugal's favorable operational conditions and supportive regulatory environment. Municipalities like Uberas are actively creating new infrastructures and providing events to support AAM development.

Portugal's regulatory approach, led by the Civil Aviation Authority (CAA), is particularly noteworthy. The CAA has developed a comprehensive roadmap for implementing European standards, creating specialized tools for UAS implementation, and activating dynamic airspace zones across different regions. By the end of 2024, at least four regions had been tested and validated for UAS space implementation, demonstrating the country's systematic and thorough approach to integrating new mobility technologies.

"IF WE CONSIDER THE METROPOLITAN POPULATION, MORE THAN 60% OF KNOW ABOUT ADVANCED AIR MOBILITY: WHAT IS THE PURPOSE AND WHAT IS THE CONCEPT. AND MORE THAN 74% HAVE INTEREST IN USING THE TECHNOLOGY."

NORWAY

ØYSTEIN SOLHEIM-AUNE

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Norway's AAM developments are particularly noteworthy, with several groundbreaking milestones marking the nation's commitment to sustainable aviation. Rolls-Royce, for instance, has successfully completed an initial run of a direct drive motor specifically designed for the commuter aircraft market, a project based in Trondheim that showcases the country's technological prowess. Perhaps even more exciting is Bristol Norway's bold initiative to become the country's first operator of electric aircraft routes, with a scheduled launch in August 2025 using aircraft supplied by Beta Technologies. These developments are complemented by strategic partnerships, such as L3 Group's agreement to distribute fully electrical aircraft and collaborate with Beta Aero to bring the B23 Energic to the Norway.

The broader context of Norway's AAM ecosystem reveals a multifaceted approach to sustainable transportation. "We see the potential for significant opportunities for government support in launching new AAM initiatives," Solheim-Aune emphasizes, highlighting the country's unique geographical and infrastructural advantages. With numerous remote communities and a well-developed short runway network, Norway is uniquely positioned to drive innovative mobility solutions. The government's ambitious aviation strategy focuses on creating a climate-neutral aviation environment by 2050, with Avinor and the Civil Aviation Authority signing a critical cooperation agreement to establish Norway as an international testing ground for zero and low emission aircraft. Beyond institutional efforts, Solheim-Aune's personal commitment to technological innovation is exemplified by his latest project with the Experimental Aircraft Association in Norway.

He is currently leading an initiative to convert a traditional petrol engine biplane into a fully electric powertrain, utilizing technology from electric motorcycles. This project represents more than a technical challenge; it's a symbolic effort to inspire and educate Norwegian aviation enthusiasts about the potential of electric propulsion. "Our primary aim is to create a compelling proof of concept while educating and inspiring EAA members and the public about the possibilities of innovative propulsion technologies," Solheim-Aune explains.

"NORWAY'S UNIQUE GEOGRAPHICALLY, WITH NUMEROUS REMOTE COMMUNITIES AND WELL DEVELOPED SHORT RUNWAY NETWORK SERVES AS A KEY DRIVER FOR THE GOVERNMENT'S AMBITIOUS AND INNOVATIVE AVIATION STRATEGY."

The public sentiment in Norway towards these technological advancements is cautiously optimistic. While there are concerns about battery technology and potential risks, the country's extensive and reliable electric vehicle fleet provides a sense of reassurance. Hydrogen research and flight tests, such as Joby's impressive 523-mile hydrogen-powered flight, further bolster confidence in emerging technologies. Solheim-Aune and his colleagues are not just developing technologies; they are crafting a narrative of sustainable, efficient, and innovative air mobility that could potentially serve as a model for other nations seeking to revolutionize their transportation systems.

LATVIA

ELIGIJUS JENTKUS

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In Latvia, the theme of air mobility is occasionally raised in public media. The media examines the global development of advanced air mobility and asks more questions of government entities (usually the Ministry of Transport, the Civil Aviation Agency, and the Riga City Council) when we can expect something similar? Latvia is well known among other countries in Northern Europe for the companies that produce drones for civil and military use and sell them worldwide (such as Aerones, FixAir, Edge Autonomy), but these companies focused only on this market segment, which has a stable and growing demand.

The main constraint in the development of air mobility for people transportation, even in the scope of intra-city transportation, is the lack of a potential company/operator/investor who would take the initiative and convince all involved parties to start with the serious preparation of the development strategy for the country, as if the strategy will be written from the government perspective without stakeholders' involvement, this document will be just a description of the desires from the bureaucratic point of view. From the government side, Latvia recently joined the programme Interreg Baltic Sea Region and conducts studies, public research, and shares experience with other countries on how in future the air mobility could look like and what are the constraints in the cities. In 2024, publicly appeared in the news to launch flight tests of the cargo drone between Liepaja (LPX airport) and Palanga (PLQ airport).

In this process, both countries' ATC providers (Latvijas Gaisa Satiksme from Latvia and Oro Navigacija from Lithuania) are planning a route along the shore of the Baltic Sea that will not affect the usual air traffic with a maximum height of 600m. The purpose of these test fights is to see the real live experience and the economic effect of such operations versus other modes of transportation. Test flight between two countries is a bit complicated as the procedures should be aligned and there will be no pilot on board. The series of test flights expected in August 2025. Both countries see that cargo transportation has more chances now than passenger transportation, especially if this will be at the regional level with small airports.

"LATVIA, KNOWN FOR ITS INNOVATIVE DRONE COMPANIES, IS TAKING CAUTIOUS STEPS TOWARDS ADVANCED AIR MOBILITY. WHILE CARGO DRONE TESTS BETWEEN LIEPAJA AND PALANGA AIRPORTS ARE PLANNED FOR AUGUST 2025, THE COUNTRY STILL LACKS A COMPREHENSIVE STRATEGY FOR PASSENGER AIR MOBILITY, HIGHLIGHTING THE NEED FOR GREATER STAKEHOLDER INVOLVEMENT IN SHAPING LATVIA'S URBAN AIR TRANSPORTATION FUTURE."

POLAND

LIAISON: **MALGORZATA WOJTAS**

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A significant technological milestone for Poland has been the development of a centralized platform for drone operators called Drone Golf Bell. This innovative system provides operators with comprehensive capabilities, including flight zone management, incident reporting, and access to the latest regulatory information. The platform represents a sophisticated approach to managing the complex operational landscape of unmanned aerial technologies, demonstrating Poland's commitment to creating robust, user-friendly infrastructure for technological innovation.

"POLAND IS PUTTING A BIG EMPHASIS ON REGULATIONS, SAFETY, AND AIRSPACE TRACKING MANAGEMENT."

The country has been actively working on national recovery and analysis projects aimed at developing network facilities and skills for the UAS and advanced mobility industry. Wojtas highlighted her particular interest in AI algorithms for drone operations, underscoring the technological sophistication underlying Poland's approach to mobility innovations. Recent public opinion research from Megajo revealed a surprisingly positive public sentiment, with particularly strong support for emergency service applications and potential future passenger drone technologies. Wojtas explained that the main emphasis is on regulations, safety, and space regulation management, revealing the country's methodical approach to technological integration.

Public concerns typically revolve around privacy, noise, and safety considerations - challenges that are remarkably consistent across global advanced mobility discussions. However, the research suggests a high level of acceptance, particularly in urban areas, with citizens showing significant interest in the potential transformative capabilities of drone and advanced mobility technologies. The Institute of Aviation, where Wojtas works, is actively developing several cutting-edge projects.

These include working on silent router applications, professional router technologies, and innovative initiatives like an anti-icing system for fixed-wing unmanned aerial vehicles. The institute has also been developing a satellite-free navigation system, initially tested on small planes and combat training aircraft, and now being adapted for more advanced drone applications. Upcoming events like the Business and Science Days in May provide critical platforms for showcasing technological advancements and fostering industry dialogue. Wojtas emphasized that Poland's strategy extends beyond mere technological development, focusing on creating a comprehensive ecosystem that supports innovation, ensures safety, and addresses potential societal concerns.

Wojtas's presentation painted Poland not as a peripheral technological player, but as a sophisticated, forward-thinking contributor to the global advanced mobility landscape. By prioritizing regulatory frameworks, safety considerations, and technological innovation, Poland is positioning itself as a key player in the evolving world of unmanned and advanced mobility technologies.

NETHERLANDS

LIAISON: **BEAU METZ**

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"THE GOALS IS TO THRIVE LOCAL PUBLIC ACCEPTANCE BY STIMULATION OF LOCAL BUSINESSES AND EDUCATION FOCUSED ON NEW AIR MOBILITY."

Dutch police finds oil spill by using an Avy professional drone. Deltaquad drones raised their operational ceiling to 5500 meters and now support defense capabilities in Ukraine. On the negative side, there have been multiple unregistered drones around prison areas, raising public concern on safety. Studio to Create and the Amsterdam Drone Lab completed an orientation study on three locations around Amsterdam on how to incorporate Drones/AAM in current Urban environment.

This study is unique due to the involvement of architects and Urban planners alongside market professionals. The goals is to thrive local public acceptance by stimulation of local businesses and education focused on new air mobility. They have been working with district in the full value chain of the local area. The result is a blueprint for the establishment of a mobility hub, gaining value for each individual in the district: Medical, deliveries, education, businesses, transportation. The follow-up study provides opportunities for all players in AAM to take part in their field of expertise.

NRG2Fly and E-flight academy, two Dutch powerhouses for electrical flying. NRG2Fly has installed chargers at a second Dutch airport, with three more to come this year. Suppling power to Existing Aircraft, New aircraft (testing and system testing) and ground vehicles on both air and land side. Creating the ideal testing environment countrywide for Air mobility development.

E-flight academy is world's first full electric flight school, using Pipistrel Velis aircraft for training purposes. They have successfully completed a public funding round, showcasing the enthusiasm on electrical flying in society. The PAL-V Liberty has passed its MOT (roadworthiness) check, completing four years of road registration. PAL-V and Breda International Airport has signed an LOI on a new Assembly and Delivery center at the Dutch airport. Dutch fire brigade has shown interest in the PAL-V Liberty as personal-logistics solution. PAL-V is also proud to announce that it has received the prestigious Industry Leadership Award at the Low Altitude Science and Technology Development Conference, hosted by the UAV Industry Committee of the Shaanxi International Chamber of Commerce.

ITALY

LIAISON: **SALVO FORZESE**

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Italy is establishing itself as a European leader in Advanced Air Mobility (AAM) through progressive regulations and strategic partnerships. ENAC has played a key role in shaping regulatory frameworks for Vertical Takeoff and Landing Aircraft (VCA) and the U-Space system, setting recognized safety and efficiency standards. A major milestone was the launch of Europe's first U-Space zone in Chieti, reinforcing Italy's commitment to innovation. Another key initiative is HyperTwin, a Digital Twin platform developed by ENAC and the Department for Digital Transformation to optimize airspace management.

Italy is expanding its AAM ecosystem with vertiports in Varese, Venice, and Rome, while the Grottaglie Test Bed leads BVLOS flight testing and drone integration with satellite support. Operational advancements include: Poste Italiane's drone deliveries to islands, Amazon Prime Air's inaugural operations, Medical drone transport pilots, demonstrating AAM's role in healthcare. Public perception is key to AAM's success. Studies like the Ohio case highlight growing support, particularly for medical deliveries and infrastructure monitoring. However, concerns over safety, privacy, and noise persist. The PAS-Report-606a underscores the need for community engagement. Italy is addressing this by promoting co-design initiatives, workshops, and public demonstrations to build trust. Effective communication of AAM's environmental and social benefits, such as emission reductions and better service accessibility, is essential for positioning AAM as a symbol of sustainable progress.

Italy will strengthen AAM adoption through major industry events: Dronitaly, Rome Drone Conference, and the Navacchio Symposium will focus on emerging AAM technologies. The Milan Polytechnic Drone Observatory (February 2025) will address the transition from trials to full-scale operations. These events will drive collaboration, knowledge sharing, and Italy's role as a European AAM hub.

"ITALY HAS ESTABLISHED ITSELF AS A EUROPEAN LEADER IN ADVANCED AIR MOBILITY, THANKS TO A PROGRESSIVE APPROACH, REGULATORY FRAMEWORK AND PIONEERING INITIATIONS PROMOTED BY ENAC."

Italy must move from experimentation to full-scale AAM integration, ensuring innovation aligns with real community needs. My role is to bridge technology, institutions, and communities, making AAM a practical mobility solution. To achieve this, Forzese added that his main focus is on: Strengthening collaboration between ANCI Nazionale, ENAC, and stakeholders to align AAM with territorial priorities. Developing sustainable infrastructure, including regulated vertiports and U-Space corridors for safe operations. Promoting social innovation, fostering public trust through education and engagement.Enhancing national coordination, ensuring a shared roadmap for AAM deployment. Italy shall not only adopt AAM but lead Europe in responsible AAM innovation. Through his work, Forzese strives to build a collaborative ecosystem where AAM becomes a pillar of cultural, social, and economic progress.

SWITZERLAND

LIAISON: **AURÉLIE JOY PASCUAL-WERNER**

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Switzerland's innovative ecosystem, balancing technological potential with practical considerations of societal impact and economic viability was presented by Aurélie Joy Pascual-Werner. The most compelling milestone she highlighted was a groundbreaking collaboration between Dufour Aerospace and Air Zermatt, a major emergency helicopter rescue operator located in the heart of the Alps. This three-year partnership aims to explore drone and advanced air mobility applications specifically designed for rescue operations, with a critical focus on delivering critical goods to populations in small valleys and remote areas. "This collaboration will give a lot of visibility to the AAM industry," Pascual-Werner explained, and also provides a good image of the social benefits it brings" - a statement that encapsulated the Swiss approach of marrying technological innovation with tangible human utility.

The public sentiment in Switzerland presented an intriguing dichotomy. Mainstream media typically focuses on defense applications of drones, often featuring shocking headlines about modified drones and dual-use technologies. However, specialized economic publications tell a different story, highlighting the successes of companies like Rigich, which is pioneering medical deliveries, and Flyability, developing drones for accessing hard-to-reach areas. This media landscape reflects the complex public perception of drone and advanced mobility technologies in the country. Switzerland's upcoming events, such as EBACE in May, promise to further expose and integrate AAM technologies. Pascual-Werner noted that this European business aviation convention would provide a crucial platform for exchanging ideas between advanced air mobility and business aviation communities.

The country's approach to technological integration is deeply pragmatic, with two crucial factors driving potential success: demonstrable societal benefits and clear economic viability. "Especially in Switzerland, where everything is expensive, " she candidly noted, "you need to be able to make money out of this." The country's approach to technological integration is deeply pragmatic, with two crucial factors driving potential success: demonstrable societal benefits and clear economic viability. "Especially in Switzerland, where everything is expensive, " she candidly noted, "you need to be able to make money out of this."

"THE MAIN ASPECTS THAT INFLUENCE THE SUCCESS OF AAM IN SWITZERLAND REMAIN THE BENEFITS FOR SOCIETY AND ECONOMIC VIABILITY. WITH THESE TWO ASPECTS COVERED, THE FUTURE OF THE INDUSTRY IS PROMISING BECAUSE WE HAVE A POPULATION THAT'S OPEN TO INNOVATION."

Challenges remain, particularly regarding landscape preservation - a significant concern in a country known for its pristine natural environments - and infrastructure requirements. However, Pascual-Werner remained optimistically realistic. She highlighted emerging trends that continuously balance potential negative perceptions with positive technological developments, particularly in noise reduction and environmental impact mitigation. Her presentation reflected Switzerland's characteristic approach: measured, innovative, and always seeking practical solutions that serve both technological progress and societal needs.

DENMARK

LIAISON: **JOHN MARTIN WINTHER ANDERSEN**

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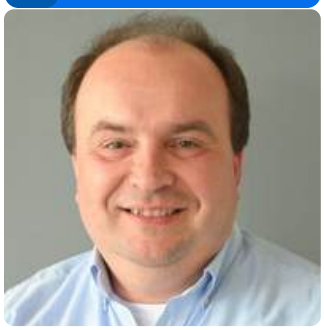

In September 2023, Andersen and his partners initiated a groundbreaking protocol called NDR 2.0, a collaborative effort involving US Denmark, Comping Helicopter, the University of Southern Denmark, and Skyposler - a company developing electronic air traffic control systems. The project's ambitious goal is to systematically investigate, evaluate, and ultimately test the potential for implementing advanced air mobility within the Danish airspace. Funded by the EU and the Danish Board of Business Development, this initiative represents a comprehensive approach to understanding the complex challenges and opportunities of integrating new mobility technologies. Electrification of aviation is not just a technological aspiration for Denmark, but a strategic national objective. The Danish Parliament has set ambitious goals for developing CO2-neutral domestic routes, initially targeting 2030. "We know that's not going to happen immediately," Andersen candidly noted, acknowledging the challenges of transitioning to sustainable aviation technologies. This realistic yet optimistic approach characterizes Denmark's method of technological integration - pragmatic, forward-thinking, and deeply committed to environmental sustainability.

The country has already made significant strides in creating supportive infrastructure for innovative mobility technologies. US Demo, a critical center for manned and unmanned autonomous aviation, offers up to 3,000 square kilometers of dedicated airspace for beyond visual line of sight operations.

"COST IS EVERYTHING. IF WE NEED TO SCALE THIS BUSINESS UP, COST IS EVERYTHING. OTHERWISE YOU CANNOT EXPECT THE AVERAGE PERSON TO BE ABLE TO AFFORD THESE KIND OF SERVICES. THE POINT IS TO MAKE IT ACCESSIBLE TO EVERYONE."

This infrastructure provides a unique testing ground for emerging technologies, demonstrating Denmark's commitment to creating supportive ecosystems for technological innovation. Public sentiment in Denmark reflects a growing curiosity and cautious optimism about electrification and advanced mobility technologies. Andersen highlighted that when interacting with customers, the responses are increasingly positive - people are surprised to learn that battery-powered aircraft are not a distant future concept, but an emerging reality. However, he emphasized the critical need for transparent communication, particularly around complex topics like battery recycling and environmental impact.

Andersen underscored the economic considerations that will ultimately determine the widespread adoption of advanced mobility technologies. The ability to develop cost-effective solutions that can be accessible to average consumers remains a fundamental challenge. His approach suggests looking beyond traditional aviation paradigms, learning from historical practices while remaining open to revolutionary technological approaches. Andersen's vision extends beyond mere technological implementation. He advocates for a holistic approach that considers infrastructure development, economic feasibility, and public education. By working to create simple, cost-effective infrastructure and maintaining transparency about technological capabilities and limitations, Denmark is positioning itself as a thoughtful pioneer in the advanced mobility landscape.

FINLAND

ARI ETELAVUORI

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At the forefront of European advancement, Finland has established the continent's first ADS-B universal access transceiver ground station test environment through the Nelly Research Unit at Southeastern Finland University of Applied Sciences. The country's commitment to innovation is further demonstrated through multiple 5G network test cases and the Technical Research Center of Finland's aviation team's diverse portfolio of projects.

The IMO Project, one of their flagship initiatives, explores the transition from traditional owner-operator business models to fleet operator frameworks, aiming to enhance drone fleet utilization - a crucial consideration for smaller markets like Finland. The DROP@Times project focuses on fully autonomous operations of mixed fleets combining robots and drones for logistics and surveillance, while the ROLLO 2 project addresses the critical challenge of airspace data integration between ATM and UTM systems.

A significant development in urban mobility has emerged through the Metropolitan UAM project, where the cities of Helsinki, Espoo, and Vantaa have formed a groundbreaking consortium with BETA and Forum Virium Helsinki. This collaboration aims to promote urban aviation across the entire Helsinki metropolitan area, demonstrating strong commitment to developing UTM systems through equivalent collaboration.

The Nordic countries' joint declaration to advance electric aviation, now included in the government program, underscores Finland's regional leadership. Public sentiment research, conducted through the City UAM project partnering with cities like Stockholm, Hamburg, Riga, Tartu, and Gdansk, revealed intriguing insights about social acceptance of drones.

"THERE IS STILL A LOT OF FRAGMENTATION AMONG STAKEHOLDERS. BETTER GOVERNMENTAL LEVEL COORDINATION AND SUPPORT WOULD BE BENEFICIAL. HOWEVER, CITIES ARE INCREASINGLY TAKING THE LEAD. WIDE-RANGING, MULTIDISCIPLINARY ECOSYSTEMS ARE EMERGING TO REALLY WORK TOGETHER FOR A BRIGHTER FUTURE OF AAM DEVELOPMENT IN THE WHOLE OF FINLAND."

Based on 500 respondents in Helsinki, the study identified emergency response, environmental monitoring, and infrastructure inspection as the most acceptable drone applications, while privacy violations, data misuse, and criminal activity emerged as primary concerns. The research also indicated that industrial areas and commercial building rooftops were considered the most suitable launch and landing sites, reflecting a pragmatic approach to infrastructure development.

BELGIUM

NDONGO MAKUMBU GLORIA

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Gloria brought a unique regulatory and business development perspective that illuminated Belgium's nuanced approach to integrating emerging mobility technologies. Two remarkable projects highlighted Belgium's innovative trajectory in 2024. The Belgian company IDLC conducted groundbreaking cargo flights over seaports, specifically transporting dangerous petroleum samples from boats to laboratories for analysis. Another significant initiative involved Eloquyous, which developed an ingenious drone system linking hospitals to create a sophisticated medical sample transportation network. This portable device demonstrated remarkable technical sophistication, featuring a modular design capable of automated transportation and temporary storage of standardized cargo units.

Both projects were validated by the Belgian Civil Aviation Authority (BCAA) using the SORA 2.0 risk analysis framework, underscoring Belgium's commitment to maintaining rigorous safety standards while fostering technological innovation. Gloria highlighted the evolving regulatory landscape that supports technological advancement. Public sentiment in Belgium reveals a gradually increasing acceptance of drone technologies.

While initial reluctance existed in residential areas, unmanned aerial systems are becoming an increasingly integrated part of everyday life, particularly in recreational contexts. Gloria noted that this acceptance is part of a broader trend of technological openness and practical application of innovative solutions.

Belgium's compact geographic size and complex military zone configurations present unique challenges for drone and advanced mobility technologies. However, Gloria emphasized that these limitations do not impede technological development. ID to Move maintains a test zone that actively develops innovative projects, with national regulations being continuously reviewed to accommodate technological innovations in alignment with European standards.

"THE BCAA IS INCREASINGLY WORKING WITH OPERATORS, OPENING UP NEW OPPORTUNITIES FOR MORE AMBITIOUS PROJECTS."

As a professional focused on the French-speaking region of Wallonia, Gloria is actively working to expand test zones and accommodate larger-scale projects. Her work extends beyond national boundaries, including international business consulting for French-speaking African markets, demonstrating the global interconnectedness of advanced mobility technologies. The upcoming Drone Tech Demo in Naval during March 2025 provides a critical platform for showcasing technological advancements and fostering industry dialogue. Gloria's presentation painted Belgium not as a peripheral player, but as a strategic, thoughtful contributor to the global advanced mobility ecosystem, carefully balancing technological innovation with comprehensive regulatory frameworks.

ALBANIA

ADRIAN HAXHIAJ

Connect on LinkedIn

"THE DRONE INDUSTRY IS CONSOLIDATING AND BUSINESS CASES ARE GROWING. DIRECT CONTACT AND GOOD NETWORKING IS CRUCIAL TO MAINTAIN VISIBILITY. VERY INFORMATIVE DISCUSSIONS."

Albania, although not yet a member of the EU, is the only country in the Western Balkans that has embraced and introduced the newest EASA regulations on UAS. Specifically, Regulations 2019/945, 2019/947, and 2020/664 are crucial legal steps in regulating and establishing a healthy UAS sector in Albania. Regulation 2020/664, in particular, will open the horizon for the introduction of U-Space and is expected to spark further discussions on UAM/AAM in the region.

The UAS sector and, by extension, UAM/AAM business cases are not yet fully developed. However, the increasing use of UAS is prompting industry stakeholders to consider all aspects of these emerging aviation technologies. So far, only sporadically organized conferences and workshops have sought to raise awareness about UAVs, with key institutions such as the Albanian Civil Aviation Authority (CAA), the Ministry of Energy and Infrastructure, and the Municipality of Tirana taking part in these discussions.

In the context of UAM/AAM, no comprehensive study or data has yet been collected to paint a clear picture of public awareness or reaction, particularly regarding eVTOL activities. In general, public opinion recognizes the various applications of UAS across sectors. Drones are currently most prevalent in film and photography, media, tourism attractions, and marketing.

There is also a notable increase in business cases involving inspections, photogrammetry, agriculture, construction, and first responder operations. Although most of these applications fall under the open category, many businesses also use BVLOS operations, which pertain to the specific category. For these business cases, there have been no negative perceptions or incidents recorded. The only area of public discussion has been related to the military use of drones, which is met with greater public understanding given the inherent nature of defense.

At present, there are no business cases for drones used in transport—neither in urban areas nor outside populated regions—and the Albanian government has not yet prioritized the development of a comprehensive UAM/AAM strategy. Nonetheless, increased UAS usage for public safety and first responders is contributing to growing industry awareness. In this evolving landscape, Albadron, established in January 2021, is playing a pivotal role.

Working closely with the Albanian CAA, Albadron is actively promoting UAM/AAM through training, consultancy, and legal advisory services. Their initiatives—ranging from drone monitoring to regional cooperation projects—are vital in preparing Albania for future advancements in UAM/AAM, especially as the country aspires to EU membership by 2030.

CZECH REPUBLIC

JIRI MADEJA

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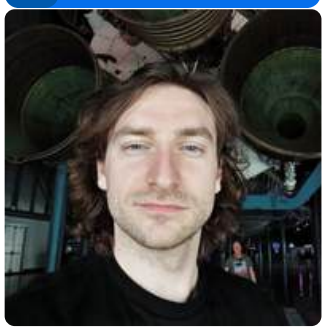

"IN THE CZECH REPUBLIC, THERE IS POSSIBILITY OF SUCCESS IN THE COMPANIES. THE GOVERNMENT TRIES TO HELP THEM, BUT USUALLY NOT IN LARGE FINANCIAL SUPPORT - MORE LIKE BRINGING AWARENESS TO THE COMPANIES AND GIVING THEM CREDIBILITY."

The Czech Republic's advanced mobility ecosystem is characterized by a small but promising cluster of players, with three major entities standing out: Jiri, Visit Aerospace, and Madeja's own UDX, each contributing unique dimensions to the nation's technological exploration. The technological milestones in the Czech Republic reflect a cautious but curious approach to advanced air mobility. Jiri, one of the prominent players, has secured a significant 4.4 million euro investment, signaling growing investor confidence in the sector. Meanwhile, Visit Aerospace, rooted in a century-old research center, demonstrates a more institutionally backed approach, having already hosted high-profile interactions with the Czech President and Minister of Transport. These developments suggest a gradual but meaningful integration of advanced mobility technologies into the national technological discourse.

"We are a small country and usually AAM stuff is glued to other events that are not really focused on something like this, Madeja candidly shared, highlighting the challenges of developing a distinct advanced mobility ecosystem in a smaller European nation. The public sentiment in the Czech Republic presents a nuanced narrative of technological curiosity tempered by pragmatic skepticism.

While the market remains relatively niche, those engaged with the technology exhibit a genuine interest in its potential and developmental trajectory. Concerns about safety, legislation, and the practical viability of advanced air mobility technologies predominate, reflecting a measured approach to technological adoption. Madeja's insights reveal a deeper structural challenge: the inherent limitations of the Czech landscape, characterized by historical urban configurations and limited large metropolitan areas, which pose intrinsic challenges to widespread advanced mobility implementation.

Looking forward, the Czech approach to advanced air mobility seems characterized by strategic patience and selective engagement. The government's role appears supportive yet not aggressively interventionist, providing credibility to emerging companies more throug awareness and soft support than direct financial investment. "The government tries to help them, but usually not in a large financial way, more like bringing awareness to the companies and giving them some credibility," Madeja explained, encapsulating the national strategy of nurturing technological innovation through recognition rather than direct financial underwriting.

GREECE

CHRISTOS XYLOKOTAS

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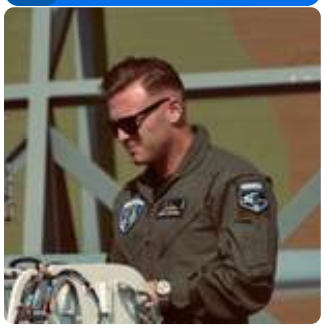

Greece is systematically building its advanced air mobility infrastructure, beginning with the planned establishment of a drone hub at Piraeus Port, Europe's largest passenger port. This initiative, spearheaded by the Union of Greek Maritime Enterprises, represents a significant step toward integrating drone technology into Greece's critical transportation infrastructure.

The regulatory landscape in Greece benefits from its membership in the European Union, allowing it to align with EASA regulations and legislation. Recent developments include EASA's publication of ED-DST-35, a crucial guidance document for medium-risk UAS operations that specifically addresses SAIL 3 and 4 requirements under the SORA methodology. Additionally, EASA's release of easy access rules for small-category VTOL-capable aircraft demonstrates the region's commitment to enhancing design, validation, and certification readiness for advanced air mobility integration.

"GREECE FOLLOWS EASA REGULATION AND LEGISLATION AS A MEMBER OF THE EUROPEAN UNION. OUR SUCCESS IN WILDFIRE MANAGEMENT DEMONSTRATES THE POSITIVE POTENTIAL OF THIS TECHNOLOGY, AND THE NEW PORT DRONE HUB WILL FURTHER INTEGRATE UAVS INTO OUR INFRASTRUCTURE. GREECE'S UNIQUE GEOGRAPHY, WITH ITS NUMEROUS ISLANDS AND COASTAL REGIONS, MAKES IT AN IDEAL TESTING GROUND FOR INDIVIDUAL APPLICATIONS. THIS COULD REVOLUTIONIZE INTER-ISLAND TRANSPORTATION WHILE PROMOTING SUSTAINABLE MOBILITY."

One of Greece's most compelling success stories has been in wildfire management, where drone technology implementation has yielded remarkable results. Prime Minister Kyriakos Mitsotakis reported a significant reduction in burnt forest areas compared to the previous two decades, earning recognition from international media outlets like Bloomberg Television for the country's innovative approach to civil protection. The public's acceptance of drone technology has been gradually building through creative initiatives like drone light shows conducted by companies such as Sky Symphony, MacDrone, and Grizzly Drones. These displays serve a dual purpose: entertaining the public while familiarizing them with drone technology and its potential applications.

However, Xylokotas acknowledged that challenges remain, particularly regarding public sentiment about military drone applications and their portrayal in ongoing conflicts. Despite these challenges, Greece's success in wildfire management demonstrates the positive potential of this technology. Looking ahead, Greece's unique geography, with its numerous islands and coastal regions, presents ideal testing grounds for advanced air mobility applications, particularly in the tourism sector. This could revolutionize inter-island transportation while promoting sustainable mobility solutions.

SWEDEN

LIAISON: **ISABELLE NYROTH**

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"SWEDEN IS POISED TO LEAD SUSTAINABLE AAM. WE ARE EMPHASIZING FROM THE GET-GO TO KEEP A GREEN AVIATION VISION. WE WANT TO STAY AWAY FROM THIS BEING JUST FOR THE FEW RICH - THIS IS GOING TO BE SOMETHING FOR EVERYONE THAT BRINGS IMPACT POSITIVELY."

Sweden has achieved several groundbreaking milestones in 2024, most notably establishing one of Europe's first urban drone ports in Northern Sweden. This facility is designed to support research, education, and testing of drone solutions, with operations set to commence in 2025. Simultaneously, the country has witnessed the emergence of European Medical Drone in Gothenburg, a pioneering company preparing to launch medical drone operations using the G4 Aero 2 aircraft.

"It's a new thing for Sweden to see this type of operation," Nyroth explained, highlighting the transformative potential of these technological innovations. The country's technological landscape is further enriched by various innovative projects. Norshipping airport is collaborating with Aero EDIH to plan a long-range 160-kilometer unmanned aerial vehicle (UAV) flight to Visby on Gotland Island, demonstrating Sweden's commitment to exploring connectivity solutions for geographically challenging regions.

Companies like Kookie Jar are developing scalable, modular vertiports to simplify and reduce the cost of integrating advanced air mobility services in urban settings, while Jetson, a Swedish eVTOL manufacturer, has already sold out its entire production for 2024 and 2025. Public sentiment in Sweden presents an intriguing blend of technological curiosity and practical innovation.

The City of Stockholm and Schista Science City are collaborating on the City AAM project, which aims to integrate drone operations into urban environments through innovative approaches. A notable example is a project using drones to herd geese away from beaches - a creative solution that demonstrates both technological utility and environmental consideration. "People accept that we're going to have a drone on the beach to help keep the water clean," Nyroth noted, highlighting the growing public acceptance of drone technologies.

However, challenges remain. Regulatory frameworks are still evolving, and infrastructure compatibility presents complex considerations. Nyroth emphasized the ongoing discussions about drone deployment, such as identifying suitable rooftop locations and anticipating technological changes in the coming decades. Investment funding and regulatory clarity continue to be significant hurdles in the advanced mobility ecosystem. Upcoming events like the Drone International Expo in Schista and the Aero EDIH drone event provide critical platforms for showcasing technological advancements and fostering industry dialogue. Nyroth's presentation painted Sweden not just as a technological innovator, but as a thoughtful, strategic contributor to the global advanced mobility landscape - a country committed to sustainable, community-driven solutions that prioritize accessibility and environmental consciousness.

LIECHTENSTEIN

LIAISON: **NOEL STIERLIN**

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Liechtenstein's AAM ecosystem is characterized by its precision, collaborative approach, and strategic focus on medical and logistical applications. The country's first implementation of drone-based medical transport in 2023, conducted in collaboration with Jetsi and Dr. Rich laboratory, demonstrates a targeted approach to mobility innovation. As a member of the European Union Aviation Safety Agency (EASA), Liechtenstein benefits from comprehensive regulatory frameworks that enable sophisticated technological implementation while maintaining stringent safety standards.

"We are trying to further implement drones, especially in the medical field," Stierlin explains, highlighting the nation's strategic approach to mobility technologies. The country's compact size becomes an advantage rather than a limitation, allowing for focused and efficient drone implementations. Projects are emerging that leverage drone technologies for laboratory sample transportation, blood product transfers, and innovative solutions for mountainous and remote regions. Collaborations with Austrian partners to develop drone corridors for mountain and ski resort access showcase the creative potential of this approach.

Public sentiment in Liechtenstein reflects a remarkably progressive attitude towards drone technologies, particularly in medical contexts. While noise concerns persist, especially around landing and takeoff areas, the community demonstrates a remarkable openness to technological innovation. Stierlin's presentation to the Prince of Liechtenstein, who has shown significant investment in scientific progress, further underscores the national commitment to cutting-edge mobility solutions.

"THE BIGGEST CHALLENGE WE FACE IS SEAMLESSLY INTEGRATING THESE DRONES INTO EXISTING MEDICAL WORKFLOW, ESPECIALLY WITHIN LABORATORIES."

The most significant challenge remains seamlessly integrating drone technologies into existing medical workflows, particularly within laboratory environments. Stierlin's research has been instrumental in addressing these challenges, with scientific publications demonstrating the viability of drone transportation for medical samples. Studies have confirmed minimal pre-analytical impacts during drone transportation, a critical consideration for medical applications. By meticulously documenting CO2 reduction potentials and real-life distance savings, Stierlin's work provides empirical validation for drone-based medical mobility solutions.

TURKEY

LIAISON: **AHMET BIBER**

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Turkey's advanced air mobility ecosystem is distinguished by significant developments in both the public and private sectors. The country's aerospace industry, led by companies like Turkish Aerospace Industry (TAI) and Bicar, is making substantial strides in developing vertical takeoff and landing (VTOL) technologies. Bicar's VTOL aircraft, named Jazeri, and Air Car's two-person VTOL represent critical milestones in the nation's technological development. These efforts are not isolated technological experiments but part of a broader national strategy to position Turkey as an innovative player in aerospace technologies.

The defense and aerospace sectors have been particularly transformative, with notable achievements that extend beyond traditional military applications. In a landmark development, Turkey successfully controlled an unmanned aerial vehicle (UAV) from a manned aircraft, symbolizing the sophisticated integration of autonomous and piloted technologies. The acquisition of Pageo Aerospace, a 140-year-old Italian aviation company, further demonstrates Turkey's strategic approach to technological expansion and international collaboration. Private sector engagement has been crucial in driving technological innovation. Numerous companies are developing UAVs for diverse applications, ranging from agricultural monitoring to medical logistics and natural disaster response. Agriculture has emerged as a particularly promising sector, with drones becoming increasingly integral to farming practices. The government has been supportive, creating an environment that encourages technological experimentation and development.

Public sentiment and technological awareness are being cultivated through significant public events like Techno Fest, a technology festival that has seen remarkable growth in participation. In 2024, the event attracted 1.6 million competitors and 1.9 million visitors, indicating a strong public interest in technological innovation. These platforms not only showcase technological capabilities but also build public understanding and excitement about emerging mobility technologies.

"MOST OF THE PRIVATE SECTOR COMPANIES ARE FOCUSING ON DEVELOPING UAVS AND USING UAVS IN DIFFERENT SECTORS, SUCH AS DEFENSE, AGRICULTURE, MEDICAL AND NATURAL DISASTER FIELDS. TURKEY STARTED WITH DEFENSE, BUT NOW DRONES ARE MOSTLY USED IN AGRICULTURE HERE."

Despite these advances, challenges remain. Regulatory frameworks are still evolving, and public acceptance continues to be a work in progress. The civil aviation authority is actively formulating regulations to accommodate UAV operations, signaling a proactive approach to technological integration. Upcoming events like the Transport Aircraft Trading Conference and the Istanbul Air Show in 2025 will provide further platforms for discussion, collaboration, and technological showcasing.

SPAIN

LIAISON: **LUIS LIRA**

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The industrial milestones in Spain are particularly noteworthy, with several groundbreaking developments in electric and hydrogen-powered aircraft technologies. Boletaire and Er Nostron airlines are pioneering European efforts in hydrogen-powered electric aircraft, developing prototypes that promise to revolutionize regional aviation. Another exciting development is the work of Double Tail Electric Aviation, a Spanish startup developing short-range electric aircraft in the Andalusia region - an area rapidly emerging as a critical hub for aircraft development and manufacturing in Europe.

Major collaborative initiatives are driving Spain's advanced mobility ecosystem. The WELCOME project, supported by the European Union, represents an ambitious effort to integrate drones, airplanes, and helicopters into urban airspace for emergency missions. Additionally, the Spanish Innovative Mobility cluster (CIANO) is set to launch a white paper on innovative air mobility, bringing together stakeholders from Spain and other European countries to create a comprehensive vision for future mobility technologies.

Lira emphasized Spain's strategic approach to integrating advanced technologies like drones and eVTOLs to address urban mobility, logistics, and sustainability challenges. The country is actively developing U-space corridors in collaboration with Spanish airports, creating safe integration frameworks for drone operations in controlled airspaces.

"INNOVATIVE AIR MOBILITY REPRESENTS A TRANSFORMATIVE SHIFT IN TRANSPORTATION,"

Public sentiment in Spain presents a nuanced landscape. While there is limited awareness about advanced mobility technologies, the potential for innovation generates cautious optimism. Lira noted that many Spaniards are unfamiliar with these technologies, resulting in neutral sentiments. However, this also presents an opportunity for education and public engagement. Concerns about noise, safety, and privacy coexist with a growing recognition of the potential benefits in improving efficiency and sustainability across various sectors.The regulatory environment in Spain is evolving, with the Ministry of Transport issuing preliminary guidelines for certifying urban eVTOL operations. The government has developed a strategic plan for sustainable mobility, investing in aircraft electrification and U-Space corridor development. These efforts are supported by Next Generation EU funds, specifically targeting green hydrogen and aircraft electrification projects.

Lira's presentation painted Spain not just as a technological adopter, but as an active innovator in the advanced mobility ecosystem. Through strategic partnerships, government support, and a commitment to sustainable technologies, Spain is positioning itself as a key player in the global transformation of transportation technologies.

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OMAN


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ISRAEL


TUNISIA


SOUTH AFRICA


BOTSWANA


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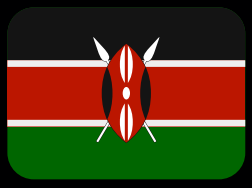
KENYA


NAMIBIA


ANGOLA


MOROCCO

“Advanced Air Mobility is poised to revolutionize transportation in the Middle East and Africa (MEA), offering innovative solutions to urban & smart congestion and enhancing regional connectivity. As regional coordinators, our role is to foster collaboration among MEA nations, aligning efforts to develop unified airspace regulations and infrastructure. By sharing knowledge and best practices, we aim to accelerate the integration of AAM technologies, ensuring safe and efficient operations across the region. We will start with Joby and Archer Aviation this year in UAE and with EHang last year in KSA. Also and we are working to achieve the role for manufacturers here for all big companies.”

RA’AD SHEHADEH
REGIONAL COORDINATOR

TANZANIA

LIAISON: **ROSE FUNJA**

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Tanzania's approach to drone integration demonstrates a carefully orchestrated balance between innovation and practical application, with significant support coming from international partnerships. The African Development Bank, in collaboration with the Korean African Economic Cooperation, has launched pilot projects specifically focused on agricultural drone applications, representing a strategic alignment with the country's economic priorities. The private sector has shown remarkable initiative, with several companies pioneering their first drone systems and working on integration with air traffic management systems. This development is particularly significant as it represents indigenous technological growth rather than mere adoption of external solutions.

The regulatory framework, while still evolving, showspromising signs of progress, with Beyond Visual Line of Sight (BVLOS) regulations launched just last year. This regulatory advancement has created new opportunities for expanded drone operations while maintaining necessary safety protocols. Public sentiment towards drone technology has been notably positive, particularly in the agricultural sector where practical benefits are most evident. The government's support for agricultural applications has helped create a foundation of public trust that could facilitate broader acceptance of advanced air mobility solutions.

"TANZANIA IS RAPIDLY EMERGING AS A HUB FOR DRONE TECHNOLOGY, ATTRACTING INTERNATIONAL COLLABORATIONS LIKE THE RECENT GERMAN DELEGATION VISIT. WHILE DJI REMAINS DOMINANT, THIS PRESENTS A MARKET RIPE FOR NEW AAM MANUFACTURERS AND TECHNOLOGY PROVIDERS TO CONTRIBUTE TO THE REGION'S EVOLVING AIR MOBILITY LANDSCAPE."

The presence of active drone users has led to the establishment of Tanzania's first Drone User Conference, marking a significant step in community building and knowledge sharing. The recent delegation visit from Germany seeking collaborators indicates growing international recognition of Tanzania's potential in the AAM space.

While most current drone operations utilize off-the-shelf solutions, primarily DJI products, this presents an opportunity for market entry by new manufacturers and technology providers. The aviation authority has modernized its processes, transitioning from manual to online systems for permits and importation approvals, significantly streamlining the administrative aspects of drone operations.

JORDAN

LIAISON: **RA'AD SHEHADEH**

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"WE ARE FOCUSED ON TRYING TO IMPROVE SKILLS AND DEVELOP OUR MARKET BY THE YOUTH HERE IN JORDAN. WE BELIEVE THAT EVERYTHING WILL BECOME BETTER. WE ARE MOVING WITH THE WORLD, LOOKING TO OUR FUTURE AND HOW TO MAKE PROJECTS ECO-FRIENDLY AND SUSTAINABLE."

Jordan is strategically positioning itself at the intersection of innovation and practical implementation in the aviation sector. A significant milestone marking this commitment was the establishment of the Jordanian National Council for Future Technology, which held its inaugural meeting in early 2025. This institutional foundation represents Jordan's systematic approach to fostering technological advancement in the aviation sector. The academic landscape has seen remarkable progress with the expansion of IEEE Aerospace and Electronic Systems Society (AESS) branches across four major universities, including the University of Jordan and Amman Arab University.

This academic integration demonstrates Jordan's commitment to building a strong educational foundation for future aviation professionals. A groundbreaking achievement in practical implementation was the successful completion of the first drone flight over Queen Alia International Airport, conducting mapping missions for runway inspection and maintenance. This milestone operation showcased Jordan's capability to safely integrate unmanned aircraft into complex airspace environments.

Shehadeh emphasized the country's ambitious initiative to train 100,000 Jordanian remote pilots using augmented reality (AR) and virtual reality (VR) technology, representing one of the largest such programs globally. The establishment of new aviation training facilities, including the FAST Aviation Training Center in Khalda and collaboration with the International Intercontinental Aviation Academy based in Larnaca, further strengthens Jordan's position as a regional hub for aviation education.

A particularly noteworthy achievement has been Jordan's ranking as 27th globally in cybersecurity and first in the region, highlighting the country's commitment to building secure and reliable aviation infrastructure. The focus on youth engagement emerged as a central theme, with Shehadeh highlighting that 81% of engineers in Jordan demonstrate exceptional academic performance, scoring above 82% in their fields. This emphasis on developing young talent is further supported by the College of Aviation Science at Amman Arab University, which offers bachelor's degrees in various aviation fields and maintains asophisticated drone laboratory for practical training. The Crown Prince Foundation and the Civil Aviation Regulatory Commission have provided crucial support for these initiatives, ensuring alignment between educational programs and industry needs.

SAUDI ARABIA

LIAISON: **WALID MESKINE**

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Saudi Arabia's journey in advanced air mobility began strategically in 2020, with early investments that signaled the country's long-term commitment to technological innovation. Jimco's participation in Joby Aviation's funding round and Neom's joint venture with Helicopter Form to develop the country's first operating air mobility services demonstrated a forward-thinking approach. The national airline's pre-order of 100 eVTOLs from Lilium in 2024 further underscored the kingdom's serious investment in this emerging technology.

The government's approach extends beyond mere technological acquisition, focusing on creating a comprehensive ecosystem for advanced mobility. The General Authority of Civil Aviation (GACA) has been instrumental in supporting these initiatives, providing specific flight authorizations, facilitating aircraft registration, and supporting navigation certifications. A particularly compelling use case emerged in the medical sector, with plans to leverage drone technology during the annual Hajj pilgrimage - a complex logistical challenge involving up to 2 million people in a concentrated area. Research and development have become a critical focus, with four universities competing to develop innovative solutions in advanced mobility. The government recently launched a significant fund of over 20 million Saudi Rials to support research in smart city technologies and air mobility, inviting both local and international researchers to contribute to this technological frontier. This approach reflects a holistic strategy of not just adopting technology, but actively developing and shaping it.

The regulatory framework represents another crucial aspect of Saudi Arabia's advanced mobility strategy. GACA is actively developing comprehensive regulations, with a particularly exciting development being an Unmanned Traffic Management (UTM) program that will initially cover Saudi Arabia, Oman, and Qatar. This collaborative approach extends to international partnerships, with the country engaging with regulatory bodies from the United States, UnitedKingdom, Singapore, South Korea, France, and China to exchange technological expertise and best practices. The country's advanced mobility vision encompasses multiple scenarios, from luxury transportation in high-infrastructure areas to critical medical supply delivery in challenging terrains. By considering diverse use cases, Saudi Arabia is positioning itself as a flexible and innovative leader in the global advanced mobility landscape.

"HERE WE REMARK THAT ALL OF GOVERNMENT AUTHORITIES AND INVESTMENT COMPANIES ARE AWARE THAT THE NEAR FUTURE IS FOR ADVANCED AIR MOBILITY. THAT'S WHY, WHEN BUSINESSES MOVE HERE IT PROVES THAT THIS MARKET IS VERY PROMISING, ESPECIALLY IN SAUDI ARABIA, WITH THE FULL SUPPORT FROM THE LOCAL GOVERNMENT TO MOVE FORWARD TO DEVELOP THIS INDUSTRY."

RWANDA

LIAISON: **CYNTHIA ISIMBI**

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The cornerstone of Rwanda's technological ecosystem is Zipline, a groundbreaking medical delivery network that has fundamentally transformed healthcare access, particularly in rural areas. This initiative exemplifies how advanced mobility technologies can address critical infrastructure challenges, bringing life-saving medical supplies to remote communities with unprecedented efficiency. In 2022, Rwanda took another significant step by launching an unmanned operations management system (UTM) in partnership with a French company, demonstrating a commitment to developing a sustainable and safe traffic management framework for aerial operations.

"We are trying to develop a guidance material for new entrants in the higher airspace in the stratosphere to provide internet connectivity for remote areas," Isimbi explained, highlighting Rwanda's forward-thinking approach to technological integration. The country is actively collaborating with technical leaders to enhance communication and navigation capabilities, creating an environment that welcomes and supports innovative service providers while simultaneously developing robust policy frameworks.

Public sentiment in Rwanda reflects a nuanced understanding of technological potential. Success stories from Zipline have generated widespread recognition, with drone usage increasingly viewed as a symbol of innovation that bridges infrastructure gaps and enhances emergency response capabilities. However, Isimbi was transparent about existing challenges, acknowledging concerns around privacy and noise. The national strategy has been to address these concerns through comprehensive public education, emphasizing how advanced mobility technologies can improve efficiency and security.

Upcoming events like the African Drone Forum in Kigali and Aviation Africa provide crucial platforms for showcasing Rwanda's technological advancements and engaging with international stakeholders. These events represent more than mere conferences; they are strategic opportunities to demonstrate Rwanda's commitment to technological innovation and collaborative development.

"RWANDA INVITES STAKEHOLDERS TO PARTNER IN SHAPING A FUTURE OF SUSTAINABLE AND TECHNOLOGY-DRIVEN AVIATION. WE'RE TRYING TO FOCUS ON DEVELOPING A SAFE TRAFFIC MANAGEMENT SYSTEM TO ALLOW INTEGRATION AND OPERATIONS IN THE AIRSPACE."

Isimbi's conclusion was both an invitation and a vision: "Rwanda invites stakeholders to partner in shaping a future sustainable and technology-driven aviation." This statement encapsulated the country's approach - not merely adopting technologies, but actively co-creating a technological ecosystem that serves broader societal needs. By prioritizing transparency, public engagement, and a commitment to safer drone technologies, Rwanda is positioning itself not just as a recipient of technological innovation, but as a global leader in reimagining mobility and connectivity.

UAE

WASSAF AKHTAR

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The United Arab Emirates (UAE) is emerging as a global leader in Advanced Air Mobility through strategic investments, regulatory advancements, and pioneering projects in eVTOLs, drone technology, and vertiport infrastructure. With a commitment to sustainability and innovation, the UAE is developing an integrated aerial mobility ecosystem. Under the leadership of the UAE General Civil Aviation Authority (GCAA), it now boasts a comprehensive AAM national infrastructure.

Joby Aviation applied for UAE certification in September 2024 to operate commercial air taxi services, complying with aviation regulations, training personnel, and establishing operational facilities—a key step towards eVTOL passenger services. Air Chateau is completing a 3000 m^2 MRO hangar for eVTOLs in Dubai. The facility, equipped with advanced technology for battery maintenance, software updates, and airframe repairs, will reduce downtime and boost eVTOL adoption. Drones are increasingly vital in the UAE's security, logistics, and emergency sectors. Government initiatives have trialed drone deliveries for medical supplies and last-mile logistics. Keeta Drones has successfully conducted BVLOS trials in Dubai for e-commerce and medical supplies. Dubai's air navigation stakeholders are investing in Uncrewed Traffic Management (UTM) systems to enhance airspace safety and efficiency amid growing UAV integration. The UAE has begun mapping air corridors and developing regulations for piloted and autonomous air taxis and cargo drones, marking a leap towards redefining urban transportation. In partnership with the GCAA, ATRC, TII, and ASPIRE, these aerial routes will connect key airports and landmarks, easing congestion and setting a global benchmark for urban mobility. The corridors and regulations are expected to be defined within the next 20 months.

THE UAE'S STRATEGIC VISION FOR AAM, BACKED BY REGULATORY SUPPORT AND TECHNOLOGICAL INNOVATION, POSITIONS THE COUNTRY AS A LEADER IN AERIAL MOBILITY. WITH INVESTMENTS IN EVTOLS, DRONE LOGISTICS, AND VERTIPORT INFRASTRUCTURE, THE UAE IS PAVING THE WAY FOR THE FUTURE OF SUSTAINABLE URBAN AIR TRANSPORTATION."

These developments illustrate the UAE's rapid evolution in Advanced Air Mobility. By combining certifications, infrastructure investments, and regulatory innovations, the nation is poised to set new standards in urban transportation. With government and private sector collaboration, the UAE drives forward initiatives that reduce congestion, enhance safety, and foster sustainable growth. These efforts bolster the country's status as a global AAM hub and pave the way for transformative aerial mobility solutions in urban landscapes.

His Excellency Saif Mohammed Al Suwaidi, Director General of the GCAA said: "Air corridor mapping for piloted and autonomous air taxis and drones is a crucial milestone that will enable the seamless implementation of Advanced Air Mobility into the UAE's infrastructure. This initiative ensures the safe and efficient adoption of air mobility, delivering transformative solutions to urban transport and paving the way for a smarter, more connected future."

OMAN

FAHAD AL RIYAMI

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The country has achieved notable milestones in indigenous drone development, marked by the launch of the first Omani-made Star drones and plans for the nation's first commercial drone factory. A transformative partnership between US-based Odis Aviation and Oman's public transport company Mwasalat will initiate eVTOL logistics trials in 2025, representing a significant step toward integrating advanced air mobility into the national transportation infrastructure. Companies like Sbar and Ibn Farnas Drone Center are already implementing UAS solutions in critical sectors, particularly energy and agriculture, utilizing both commercial drones and beyond visual line of sight aircraft. The software development sector has also gained momentum, with local companies creating sophisticated traffic management systems and surveillance applications for UAS management.

Oman's regulatory environment, led by the Civil Aviation Authority, has evolved to comprehensively cover operations, use cases, training, licensing, and certification. The Omani government, through various ministries including Transport, Agriculture, and Commerce, actively supports AAM and UAS initiatives through both government-led trials and private sector partnerships. Community acceptance of these technologies is growing, particularly in the tourism sector, where the government sees significant potential for accessing challenging locations. This aligns with the country's economic diversification goals and its broader sustainability objectives under Oman Vision 2040.

However, challenges remain, particularly regarding noise pollution, with concerns about increased noise in areas beyond airports. The Civil Aviation Authority is actively developing noise abatement procedures, though their application to UAM and UAS aircraft remains under development. Integration with existing airspace poses additional challenges, alongside general privacy and safety concerns about AAM and UAS technology. These issues are being addressed through evolving policies and increased public familiarization with the technology through regular operations.

"THE OUTLOOK FOR AAM AND UAS IN OMAN IS EVOLVING WITH NOTABLE MILESTONES ACHIEVED AND PROMISING OPPORTUNITIES ON THE HORIZON. IT'S NOT WITHOUT ITS CHALLENGES THOUGH, AS REGULATION IS MATURING GRADUALLY TO ADDRESS THESE CONCERNS. LOOKING AHEAD, WE EXPECT MORE ANNOUNCEMENTS FROM BOTH THE GOVERNMENT AND PRIVATE SECTORS IN THE NEAR FUTURE, AND THE UPCOMING FIRST-OF-ITS-KIND DEDICATED AAM EVENT IN OMAN WILL BE A SIGNIFICANT MILESTONE FOR THE REGION'S DEVELOPMENT."

UGANDA

NALULE MARY SANDRA

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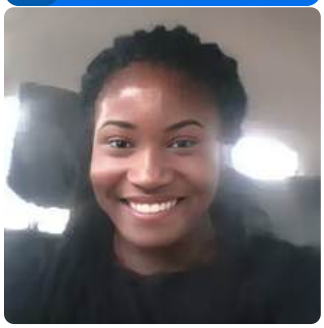

"THE FUTURE OF AAM IN UGANDA IS PROMISING, AND THE ONGOING EFFORTS WILL UNDOUBTEDLY CONTRIBUTE TO THE COUNTRY'S OVERALL PROGRESS AND DEVELOPMENT. "

Uganda stands at the forefront of embracing Advanced Air Mobility (AAM) technologies, showcasing promising developments in various sectors. However, it is currently considered to be in the early stages of exploring AAM possibilities, with no concrete plans or ongoing projects publicly announced. As of 2025, Uganda, home to approximately 53 million people, is investigating how to integrate drone technology into essential industries. Although AAM is not operational yet—meaning no commercial services are using electric vertical take-off and landing (VTOL) aircraft for passenger transport—there is potential for significant benefits, especially in connecting remote areas and improving transportation infrastructure. This will require substantial regulatory frameworks and infrastructure development.

As of 2024, a significant partnership was established between local stakeholders and Unlimited Webex, aiming to enhance the nation's military and industrial capabilities. This collaboration included establishing a comprehensive workshop and a cutting-edge research and innovation centre. The centre was expected to play a pivotal role in developing new technologies and attracting investment opportunities within the country. Drones are already making a substantial impact in Uganda's healthcare sector. These drones deliver medical samples to the western districts, highlighting the technology's potential to revolutionise healthcare delivery in remote and underserved areas. Regulatory frameworks have been established to govern the safe and secure operation of drones. Since 2022, Uganda has adopted laws covering aspects such as licensing, registration, and operational guidelines. These regulations are designed to promote safety while encouraging the growth of the drone industry.

Environmental impact assessments have become mandatory, ensuring that drone operations are conducted sustainably. The taxation of drone services is another area of focus aimed at generating revenue while fostering industry growth.

Public sentiment towards drone advancements in Uganda is overwhelmingly positive, with growing interest in learning about drone technologies. This enthusiasm is evident in discussions around AAM technologies, indicating a promising future for the industry. Looking ahead, Uganda is set to expand drone applications, particularly in medical deliveries and disaster relief. Ongoing projects, such as surveying and pipeline monitoring, highlight the versatility of drones across various sectors. The country is also actively seeking investment and partnership opportunities to further advance its AAM initiatives as well as Establish necessary regulations and airspace management systems for AAM operations.

In conclusion, Uganda's journey towards integrating advanced air mobility technologies is marked by collaboration, innovation, and a commitment to sustainable development. As the nation continues to explore and adopt these technologies, the potential for economic growth and improved infrastructure is immense.

ISRAEL

EYAL ZEHAVI

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"ISRAEL IS A LEADING BETA SITE FOR ADVANCED AIR MOBILITY. WE ARE VERY OPEN FOR INNOVATION: WE EXPERIENCE HEAVY TRAFFIC, AND THE DISTANCES ARE RELATIVELY SHORT, SO USING AERIAL TRANSPORTATION IS VERY ATTRACTIVE."

Eyal Zehavi, CEO and founder of ATI, brings a seasoned perspective to Israel's advanced air mobility landscape, combining over 30 years of aviation industry experience with a computer science and AI background. As a pilot and drone operator, Zehavi represents technological expertise and practical implementation, offering a comprehensive view of Israel's remarkable journey in unmanned aerial technologies and urban mobility solutions.

Israel's advanced mobility ecosystem is characterized by decades of extensive research and development, earning the country its reputation as a global technology incubator. Often referred to as the "Start-up Nation," Israel has cultivated a robust environment of innovation that extends far beyond simple technological experimentation. The country boasts numerous local manufacturers and operators who have developed sophisticated unmanned aerial systems ranging from small personal drones to large-scale commercial applications. Local innovation is exemplified by companies like Air One, a local eVTOL manufacturer producing a double-seater electric aircraft that has already achieved flight experience and secured international clients. The ecosystem is further strengthened by two significant UTM (UAS Traffic Management) companies that have developed advanced command and control software, gaining both local and international certifications and operational experience. Drone delivery companies have been operationally active for several years, conducting extensive trials both domestically and internationally.

The Israeli government and regulatory bodies have played a crucial role in supporting this technological evolution. The Civil Aviation Authority has been proactive, recently adopting EASA prototype specification guidelines for vertiports and establishing a dedicated vertiport task force. A particularly innovative initiative is the Israeli National Drone Initiative (INDI), a consortium involving multiple governmental bodies that has invested 20 million dollars to support technological development. This program has facilitated over 25,000 flight sorties, including remarkable achievements like 70-kilometer beyond visual line of sight flights and medical supply deliveries between hospitals.

Public sentiment in Israel is notably receptive to technological innovation. The dense urban environments and the population's natural inclination towards early technology adoption create a favorable landscape for advanced mobility solutions. Municipalities are increasingly supportive, recognizing the potential of drone technologies for various urban applications, including surveillance, agriculture, and emergency services. However, challenges remain. While public openness is high, convincing people of the immediate affordability and accessibility of these technologies continues to be a demanding process. The upcoming events like the UVID Drone-tech Conference and the World Conference of Unmanned, Remote, and Autonomous Vehicles (URAV) provide critical platforms for continued dialogue, demonstration, and public education.

TUNISIA

MOHAMED MEJDI SAID

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Tunisia's AAM ecosystem is currently in its nascent stages, with a primary focus on developing foundational technological capabilities. The country has demonstrated particular strength in computer vision technologies, specifically in drone detection and avoidance systems, through collaborative efforts between universities and research laboratories. Strategic international partnerships, such as the project with the African Development Bank and Korean African Economic Cooperation, have been instrumental in driving initial drone applications, particularly in agricultural contexts.

"WE ARE STILL IN OUR FIRST STEPS OF TECHNOLOGICAL INNOVATION BUT WE ARE COMMITTED TO DEVELOPING OUR CAPABILITIES SYSTEMATICALLY AND STRATEGICALLY."

The regulatory landscape in Tunisia presents both opportunities and challenges for AAM development. Currently, drone operations remain restricted to specific areas, with ongoing legislative processes aimed at creating comprehensive frameworks for integration. Public sentiment toward drone technologies is generally positive, though significant concerns persist regarding security, privacy, and potential misuse. These concerns have prompted a cautious approach to technological implementation, with careful consideration given to potential societal implications.

Technological applications are currently concentrated in specific sectors, with notable developments in pipeline surveys, particularly in desert regions, and agricultural monitoring. These initial use cases provide critical learning opportunities and help build public confidence in drone technologies. Said's own research contributes to this developmental trajectory, focusing on separation management systems using artificial intelligence and the U-space framework, which represents a sophisticated approach to drone traffic management and integration.

The broader vision for Tunisia's AAM future extends beyond immediate technological implementation. Academic institutions and research laboratories are playing a crucial role in developing the necessary human capital and technological expertise. By fostering collaboration between universities, government agencies, and international partners, Tunisia is positioning itself to participate meaningfully in the global AAM ecosystem. Said's work exemplifies this approach, bridging theoretical research with practical technological development and creating pathways for more comprehensive mobility solutions.

SOUTH AFRICA

LIAISON: **LOUISE JUPP**

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Louise Jupp has emerged as a key figure in South Africa's Advanced Air Mobility sector, where she has been instrumental in driving the development of drone and UAV initiatives, particularly through the Western Cape Government's innovative sandbox program. Her work has focused intensively on the integration of Unmanned Aircraft Systems (UAS) into South Africa's airspace, laying crucial groundwork for future advanced air mobility developments. Under her guidance, South Africa has taken a methodical approach to developing its regulatory framework, prioritizing safe integration and practical testing methodologies.

Jupp has been particularly focused on establishing clear value propositions for AAM within the South African context, recognizing the unique challenges and opportunities presented by the region's geography and economic landscape. Her work encompasses both current drone operations and future AAM initiatives, with a strong emphasis on safety and regulatory compliance.

Despite limited specific AAM initiatives currently in place, Jupp has identified significant opportunities for regional connectivity and infrastructure development. Her approach to development includes a strong focus on integrating with existing aviation infrastructure, ensuring that new technologies complement and enhance current systems rather than replacing them.

She has also championed the development of testing facilities, recognizing their crucial role in advancing the industry while maintaining safety standards. Jupp's vision for South Africa's AAM future emphasizes practical, sustainable development that addresses real regional needs while building public trust and understanding. Her work continues to balance technological advancement with regulatory requirements, creating a framework that supports innovation while ensuring safety and reliability.

"WE NEED TO HAVE A CLEAR VALUE PROPOSITION HERE IN SOUTH AFRICA, NOT JUST FOLLOW WHAT OTHERS ARE DOING. OUR UNIQUE CHALLENGES REQUIRE UNIQUE SOLUTIONS, AND THAT'S WHAT WE'RE WORKING TOWARDS."

Through her leadership, South Africa is developing a comprehensive approach to AAM integration that considers both immediate practical applications and long-term strategic goals, positioning the country as a potential leader in African aviation innovation. Her emphasis on developing clear testing protocols and safety standards has been particularly influential in shaping regional approaches to AAM integration. Additionally, Jupp has been instrumental in fostering collaborations between government agencies, private sector partners, and academic institutions, creating a robust ecosystem for AAM development in South Africa. Her work in public engagement has helped build understanding and support for drone technologies, particularly in applications that directly benefit local communities.

BOTSWANA

LIAISON: **MARANG MBAAKANYI**

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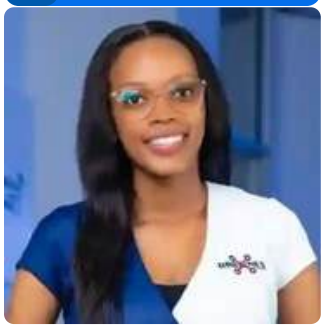

"OUR SUCCESS STORIES HAVE COME FROM THE DRONES FOR HEALTH INITIATIVE THAT HAS SIGNIFICANTLY REDUCED DELIVERY TIMES FOR ESSENTIAL MEDICAL SUPPLIES TO REMOTE AREAS."

With a population of approximately 2.4 million and a GDP of 21.9 billion US dollars, Botswana is emerging as a promising hub for technological advancement in the region, particularly in the realm of drone and mobility technologies. The country's technological milestones are particularly impressive in the domain of artificial intelligence and drone applications. Botswana has been actively developing AI-driven technologies for autonomous navigation, precision mapping, and traffic management systems.

The government has taken a proactive approach, partnering with various stakeholders to integrate drone technology into critical sectors such as land surveying, agriculture, and public services. A particularly innovative initiative has been the government's drone-powered agricultural programs, which demonstrate a forward-thinking approach to technological integration in traditional industries. Regulatory frameworks in Botswana reflect a nuanced understanding of technological potential balanced with careful governance. The Civil Aviation Act provides a comprehensive legal framework for aviation activities, including unmanned aerial operations. In a move that signals both innovation and social consciousness, the Civil Aviation Authority introduced a policy in August 2024 offering a 50% reduction in drone licensing fees for individuals aged 35 and below, strategically encouraging youth participation in the aviation sector.

Beyond healthcare, drones have proven invaluable in wildlife monitoring and anti-poaching efforts, showcasing how technological innovation can directly contribute to environmental conservation and national security. Public sentiment in Botswana presents an interesting narrative of cautious optimism. While initial concerns about surveillance and data security exist, the practical demonstrations of drone technologies in critical sectors like healthcare and wildlife protection have gradually shifted public perception. Local communities have actively participated in drone initiatives, such as constructing landing pads for medical delivery drones, indicating a grassroots level of acceptance and engagement.

The country's outlook is ambitious. Botswana aims to become a regional leader in UAS adoption, leveraging its supportive regulatory environment and growing public acceptance. Opportunities for economic growth are significant, with potential expansions in agriculture, mining, and logistics sectors. However, challenges remain, including limited understanding of drone technology and insufficient support infrastructure like drone charging stations and UTM networks. Akaini's presentation painted Botswana not just as a recipient of technological innovation, but as an active participant and potential leader in the advanced mobility ecosystem, demonstrating how emerging economies can strategically position themselves in the global technological landscape.

D.R. CONGO

LIAISON: **DJIFERDIN MENDES MASUDI**

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The development of AAM (Advanced Air Mobility) in a Democratic Eepublic of the Congo is in full expansion, marked by significant milestones, regulatory progress and increasing acceptance of the public. AAM, which encompasses autonomous air vehicles and drones for the transport of passengers and goods, is perceived as a catalyst for modernization of transport and a way to overcome the challenges linked to the land transport infrastructure in the Republic of Congo of Congo.

The first stages of AAM in DRC focus mainly on pilot projects in Kinshasa. In 2024, the DRCongo launched the first pilot project for the use of drones in the delivery of drugs in distant regions, an initiative in partnership with local and international companies. Kinshasa, is directed towards the development of drone technologies for freight transport, medicines.
In addition, Kinshasa has shown great interest in advanced air mobility technologies, with a commitment to test electric air vehicles. The development of AAM in the Democratic Republic of Congo is based on national and continental regulation in terms of air security, air space management and privacy. The Civil Aviation Authority of the DRC (RVA) and the Organization of International Civil Aviation (OACI) play a crucial role in the harmonization of standards in terms of safety and certification of air vehicles.

The DRC wants to be among African pioneers in drone regulation, with a legal framework allowing tests, efforts are underway to establish specific directives on the commercial use of drones and air taxis, but the development of executive regulatory remains a challenge.

Acceptance of AAM by the Congolese public varies depending on the awareness and profits received. The advantages of AAM, such as reduction in congestion, fast delivery in rural areas, and carbon - free transport, have been widely recognized. However, concerns related to security, confidentiality and environmental impact remain. Awareness initiatives are in place, in particular in Kinshasa, to better inform citizens of the advantages of these technologies. For example, educational campaigns and public forums have been organized in several cities to familiarize the population with technological innovations in urban aviation.

“ALTHOUGH THE AAM INDUSTRY IN THE DRC IS STILL IN THE DEVELOPMENT PHASE, IT PROGRESSES RAPIDLY THANKS TO INTERNATIONAL COLLABORATIONS, REGULATORY ADVANCES AND THE GROWING ADOPTION OF THESE NEW TECHNOLOGIES, WHICH COULD TRANSFORM TRANSPORT IN THE CONTINENT. “

ESWATINI

LIAISON: **SIMPHIWE ZACHEAUS MASEKO**

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The state of Eswatini is working towards Advanced Air Mobility (AAM systems of transport) as of the beginning of 2025. Eswatini has focused on developing air transport infrastructure and services. In this context, it is worth mentioning the re-establishment of Eswatini Airways which had been defunct for more than 20 years. This is being done with the hope to enhance regional air transport for the Southern African Development Community (SADC) region.

In regard of other regulatory developments, the Eswatini Civil Aviation Authority (ESWACAA) is the main authority responsible for all aviation activities in the country. Although regulations for AAM have not been developed yet, the directorate of flight safety and quality control of ESWACAA conducts supervision of all types of aviation operations, including general aviation, medical air rescue, and aviation training centers. This perfunctory arrangement could be expanded in the future to include AAM systems.

There are also ongoing efforts to venture into AAM alongside other unmanned technology and vertical take-off and landing (VTOL) vehicles within the region's airspace. The coordination on these efforts is being undertaken by the International Civil Aviation Organization (ICAO), which has been more proactive in trying to establish safe and efficient frameworks for international cooperation on AAM systems.

"ENGAGEMENT WITH INTERNATIONAL REGULATORY FRAMEWORKS AND REGIONAL PARTNERS WILL BE CRUCIAL AS THE COUNTRY CONTEMPLATES INTEGRATING AAM INTO ITS TRANSPORTATION ECOSYSTEM."

Public acceptance of AAM in Eswatini is still in its infancy, primarily due to limited exposure and awareness of these emerging technologies. As the global AAM landscape evolves, there will be opportunities for Eswatini to engage in public education initiatives to foster understanding and acceptance of AAM solutions. In summary, while Eswatini has not yet embarked on specific AAM projects, the foundational elements within its aviation sector provide a platform for future exploration.

MALAWI

LIAISON: **TADALA MAKULUNI**

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Malawi's journey in AAM has been marked by strategic international collaborations and indigenous innovation, with the African Drone Academy serving as a cornerstone for developing skilled drone pilots and operators across multiple sectors, including healthcare, delivery services, and agriculture. The presence of major international companies like Wingcopter and Swoop Aero, alongside local innovators such as Micro Make, demonstrates the country's ability to attract both global and domestic investment in the sector. Micro Make, which began operations in 2018, has achieved the notable distinction of manufacturing drones locally in Malawi, focusing on delivery applications.

"THE FUTURE OF UAVS IN MALAWI IS HUGE AND IT'S GOING TO BE ONE OF THE CORNERSTONES FOR SUSTAINABLE DEVELOPMENT IN OUR COUNTRY. EVERYTHING IS ONLY POSSIBLE IF THERE'S A COMMERCIALLY VIABLE BUSINESS AROUND IT. AS SOMEONE WHO IS WORKING IN THE DRONE INDUSTRY, WHAT I'M LOOKING FOR THE MOST ARE THE COLLABORATIONS THAT CAN BE THERE WITHIN DIFFERENT ORGANIZATIONS, INTERNATIONALLY, AND ALSO IN LOCAL STATES, TO BE ABLE TO EXPAND THE INNOVATIONS THAT WE HAVE ALREADY STARTED. WE CAN MAKE THIS INCLUSIVE FOR YOUNG PEOPLE AS WELL AS WOMEN."

The emergence of Wild World Drone Discoveries in the surveillance sector and Farming and Engineering Link Services in agricultural applications showcases the diversity of drone applications taking root in the country. Government support has been instrumental in fostering this growth, with authorities demonstrating remarkable openness to new technologies and creating pathways for both international and local organizations to thrive.

The regulatory environment, while still evolving, benefits from easy interaction with the Department of Civil Aviation for licensing and notifications. The Kasungu drone testing corridor, operational for approximately five years, has become a vital facility for companies to validate their drone services before full deployment. This infrastructure has attracted numerous stakeholders, including international organizations like the World Bank, UNICEF, and wildlife conservation groups. A particularly encouraging aspect of Malawi's AAM development is the emergence of young leaders championing these technologies, establishing their own companies across various sectors from agriculture to deliveries. However, Makuluni highlighted a significant challenge: the absence of formally accepted regulations, as the current framework awaits government and High Court approval. This regulatory limbo creates a situation where drone operations lack comprehensive oversight, potentially impacting the sector's orderly development.

NIGERIA

PHILIPS DUROJAIYE

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Over the past year, Nigeria has made significant improvements in Advanced Air Mobility (AAM) and drone technology. Here are some key developments
In September 2024, Nigeria's Minister of Aviation and Aerospace Development, Festus Keyamo, led a delegation to the International Civil Aviation Organisation's (ICAO) inaugural Advanced Air Mobility Symposium in Montréal, Canada. The event focused on innovative concepts such as electric vertical take-off and landing (eVTOL) aircraft and airspace integration.

Keyamo emphasized Nigeria's readiness to collaborate with global partners to integrate these technologies into the national aviation system. Nigeria currently has less than 16 licenses for the flight of drones within its airspace, and these have been granted to Multi-Million Dollar companies and conglomerates.

In a bid to open up the ecosystem further, the Nigerian Civil Aviation Authority (NCAA) and other coordinating agencies are granting clemency to drone operators who have otherwise been operating Illegally (the clampdown was selectively enforced) and offering pathways to granting waivers for small operations and licensing for much bigger operations.
TerraHaptix's Drone Factory: In early 2024, TerraHaptix, a Nigerian robotics startup, inaugurated a 15,000-square-foot drone manufacturing facility in the Capital City of Abuja.

The factory aims to produce autonomous drones for sectors including defense, energy, logistics, agriculture, and mining, with a target of manufacturing 100,000 drones annually by 2030.
Defence Space Administration's Drone Development: In November 2024, Nigeria's Defence Space Administration (DSA) began developing various surveillance and armed drones, including models like the AYBARS-II and ADAN 70.

"THE ECOSYSTEM IS DEVELOPING RAPIDLY, AND PUBLIC ACCEPTANCE IS GROWING. ADVANCED AIR MOBILITY WILL CHART A NEW COURSE FOR LIFE IN THE REGION AS THE FUTURE WE'RE BUILDING MIGHT NOT HAVE PAVED ROADS."

This initiative underscores Nigeria's commitment to enhancing its defense capabilities through indigenous drone technology. The Ecosystem is developing rapidly, and public acceptance is growing. Nigeria is one of the biggest economies in Africa, with a vast landscape that is poorly interconnected and unexplored. Advanced Air Mobility will chart a new course for life in the region.

KENYA

CLEOPA OTIENO

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A watershed moment in Kenya's AAM development occurred with the launch of the Konza Technopolis drone corridor, representing a significant government commitment to advancing unmanned aerial technology. This dedicated airspace serves as a controlled environmentwhere unmanned aerial service providers can extensively test and develop concepts and systems, providing a crucial foundation for the country's AAM advancement. The initiative demonstrates Kenya's strategic approach to fostering innovation while maintaining safety standards. Significant partnerships have emerged, including a notable collaboration with EHang for corridor testing scheduled to begin in the second quarter of this year.

"THE DRONE INDUSTRY IS EXPANDING RAPIDLY WITH APPLICATIONS ACROSS AGRICULTURE, ENERGY, PUBLIC SAFETY, E-COMMERCE AND MOBILITY SECTORS. THE OUTLOOK IS QUITE POSITIVE IN RELATION TO WHAT I'VE MENTIONED. I THINK THE GOVERNMENT IS PROVIDING AN OPPORTUNITY FOR DRONES TO PLAY A KEY ROLE IN THE ECONOMY. DIFFERENT SECTORS ARE ALREADY MAKING USE OF THIS, AND WE HAVE PLAYERS IN AGRICULTURE, SEARCH AND RESCUE, CARGO DELIVERY AMONG OTHERS, REALLY STARTING OFF ACTIVITIES AND PROGRAMS."

Additionally, partnerships with transponder solutions manufacturers are helping advance electronic conspicuity concepts, addressing the critical challenge of safely integrating drones into national airspace. The regulatory landscape continues to evolve, with drone regulations established in 2020 now undergoing revision to address operational costs and drone categorization challenges.

A particularly promising development is the implementation of a UAS Management system, which has streamlined operations by allowing operators to request and pay for services through a digital platform, significantly reducing previous manual processing times. The government has shown strong support through various initiatives, including tax exemptions on unmanned aerial systems and accessories, demonstrating a commitment to fostering industry growth.

The drone industry has seen remarkable expansion, with over 40 companies now registered and operating. However, challenges persist, particularly in beyond visual line of sight (BVLOS) operations. While companies like Zipline and Wingcopter have received proof of concept clearance for BVLOS operations, the approval process remains lengthy and has caused some potential operators to withdraw from the market. The presence of illegal operators poses an ongoing challenge, potentially stemming from strict drone laws and insufficient public awareness about regulatory benefits.

NAMIBIA

VIRGINIE UWIMANA

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The UAV industry is experiencing significant growth, with increased involvement from both government and academia. More Approved Training Organizations (ATOs) are emerging, leading to a rise in the number of licensed drone pilots. Additionally, drone applications in precision agriculture and land degradation monitoring are gaining traction.

A key milestone in the industry is the shift from manned aviation to drones for airborne gravity surveys. This transition was emphasized at the Innovative Approaches to Sustainable Mineral Exploration 2024 event, where experts like René Forsberg (Technical University of Denmark) and Ari Saartenoja (Radai, Finland) demonstrated how drone technology is revolutionizing the sector.

In regulatory advancements, the Executive Director of the Namibia Civil Aviation Authority (NCAA), Toska Sem, was elected as Vice President for the Southern Region of the African Civil Aviation Commission (AFCAC) Bureau. She will serve a three-year term, reinforcing Namibia's role in shaping the future of civil aviation in Africa.

Public sentiment toward drones has improved significantly, with growing acceptance driven by awareness campaigns. Both the NCAA and organizations like Flying Labs Namibia have played a crucial role in educating the public on drone technology and its benefits.

"THE INDUSTRY IS POISED FOR CONTINUED GROWTH, WITH DRONES PLAYING AN INCREASINGLY VITAL ROLE ACROSS VARIOUS SECTORS."

Looking ahead, the Innovative Approaches to Sustainable Mineral Exploration 2025 event is set to further explore advancements in drone applications within the mining sector. The industry is poised for continued growth, with drones playing an increasingly vital role across various sectors.

ANGOLA

CUSTÓDIO MONTEIRO SABÃO

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Advanced Air Mobility in Angola has made significant progress, reflecting the country's commitment to innovation and sustainable development in the aviation sector. In November 2023, Angola inaugurated the Dr. António Agostinho Neto International Airport, located about 40 km southeast of Luanda. This airport, designed to accommodate large aircraft such as the Airbus A380, has the capacity to handle 15 million passengers annually and is equipped with two parallel runways and three terminal buildings. The infrastructure aims to boost international and regional connectivity, facilitating the transport of passengers and goods.

On the regulatory front, the National Civil Aviation Authority (ANAC) has played an active role in promoting AAM. In September 2024, ANAC participated in the First Advanced Air Mobility Symposium, where topics such as legal compliance, eVTOL aircraft, vertiports, and airspace integration were discussed. This event emphasized the importance of international collaboration and regulatory adaptation for the successful implementation of AAM in Angola. Additionally, Angola has reinforced its commitment to progress and innovation in civil aviation. In February 2025, the country participated in an international event of the International Civil Aviation Organization (ICAO), gathering over 1,500 participants, including representatives from ICAO's 193 member states, ministers, leaders, and specialists in the fields of transport, aviation, and energy.

"ANGOLA'S PURSUIT OF ADVANCED AIR MOBILITY UNDERSCORES ITS DEDICATION TO TECHNOLOGICAL INNOVATION, SUSTAINABLE DEVELOPMENT, AND ENHANCED AIR TRANSPORT INFRASTRUCTURE, DRIVING ECONOMIC GROWTH AND SOCIAL PROGRESS THROUGH STRATEGIC INVESTMENTS AND INTERNATIONAL COLLABORATION."

During this event, the Angolan minister highlighted the importance of aviation for Angola's economic and social development, emphasizing three key areas: Economic Diversification and Growth, Infrastructure Development, and Human Resources Capacity Building.

These initiatives reflect Angola's commitment to integrating Advanced Air Mobility into its development strategy, promoting technological innovation, sustainability, and improved air transport infrastructure. Active participation in international forums and the implementation of advanced infrastructure projects demonstrate the country's determination to position itself as a regional leader in civil aviation.

MOROCCO

KANGNI COMBEY

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While AAM remains a relatively new concept for the country, Morocco is making significant strides through strategic partnerships, infrastructure development, and a forward-thinking approach to sustainable aviation. The Moroccan AAM ecosystem is characterized by calculated and strategic international collaborations. In December 2023, a pivotal agreement was signed between the Moroccan government and Safran, a long-standing partnership dating back to 1999, focusing on sustainable aviation and local component manufacturing. The Marrakesh Air Show in October 2024 further demonstrated Morocco's commitment, with the nation signing an agreement with Embraer to develop commercial aviation, expand regional transportation, and focus on decarbonization efforts. "We are trying to be a leader in hydrogen fuel production and biofuel technologies," Combey explains, highlighting the country's ambitious approach to sustainable mobility solutions.

"MOROCCO SIGNED A NEW AGREEMENT BETWEEN EMBRAER IN BRAZIL TO DEVELOP COMMERCIAL AVIATION, TO EXPAND THE ECOSYSTEM INTEGRATION TO REGIONAL TRANSPORTATION, USING RAM SOLUTIONS. IN MOROCCO WE WILL FOCUS ON DECARBONIZATION AND PRODUCING MORE SUSTAINABLE FUEL."

Morocco's approach to AAM extends beyond mere technological implementation, encompassing comprehensive ecosystem development. The government is actively working to adapt international AAM safety regulations to the national framework, with significant investments in education and training to develop future industry leaders.

The emergence of numerous UAV companies operating in agriculture, surveillance, and various other sectors underscores the nation's growing technological capabilities. Cities like Casablanca, facing significant traffic congestion, present prime opportunities for innovative mobility solutions, with traffic times often extending to hours during peak periods. Public sentiment in Morocco reflects a mixture of excitement and cautious curiosity. While there is enthusiasm about the potential for faster, more efficient, and eco-friendly transportation systems, significant concerns remain about air congestion, safety, and community integration.

Public awareness campaigns, such as the "Morocco's Role in Global Electro-Mobility Revolution" initiative, aim to educate and inform the population about the advantages and potential of advanced mobility technologies. Infrastructure and regulatory development are crucial components of Morocco's AAM strategy. The country is investing in industry zones to attract external companies and leveraging its geographical position to create a conducive environment for technological innovation. Upcoming events like the GTS Africa conference and the International Conference on Aerospace in Marrakesh demonstrate Morocco's commitment to positioning itself as a key player in the global AAM ecosystem. Combey's own research at the International University of Rabat focuses on innovative propeller design, specifically addressing noise reduction challenges that have been significant barriers to widespread AAM adoption.

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GUATEMALA

“Advanced Air Mobility will not only transform our cities but also drive economic growth and environmental sustainability. Its development must be accompanied by clear regulations and active collaboration between industry and governments. Latin America has the opportunity to learn from global leaders and adapt best practices to foster a more sustainable and innovative future.”

PAULA VELANDIA CONGOTE
REGIONAL COORDINATOR

BRAZIL

LIAISON: **FERNANDA DE MELO SINISCALCHI**

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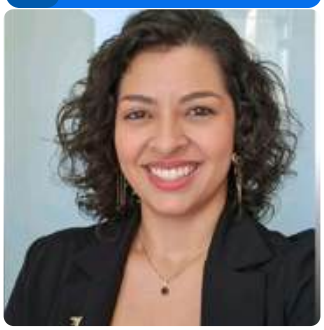

The Brazilian advanced mobility landscape is distinguished by three primary manufacturers, each addressing different technological niches that reflect the country's diverse economic and geographical challenges. Moya Aero focuses on logistics and agribusiness applications, while Eve Air Mobility and Vertical Connect concentrate on passenger transportation solutions. These vehicles demonstrate remarkable capabilities, with range capacities spanning 100 to 300 kilometers and payload capacities between 200 and 400 kilograms - specifications that underscore Brazil's commitment to developing practical, scalable aerial mobility solutions.

The regulatory environment in Brazil has shown particularly promising developments, with the national aviation authority ANAC implementing strategic initiatives that facilitate technological innovation. A significant milestone was the launch of a regulatory sandbox for vertiports and a Memorandum of Understanding with Singapore, signaling Brazil's intention to position itself as a collaborative player in the global Advanced Air Mobility ecosystem. The country has also achieved notable regulatory breakthroughs, including the first permanent exemption for drone operations above people and the publication of a National Urban Air Mobility Concept of Operations (ConOps) by DECEA.
Public sentiment in Brazil offers a uniquely receptive technological landscape. "Brazilians are very attracted to new technologies," Siniscalchi noted, highlighting a cultural openness that provides fertile ground for advanced mobility innovations. This receptivity is actively cultivated through strategic educational initiatives, with organizations like Flying Labs introducing students to drone and Advanced Air Mobility technologies through workshops and training programs. Local companies like Moya Aero are taking proactive approaches, sponsoring Aerodesign competitions, student programs and facilitating technical visits that build early ecosystem engagement.

"THE OUTLOOK IS STRONG. WE HAVE A VERY ROBUST PRIVATE SECTOR WITH KEEN INTEREST IN INTRODUCING NEW OPERATIONS AND ALSO A VERY GOOD CIVIL - MILITARY COORDINATION IN SUPPORT OF THESE ACTIVITIES. THE WAY FORWARD IS THROUGH PARTNERSHIP BETWEEN SCIENCE AND INDUSTRY."

Looking forward, Brazil's Advanced Air Mobility trajectory appears marked by cautious optimism and strategic development. The upcoming Expo eVTOL in São Paulo represents a critical platform for showcasing technological capabilities and fostering international collaboration. With anticipated flight tests of full-scale prototypes and ongoing development of vertiport infrastructure, Brazil is positioning itself as a potentially significant player in the global AAM landscape.

COLOMBIA

LIAISON: **PAULA VELANDIA CONGOTE**

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In the context of the latest Advanced Air Mobility (AAM) Forum, significant progress has been made in Colombia during 2024, particularly in Medellín. The city has emerged as a focal point for AAM advancements through a strategic agreement between Aeronáutica Civil, the Olaya Herrera Public Airport Establishment, Local goverment and AAM enthusiasts, including the liaison from the Institute. This collaboration aims to create a robust foundation for the integration of Urban Air Mobility (UAM) into the city's infrastructure.

Medellín has set an ambitious roadmap for AAM, with implementation phases beginning in 2025 and an estimated launch of eVTOL flights by 2030. This timeline challenges the city to advance its future development plans, infrastructure expansion, and integration of the community. Stakeholders must collaborate on urban planning, air traffic management, and public engagement strategies to ensure a seamless transition. By proactively addressing these challenges, Medellín aims to position itself as a leader in urban air mobility, setting a precedent for other cities looking to adopt this transformative technology.

One of the key milestones was the active participation of the aviation community in the CADA Forum, held in Cali. This event gathered industry leaders, regulators, and experts to discuss the future of AAM in Colombia. Notably, Dan Grande Sloat, Founder of the Institute, played a crucial role in fostering discussions on regulation, infrastructure, and investment opportunities in emerging aviation technologies.

"THE CONTRIBUTIONS OF AAM REPRESENTATIVES AND ENTHUSIASTS IN EACH COUNTRY ARE INVALUABLE IN SHAPING THE INDUSTRY'S FUTURE. THEIR DEDICATION AND COLLABORATION ARE CRUCIAL FOR ENSURING THE SAFE, DIGNIFIED, AND RELIABLE DEVELOPMENT OF AAM. WE ENCOURAGE ALL STAKEHOLDERS TO CONTINUE WORKING TOWARDS A SUSTAINABLE AND INNOVATIVE AVIATION ECOSYSTEM THAT BENEFITS EVERYONE."

From a regulatory perspective, Aeronáutica Civil has intensified efforts to attract international manufacturers. A prime example is the recent visit by ARCHER, a leading eVTOL manufacturer, which engaged with Colombian regulators to understand the legal framework and establish a timeline for commercialization. This visit highlights the country's potential as a key player in the global AAM market and underscores the government's commitment to fostering innovation in urban air mobility.

Another significant development is the designation of a test flight zone in the department of Boyacá. Led by the national aviation authority, this initiative aims to evaluate core UAM and Urban Traffic Management (UTM) components. These tests will not only validate new technologies and operational procedures but also promote the growth of the national AAM industry, positioning Colombia as a leader in the region.

DOMINICAN REP.

LIAISON: **RAFAEL DICKSON MORALES**

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The Dominican Republic has made remarkable strides in advanced air mobility, demonstrating a strategic approach to drone technology and regulatory frameworks that positions the nation as an emerging leader in the field. In a landmark achievement that symbolizes the country's technological ambition, the Dominican Institute of Civil Aviation granted a groundbreaking certification to the Pension Fund Manager in February 2024. This authorization allows the company to operate an air corridor along one of the main city avenues, specifically dedicated to documentation delivery using drones. The 1.4-kilometer project is more than just a technological milestone; it represents a bold reimagining of urban logistics and transportation infrastructure.

The Dominican Republic has expanded its international aviation partnerships, notably signing a comprehensive Skies Agreement with the U.S. in August 2024. This agreement removes restrictions on routes and frequencies, fostering increased airline competition and creating new opportunities for economic growth in the aviation sector. This strategic move positions the country as a progressive player in global aviation.

The country's technological advancements extend far beyond mere implementation, showcasing a holistic approach to integrating unmanned aerial technologies. In July 2024, the Dominican Republic achieved a critical humanitarian milestone with its first drone authorization for blood delivery. A successful network flight transported medical supplies from a national police general hospital, highlighting the potential of drone technology to revolutionize emergency and medical logistics.

"The regulator is more open to exploring new projects of advanced mobility," Dickson Morales noted, emphasizing the government's proactive stance. Legislative evolution is equally crucial to these technological advances. The country is actively updating its aviation laws to ensure consistency with international standards, with the Civil Aviation Institute developing comprehensive new regulations for advanced air mobility. Plans to make these regulations available for public discussion in the third trimester of the year underscore a transparent and collaborative approach to technological integration. "Updated regulation can serve as a model for other countries looking to adapt similar solutions," Dickson Morales highlighted, revealing the potential broader impact of the Dominican Republic's innovative regulatory framework.

"THE DOMINICAN REPUBLIC HAS MANY OPPORTUNITIES. FIRST OF ALL, BECAUSE THE SKIES AGREEMENT PROVIDES A PLATFORM TO SPUR COMPETITION AND STRENGTHEN INVESTMENT, I THINK IT POSITIONED DR AS A KEY PLAYER IN THE GLOBAL AVIATION MARKET."

While celebrating these achievements, Dickson Morales was also candid about the challenges ahead. Ensuring public trust, developing necessary infrastructure like landing points and charging stations, and addressing safety concerns remain critical focus areas. These challenges, however, are viewed not as obstacles but as opportunities for continued growth and innovation in the advanced air mobility sector.

UNITED STATES

MARILYN PEARSON

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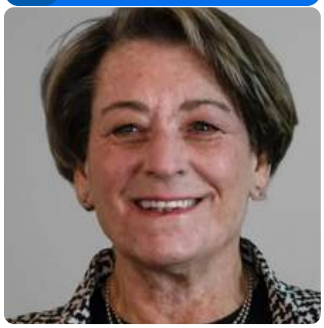

The U.S. AAM ecosystem in 2025 is characterized by simultaneous technological promise and public perception challenges. Recent incidents, including mysterious drone sightings on the East Coast and a drone-related interference during California wildfire operations, have significantly impacted public sentiment. "Public perception can shift quickly," Pearson observes, "and these incidents underscore the critical importance of transparent communication and demonstrable safety in emerging mobility technologies." These events have temporarily dampened public enthusiasm, requiring industry stakeholders to redouble efforts in public education and trust-building. Regulatory developments represent a critical aspect of the U.S. AAM landscape. The FAA is actively working on comprehensive frameworks for powered lift aircraft, developing special federal aviation regulations that will guide the industry's next decade. These regulations introduce innovative approaches to pilot training and certification, including provisions for single-seat, single-control aircraft training utilizing advanced simulators.

"THE DIFFERENCE BETWEEN THE US AND OTHERS IS THAT WE HAVE THE CATEGORY CALLED POWERED LIFT, WHICH MEANS THAT YOU NEED TO TAKE A CHECK RIDE FOR 3 DIFFERENT RATINGS: THE COMMERCIAL POWERED LIFT, THE INSTRUMENT POWERED LIFT, AND THE TYPE RATING FOR EACH AND EVERY AIRCRAFT."

The regulatory framework demonstrates a nuanced understanding of technological evolution, allowing for adaptive guidelines that can be modified as more operational data becomes available.

Technological advancements in eVTOL (electric Vertical Takeoff and Landing) aircraft are progressing rapidly, with the first certification expected potentially by late 2025 or early 2026. Significant research is being conducted in areas like hydrogen propulsion, with companies like Joby conducting impressive flight tests covering substantial distances. The U.S. is also focusing on developing robust infrastructure, with considerable partnerships emerging around vertiport design and implementation. Universities are increasingly offering specialized programs and research opportunities in AAM, signaling a long-term commitment to developing the necessary technological and human capital.

Pearson's personal involvement extends beyond her professional role, encompassing leadership positions in multiple international aviation committees. Her work with organizations like the FAA International G-35 for modeling, simulation, and training, and her participation in rulemaking teams for eVTOL pilot licensing, demonstrates the United States' commitment to collaborative, global AAM development. By bridging regulatory frameworks, technological innovation, and international cooperation, Pearson and her colleagues are helping shape a future where advanced air mobility becomes a safe, efficient, and transformative transportation paradigm.

ARGENTINA

DIEGO GONZALEZ

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The Argentine advanced mobility ecosystem in 2024 presents a fascinating study of potential versus immediate capability. The drone industry has shown remarkable growth, with usage in critical sectors like agriculture doubling compared to the previous year, indicating a rapidly expanding technological appetite. However, the broader advanced air mobility landscape remains largely conceptual, characterized more by potential than current implementation. "The great news in Argentina came from the new government of Milei, who decided to support urban air mobility through a new regulation," Gonzalez explained, highlighting the critical role of governmental support in technological transformation.

The regulatory environment in Argentina reflects a complex developmental stage, where enthusiasm and potential coexist with significant infrastructural challenges. The civil aviation authority has been primarily focused on maintaining its international categorization, which has limited the immediate focus on advanced mobility technologies. Gonzalez candidly acknowledged this challenge, suggesting that 2025 might be the year when the newly introduced decree begins to take practical shape, with potential stakeholder engagement and initial regulatory frameworks being developed.

"THE GREAT NEWS IN ARGENTINA CAME FROM LAST YEAR WITH THE NEW GOVERNMENT'S DECISION TO SUPPORT ADVANCED AIR MOBILITY THROUGH REGULATION. THIS IS POSITIVE, BUT IT'S JUST THE VERY, VERY BEGINNING - WE NEED TO BUILD FROM HERE."

The broader implications of this regulatory shift extend beyond mere technological implementation. Gonzalez's perspective, rooted in his legal expertise, emphasizes the critical importance of establishing comprehensive legal frameworks that can support emerging technologies. The Worldwide Airport Lawyer Association's upcoming legal forum, which will discuss urban mobility from a legal perspective, represents a crucial platform for addressing the complex regulatory challenges that accompany technological innovation.

"We know that the legal framework is challenging, but it's time to start discussing these new laws," Gonzalez noted, capturing the forward-looking spirit of technological legal adaptation.

CANADA

BRIE O'SULLIVAN

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Canada has made substantial progress in its AAM framework, particularly with the anticipated Part 2 of proposed RPAS and eVTOL amendments to Canadian Aviation Regulations. O'Sullivan has been actively involved in several groundbreaking initiatives, including the inaugural ICAO AAM Symposium 2024, which drew over 1,700 participants from 87 nations, demonstrating Canada's growing influence in the global AAM landscape. Her work has contributed to the launch of H2CanFly, a federal non-profit consortium dedicated to hydrogen aviation, highlighting Canada's commitment to sustainable aviation technologies.

O'Sullivan has been particularly focused on the development of BVLOS operations through the IART Alliance Project, while also supporting the expansion of drone delivery projects at Edmonton International Airport. Her research has revealed promising public acceptance rates, with 39.4% of Canadians expressing willingness to use air taxis. Through her work with Transport Canada, she has helped establish a strong regulatory foundation while emphasizing the importance of hydrogen-based aviation technologies. O'Sullivan's approach to AAM integration has been particularly noteworthy in its focus on indigenous communities' healthcare needs, demonstrating the practical applications of drone technology in addressing real-world challenges. While acknowledging challenges such as regulatory timeline uncertainties, public education needs, and weather considerations, she has maintained a pragmatic approach to infrastructure development.

Her vision for Canada's AAM future emphasizes sustainable aviation solutions while prioritizing practical applications like medical delivery and remote community service. O'Sullivan has also been instrumental in developing partnerships between academic institutions, government agencies, and private sector stakeholders, creating a robust ecosystem for AAM innovation.

"WE ARE FOCUSING ON HYDROGEN-BASED AVIATION TECHNOLOGIES BECAUSE WE BELIEVE IT'S CRUCIAL FOR SUSTAINABLE DEVELOPMENT. WORKING WITH INDIGENOUS COMMUNITIES HAS SHOWN US THE REAL POTENTIAL OF MEDICAL DELIVERY DRONES TO TRANSFORM HEALTHCARE ACCESS."

Her work continues to bridge the gap between research and practical implementation, particularly in addressing the unique challenges faced by Canada's remote communities. Additionally, her research in Madagascar has provided valuable insights into the potential of drone technology in diverse geographical and social contexts, enriching Canada's approach to AAM development and implementation.

MEXICO

HECTOR RIDA OLVERA

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The Mexican advanced mobility scenario in 2024 presents a nuanced narrative of technological curiosity tempered by infrastructural limitations. While the country has not experienced explosive technological growth, several notable developments demonstrate emerging capabilities. Entertainment and exhibition sectors have emerged as unexpected pioneers, with companies like 6 Flags utilizing drone technologies extensively for shows and demonstrations. Pilot programs in medical supply delivery, particularly in remote northern regions, hint at the potential transformative capabilities of advanced mobility technologies. "There are just pilot programs happening here in Mexico," Olvera candidly explained, capturing the experimental nature of the current technological landscape.

“THERE IS A LACK OF UNDERSTANDING ON HOW TO MOVE FORWARD WITH THE TECHNOLOGY, BUT THERE HAVE BEEN SOME MOVING FORWARD THINGS ABOUT THE VIRTUAL REALITY SYSTEM THAT THEY ARE USING TO ENCHANT SEVERAL SYSTEMS.“

The regulatory environment represents perhaps the most significant challenge to advanced mobility development in Mexico. Olvera highlighted a critical gap between technological potential and institutional understanding, noting a fundamental lack of governmental education about emerging technologies.

The national aviation authority, Senia, has made notable investments—purchasing 11 verification system drones at a substantial cost of two million dollars—yet these investments have not yet translated into comprehensive technological integration. "There is a lack of understanding on how to move forward with the technology," Olvera observed, encapsulating the institutional hesitation that characterizes Mexico's current advanced mobility approach.

Public sentiment reveals a complex technological reception, simultaneously curious and cautious. While there is growing public interest in drone technologies, with increasing numbers of individuals acquiring personal drone systems, significant concerns persist about regulatory frameworks and airspace infrastructure. The absence of comprehensive regulatory mechanisms creates a challenging environment for technological adoption, with potential safety and operational uncertainties limiting broader implementation. Looking forward, Mexico's advanced mobility trajectory appears defined by strategic potential rather than immediate implementation. Upcoming events like Expo Drones in 2025 and mobility-focused conferences in various cities represent critical platforms for technological demonstration and public engagement. Olvera sees particular promise in the "near-shoring" opportunity, suggesting that Mexico's well-educated technical workforce could position the country as an attractive location for advanced mobility component manufacturing and development.

CHILE

KASANDRA LEIVA

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The Chilean advanced air mobility ecosystem is characterized by a unique multi-institutional governance model, with three distinct governmental bodies playing critical roles in aerial technology development. The Civil Aeronautics Board manages air commerce policy, the Civil Aviation Directorate handles regulatory and investigative functions, and the Directorate of Airports oversees infrastructure development. This intricate institutional framework represents both a challenge and an opportunity for technological integration, requiring sophisticated inter-ministerial coordination and strategic vision.

The journey towards advanced mobility in Chile has been methodical and deliberate, tracing a careful path of institutional engagement and strategic planning. The process began in 2021 with the Chilean Helicopter Association's initial presentations to the Ministry of Transport, laying crucial groundwork for future developments. By 2022, a pivotal moment emerged with the creation of a public-private working group led by the General Directorate of Civil Aeronautics, signaling a collaborative approach to technological exploration. "We are trying to understand the meaning of advanced air mobility and its potential implementation," Leiva explained, capturing the exploratory spirit driving Chile's approach. Looking forward, Chile's advanced mobility strategy focuses on comprehensive understanding and strategic preparation.

The first half of 2025 is dedicated to developing technical documentation and terms of reference for a comprehensive roadmap, emphasizing a methodical approach to technological integration. The working group's primary objectives extend beyond mere technological implementation, focusing on understanding potential societal and environmental impacts, creating collaborative networks, and building public knowledge and acceptance.

"THE PUBLIC-PRIVATE WORKING GROUP AND THEIR MEETINGS HAVE MADE IT POSSIBLE TO IDENTIFY THE IMPORTANCE OF UNDERSTANDING ADVANCED AIR MOBILITY AS WELL AS ITS POTENTIAL FOR IMPLEMENTATION AND THE VARIOUS IMPACTS IT COULD HAVE ON THE ENVIRONMENT AND THE COMMUNITY."

Leiva's own professional background with Dronity.com underscores the broader ecosystem of technological support and education that accompanies Chile's advanced mobility developments. By providing professional training and advisory services for unmanned aerial vehicle projects, organizations like hers play a crucial role in building the human and institutional capacity necessary for technological transformation.

URUGUAY

LIAISON: **PABLO GUIGOU GRIOT**

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The Uruguayan advanced mobility ecosystem in 2024 presents a fascinating narrative of strategic incremental progress, characterized by targeted technological demonstrations and carefully managed regulatory approaches. Significant milestones include groundbreaking initiatives like People Brazil's demonstration flights in Montevideo and their strategic partnership with Drone Uy, an Uruguayan company. Perhaps most notably, Puerta del Sur achieved a landmark certification for safety surveillance using unmanned aerial vehicles within airport perimeters—a development that Griot highlighted as potentially pioneering in the regional context.

"We have over 500 agricultural drones operating across the country," he noted, emphasizing how agricultural sectors have become a primary driver of drone technology adoption. The regulatory landscape in Uruguay reflects a sophisticated approach of measured innovation, with civil aviation authorities working collaboratively with agricultural and technological stakeholders to create flexible yet structured frameworks. The Agriculture Ministry's increasing involvement in drone regulation, particularly for agricultural spraying operations, demonstrates a holistic approach to technological integration that considers both technological potential and operational safety. "We are working together with the Agriculture Ministry to establish tighter surveillance over sprayer UAVs," Griot explained, capturing the nuanced regulatory strategy that balances innovation with careful oversight.

"THE HOSPITAL LOGISTIC FLIGHT TESTS HAD GREAT PRESS COVERAGE AND BROUGHT PUBLIC ACCEPTANCE TO THE NEXT LEVEL IN THE COUNTRY. THE GENERAL ACCEPTANCE OF UAVS CAN LEAD TO A SMOOTH ENTRY OF THE AAM INDUSTRY."

Public sentiment presents a complex narrative of technological curiosity and pragmatic concern. While positive demonstrations like hospital logistics flight tests have generated significant media interest and public acceptance, challenges persist. Concerns about privacy, particularly regarding drone operations over private properties, and agricultural disputes about chemical spraying highlight the ongoing need for transparent communication and robust regulatory frameworks. Griot's perspective emphasizes the importance of building public trust through demonstrable utility and responsible implementation.

Looking forward, Uruguay's advanced mobility trajectory appears marked by strategic patience and selective technological engagement. The growing UAV market suggests a foundation for more comprehensive advanced mobility development, though significant infrastructure and regulatory challenges remain. "The UAV companies are on the rise across the country," Griot observed, "but the Advanced Air Mobility market remains a big question mark." This candid assessment reflects both the potential and the uncertainties that characterize Uruguay's technological mobility landscape.

PARAGUAY

LIAISON: **ANDREA SPINELLI**

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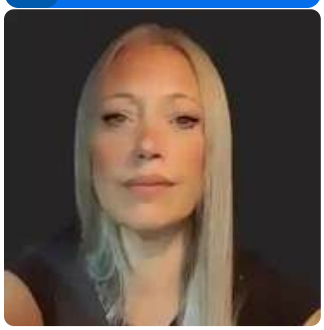

Paraguay's advanced mobility landscape in 2024 is characterized by cautious exploration and strategic military and governmental applications. The Paraguayan Navy's acquisition of Autel Evo Max 4 drones represents a significant milestone, demonstrating a focused approach to technological integration primarily centered on border control, monitoring, and emergency response capabilities. These drones are not merely technological acquisitions but strategic tools designed to enhance national security and operational capabilities across multiple governmental sectors, including customs and national police services.

"WHILE IN PARAGUAY OPINIONS ON DRONES ARE MIXED, WE'RE SEEING CLEAR COMMUNITY SUPPORT FOR THE POSITIVE USE OF THIS TECHNOLOGY. LAW ENFORCEMENT AND EMERGENCY SERVICES ARE SUCCESSFULLY USING DRONES FOR SEARCH AND RESCUE OPERATIONS, BORDER CONTROL, AND INTELLIGENCE TASKS."

The regulatory environment in Paraguay reveals a complex developmental stage, where technological potential coexists with institutional limitations. While DINAC (the national aviation regulatory body) implemented drone usage regulations in 2017, these frameworks remain incompletely enforced, creating a technological landscape marked by potential but constrained by regulatory ambiguity.

"We have regulations, but they are not fully enforced yet, " Spinelli candidly acknowledged, highlighting the critical gap between technological potential and institutional readiness that characterizes many developing nations' advanced mobility trajectories. Public sentiment in Paraguay presents a nuanced narrative of technological curiosity tempered by practical concerns. The population's perception of drone technologies oscillates between recognizing potential benefits—particularly in sectors like search and rescue, border monitoring, and combating illegal activities—and legitimate privacy concerns. The introduction of legislative bills addressing drone regulation since 2013 reflects this delicate balance, with citizens simultaneously fascinated by technological potential and cautious about potential invasive applications.

Spinelli's personal project, Águila Uno, embodies the broader educational and capacity-building approach necessary for technological transformation. By offering free training to public safety professionals and developing a remote pilot training program, the initiative represents a grassroots approach to technological capacity building. "We aim to enhance skills and effectiveness in various roles," Spinelli explained, capturing the fundamental philosophy of technological integration that sees advanced mobility not just as a technological challenge, but as a comprehensive societal transformation.

COSTA RICA

LIAISON: **FERNANDO NARANJO ELIZONDO**

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Costa Rica has demonstrated remarkable progress in advanced air mobility, particularly in the agricultural and technological sectors. In a groundbreaking initiative, the government invested approximately 1 million US dollars to distribute drones to 16 organizations supporting agricultural work. This investment directly impacted 41 small producers and potentially covered around 8,000 hectares across 23 primary crops. By updating regulations in January 2024, the country provided greater flexibility for drone equipment usage, thereby creating new economic development opportunities and expanding the functional capabilities of aerial work technologies.

"WE CONDUCTED, IN CONCERT WITH BLUENEST BY GLOBAVIA AT GUANACASTE AIRPORT (THAT IS PART OF DA VINCI AIRPORT AND RESERVE A CONCHAL HOTEL), THE FIRST REAL DEMONSTRATION FLIGHT IN LATIN AMERICA OF A PASSENGER INSIDE A VERTICAL TAKEOFF AND LANDING AIRCRAFT CARRIED OUT WITH THE EHANG 216 AIRCRAFT."

The country's commitment to advanced mobility extends beyond agricultural applications. In October 2024, Costa Rica hosted the second Latin American Congress on Electric Mobility, bringing together leaders from 20 countries to discuss strategies for transitioning to emission-free transportation.

This event underscored Costa Rica's role as a regional leader in sustainable mobility technologies. Perhaps most notably, the country achieved a significant milestone by conducting the first real demonstration flight of a vertical takeoff and landing aircraft in Latin America, featuring the EHANG 216 aircraft.

The demonstration flights, conducted in collaboration with BlueMobility Global Via and Guanacaste Airport, showcased the potential of advanced air mobility in tourism and transportation. Two specific flights were executed - one at Guanacaste Airport and another at the Reserva Conchal Hotel on the Pacific coast. These flights represented more than a technological display; they symbolized Costa Rica's vision of integrating innovative transportation solutions into its diverse and beautiful landscape.

By positioning itself at the forefront of advanced air mobility, Costa Rica is not merely adopting new technologies but strategically reimagining transportation infrastructure. The country's approach demonstrates a holistic understanding of mobility, considering environmental sustainability, economic development, and technological innovation as interconnected goals.

PERU

LIAISON: **KIMBERLY ROJAS RUIZ**

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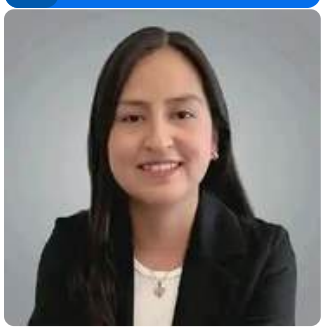

Peru has launched major environmental initiatives through SERNANP, utilizing drone technology to monitor and protect sensitive ecological areas more effectively than ever before. The country achieved a significant milestone with its historic cargo drone flight during the APEC forum, demonstrating the practical capabilities of drone technology in international commerce and logistics. The successful hosting of the first regional drone conference in Trujillo has positioned Peru as an emerging leader in regional drone development, facilitating knowledge exchange and fostering international collaboration.

"ALTHOUGH THERE IS A LOT OF INTEREST AND POTENTIAL TO DEVELOP HERE, WE NEED TO ENSURE SAFETY FIRST. WE NEED TO SHOW THAT IT'S A SAFE WAY, AND THAT IS THE BIGGEST CHALLENGE FOR ALL OF US HERE. BUT THERE IS HUGE OPPORTUNITY TO INCREASE ECONOMIC GROWTH AND GENERATE MORE JOB POSITIONS REGARDING TECHNOLOGY."

A cornerstone of Peru's aviation advancement has been the strategic partnership between Airbus and Ecocopter for new air mobility services, which promises to revolutionize transportation and logistics across the country.

Rojas has identified and actively pursued opportunities for remote area services, recognizing the potential of drone technology to connect previously isolated communities with essential services and resources. However, she maintains a pragmatic approach, acknowledging the significant challenges posed by infrastructure development needs and regulatory hurdles. Her comprehensive strategy includes a strong focus on public education, ensuring community understanding and acceptance of drone technology while highlighting the substantial opportunities in agricultural applications.

This emphasis on agricultural development is particularly significant given Peru's large agricultural sector and the potential for drones to improve farming efficiency and sustainability. Rojas's vision for Peru's drone ecosystem is both ambitious and practical, focusing on applications that provide tangible public benefits while ensuring sustainable development. Her work continues to bridge the gap between technological capability and practical implementation, particularly in remote areas and agricultural sectors, where the impact of drone technology can be most transformative.

GUATEMALA

LIAISON: **SERGIO PLAZA**

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"ELECTRIC AVIATION REMAINS COMMITED TO ADVANCING AAM IN CENTRAL AMERICA THROUGH COLLABORATION WITH GOVERNMENT BODIES AND KEY STAKEHOLDERS. ITS STRONG RELATIONSHIPS WITH REGULATORS, INCLUDING THE MINISTRY OF TOURISM AND MINISTRY OF HEALTH, POSITION THE COMPANY AS A TRUSTED PARTNER IN THE REGION."

The Electric Aviation company is at the forefront of developing Advanced Air Mobility in Central America, particularly in Guatemala, where it stands as the first mover in this emerging sector. The company has secured key partnerships with leading manufacturers like Jetson, Volocopter, and Lift, positioning itself as a key player in the region's sustainable transportation revolution with cutting-edge eVTOL (electric vertical takeoff and landing) technology.

The company's business model is multifaceted, focusing on tourism, medical transport, and cargo, with plans for future expansion into agriculture, mining, and more. This approach targets high-growth sectors that are crucial for improving mobility and allevia,ng conges,on in the region's densely populated areas. Electric Aviation has already made significant progress in securing regulatory approvals, with the Dirección General de Aeronáutica Civil (DGAC) in Guatemala and El Salvador already in the process.

Guatemala offers a prime opportunity for AAM with its robust aviation culture—ranking second globally for helicopters per capita—and its need for cost-effective transport solutions. The country's mountainous terrain and limited infrastructure make traditional transport methods challenging, creating a significant opportunity for eVTOLs to reduce travel, me and improve connectivity. Popular tourist destinations like Lake Atitlán and Antigua stand to benefit greatly from this innovation.

Electric Aviation remains committed to advancing AAM in Central America through collaboration with government bodies and key stakeholders. Its strong relationships with regulators, including the Ministry of Tourism and Ministry of Health, position the company as a trusted partner in the region. The company is currently working on securing the necessary permits to begin operations and is optimistic about AAM's future in Central America.

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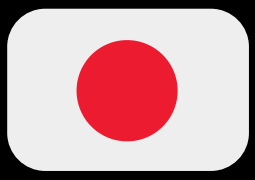
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SRI LANKA

“For the APAC market, especially Japan and South Korea are leading AAM initiatives with national programs and events like the Osaka Kansai World Expo starting from April 2025 and ongoing K-UAM Grand Challenge. While eVTOL OEMs like Joby, Archer, SkyDrive are quite active in these countries, there are still a lot of regulatory challenges which Civil Aviation Authority are working closely with authorities like FAA, EASA and ICAO. These initiatives will definitely have a positive and realistic impact on progress towards commercialization of AAM in the whole region.”

KEISUKE YASUKOCHI
REGIONAL COORDINATOR

JAPAN

LIAISON: **KEISUKE YASUKOCHI**

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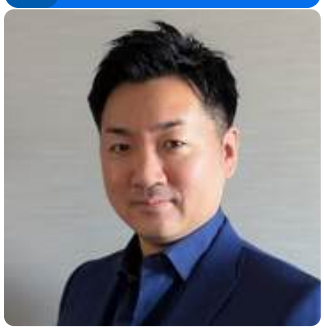

Japan is set to make a significant global statement with its upcoming World Expo in Osaka, scheduled from April to October 2025. This international event will serve as a critical showcase for advanced air mobility technologies, with four eVTOL manufacturers - including SkyDrive, Joby, Archer, and Botco Aerospace - planning demonstration flights. The expo represents more than just a technological display; it is a strategic platform to introduce the public to the potential of urban air mobility, especially after Volocopter's inability to demonstrate at the Paris Olympics.

"JAPAN'S GOVERNMENT IS PUSHING ADVANCED AIR MOBILITY IN THE COUNTRY AND TRYING TO ACCOMMODATE THOSE WHO WANTS TO ENTER THE MARKET."

The country's approach to advanced air mobility is characterized by strong collaborative partnerships between eVTOL manufacturers and established Japanese corporations. SkyDrive, for instance, is partnering with Kei Motor Corporation, while other manufacturers have formed alliances with major Japanese companies like Toyota, Rocket, and Sumitomo Corporation. These partnerships extend beyond mere technological development, representing a holistic approach to integrating advanced mobility solutions into Japan's economic and technological ecosystem. The Japanese Civil Aviation Authority (JCAB) is playing a proactive role in facilitating this technological transition.

By working closely with regulatory bodies like the FAA and EASA, Japan is developing a robust certification process that adapts existing aircraft regulations to the unique challenges of eVTOL technologies. This collaborative approach demonstrates Japan's commitment to creating a safe, standardized framework for advanced air mobility that can potentially serve as a model for other nations.

However, Japan's path is not without challenges. Dense urban environments like Tokyo and Osaka present significant infrastructure obstacles. Limited space for vertiports, complex downwash and outwash effects, and the need for specialized charging systems require innovative solutions. Additionally, public sentiment remains mixed, with concerns about noise pollution and environmental impact necessitating careful public communication and demonstration of the technology's benefits.

The country is actively working to address these challenges through multiple working groups focused on operations certification, infrastructure development, and public engagement. The upcoming Advanced Mobility Asia Symposium represents another critical platform for professionals to discuss implementation strategies and share insights across different regional contexts.

CAMBODIA

LIAISON: **JENNIFER MESZAROS**

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Cambodia's unique position within ASEAN (Association of Southeast Asian Nations) provides valuable context for understanding the country's potential in advanced air mobility. While Cambodia might not immediately spring to mind as a hub for aviation innovation, Meszaros illuminated how the nation's unique characteristics make it particularly well-suited for advanced air mobility development.

The country's liberal approach to foreign investment, combined with its export-oriented economy and numerous bilateral and multilateral trade agreements with major powers like Australia, China, the European Union, and the United States, creates a fertile ground for aviation advancement. Cambodia's demographic advantage stems from its relatively young population, who demonstrate strong English literacy and embrace technological innovation. This human capital, coupled with the country's stable government, low labor costs, and growing consumer class, positions it favorably for advanced air mobility development. Despite being one of ASEAN's less wealthy members, Cambodia has consistently ranked among its fastest-growing economies over the past two decades. The nation's practical needs align well with advanced air mobility solutions, particularly in rural and remote areas where climate-resilient infrastructure is lacking.

Unmanned Aerial Vehicle (UAV) applications show particular promise for improving logistical efficiency, replacing manual inspections, and strengthening emergency response capabilities through firefighting and medical delivery drones. Meszaros emphasized the importance of regional cooperation in strengthening frameworks and deepening knowledge through technical exchange and best practices sharing.

Highlighting successful drone applications in neighboring Thailand and Laos, she acknowledged valuable learning opportunities for Cambodia. The country's openness to adopting best practices and working alongside international professionals positions it as a potential proving ground for addressing and refining advanced air mobility challenges that could be scaled across the region.

"WHILE THE COUNTRY MIGHT NOT IMMEDIATELY COME TO MIND WHEN CONSIDERING ADVANCED AIR MOBILITY SOLUTIONS, CAMBODIA'S OPENNESS ALLOWS FOR TESTING, ADAPTATION, AND SCALABLE IMPLEMENTATION. ON THE UAV FRONT, CAMBODIA COULD SERVE AS A PROVING GROUND WHERE THESE CHALLENGES CAN BE ADDRESSED, REFINED, AND SCALED FOR BROADER APPLICATION ACROSS THE REGION."

NEW ZEALAND

LIAISON: **SACHA WETZEL**

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New Zealand's aerospace sector has been gaining momentum, particularly with developments like Rocket Lab and the emergence of the Dawn Aerospace space plane in Christchurch. A significant milestone in New Zealand's aviation landscape was the recent announcement of New Zealand Airports' six-point action plan, which addresses key aspects of aviation development including economic connectivity and emissions reduction goals. The plan also emphasizes infrastructure improvements, with Christchurch Airport taking notable steps by implementing solar panels to support local industry.

"INITIAL GROWTH IS MORE LIKELY TO EMERGE IN RURAL SECTORS RATHER THAN CITIES, WITH A FOCUS ON LONGER-DISTANCE ROUTES AND DRONE-BASED FREIGHT DELIVERY. IT IS IMPORTANT TO TELL THE COMPLETE STORY OF AVIATION ADVANCEMENT RATHER THAN FOCUSING SOLELY ON INTER-CITY SOLUTIONS. AS URBAN AIR MOBILITY REMAINS IMPORTANT, IT MAY NOT BE THE EASIEST INITIAL IMPLEMENTATION PATH FOR THESE TECHNOLOGIES."

In a major development for advanced air mobility, Beta Aviation has secured a deal to bring their Alia eVTOL aircraft to New Zealand for testing and operations starting next year. Initial operations will focus on freight transport, with discussions underway about potential aeromedical applications before transitioning to passenger services. Wetzel offered a thoughtful counterpoint to the common urban air mobility narrative, suggesting that initial growth is more likely to emerge in rural sectors rather than cities, with a focus on longer-distance routes and drone-based freight delivery.

This perspective stems from his extensive media and industry experience and operations involvement covering everything from business aviation to drones and aerospace developments. His work is further amplified through his company, Avfoil—a media-leading organization that has significantly impacted the industry by enhancing public awareness and connecting stakeholders.

Avfoil has been pivotal in bridging the gap between industry innovators and the public, serving as a critical platform for discussion, analysis, and the dissemination of aerospace news. Through targeted campaigns and strategic communications efforts, Avfoil has increased public understanding of complex aerospace developments, stimulated investment, and fostered collaborations across the sector. The company's initiatives not only spotlight major breakthroughs, such as the emergence of space planes and advanced air mobility solutions, but also reinforce New Zealand's position as a dynamic hub on the global aerospace map. In a rapidly evolving sector where technological breakthroughs and regulatory developments continually reshape the landscape, Avfoil's contributions are essential in driving innovation and shaping the narrative around aerospace advancement. Together, these developments and insights underscore a vibrant and forward-thinking aerospace ecosystem in New Zealand, one that is set to redefine global aviation standards.

AUSTRALIA

LIAISON: **CLEM NEWTON-BROWN**

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Australia's advanced air mobility landscape is distinguished by strong policy support from its federal aviation regulator, CASA (Civil Aviation Safety Authority), which has released critical documents including vertiport guidelines and a comprehensive Remotely Piloted Aircraft Systems and Advanced Air Mobility strategic regulatory roadmap. These frameworks provide crucial policy certainty and demonstrate the government's commitment to facilitating technological innovation. The country is currently developing a UTM (Unmanned Traffic Management) Action Plan and exploring collaborative research initiatives, including a Commonwealth Research Centre bid that could create opportunities for international involvement.

While Australia boasts only one local air taxi in development - AMSL Aero, which completed its first untethered flights with a unique hydrogen box-wing design - the nation is strategically positioning itself to leverage international Original Equipment Manufacturers (OEMs). The announcement by Joby to pursue certification in Australia signals a potential approach of parallel certifications across different regulatory environments, potentially accelerating operational readiness. Newton-Brown emphasizes that Australia's vast, open spaces and relatively uncongested urban environments make the country particularly suited for longer-range regional connectivity rather than short urban air taxi routes.

Public sentiment remains a critical consideration in Australia's advanced air mobility journey. Newton-Brown candidly acknowledges the challenges of community acceptance, recognizing that Australians, while being early technology adopters, are also deeply protective of their peaceful environments. The potential negative impact on amenity represents a significant psychological barrier.

"WE'RE PARTICULARLY INTERESTED IN THE ELECTRA AERO AIRCRAFT, BECAUSE THAT IS A STALL AIRCRAFT WITH 1,000-KILOMETRE RANGE."

His perspective suggests a gradual, measured approach - initially replacing helicopter services and slowly integrating more advanced mobility solutions to build public confidence.The country's upcoming events, such as the Avalon Airshow and various conferences hosted by the Australian Association for Uncrewed Systems, provide platforms for continued dialogue and technological showcase. These events represent crucial opportunities to demonstrate the potential of advanced air mobility and address public concerns through transparent communication and practical demonstrations.

SINGAPORE

LIAISON: **JENNIFER LIU PANLING**

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The Advanced Air Mobility Institute and NEO Aeronautics Pte Ltd have entered into a strategic partnership aimed at driving innovation and education in Advanced Air Mobility. This collaboration, formalized through a Memorandum of Understanding (MOU) signed in late 2024, outlines key initiatives to advance urban mobility, professional development, and emergency response capabilities on a global scale. The partnership aims to advance AAM through joint events, standards development, and training programs. They'll offer seminars on safety strategies and develop Professional Certificate programs with SIT. The Civil Aviation Authority of Singapore (CAAS) will lift the restriction on the number of unmanned aircraft over 250g that can be registered.

"SINGAPORE'S REGULATORY CHANGES, LIKE LIFTING UA REGISTRATION LIMITS AND INTRODUCING DIGITAL LICENSE PLATES, FOSTER INNOVATION AND GROWTH."

Effective February 14, this policy change aims to foster the growth of the UA industry by eliminating the cap on UA registrations. The removal of this restriction will promote the responsible and beneficial use of UA while supporting industry development, all without compromising public and aviation safety and security. This change is particularly advantageous for commercial UA operators and enthusiasts who typically own multiple UAs. They will now be able to register additional aircraft without requiring special approvals from CAAS. CAAS will permit commercial Unmanned Aircraft (UA) operators to fly up to 400 feet Above Mean Sea Level (AMSL) in designated areas every day of the week.

Additionally, the airspace clearance process will be streamlined, enabling companies to operate their UAS at higher altitudes with greater ease. Starting December 1, 2025, the Civil Aviation Authority of Singapore (CAAS) will require all Unmanned Aircraft (UA) over 25 0g to be equipped with digital license plates, known as Broadcast Remote Identification. This measure enables UA operators to track their flights, ensuring compliance with permitted airspace and preventing accidental incursions into restricted zones. Operator permit holders can now digitally manage airspace clearance through the CFMS FlyItSafe mobile app, using the new “Call Approval” feature. This eliminates the need to contact CAAS or RSAF at the start and end of UA operations.

For specific pre-identified and pre-cleared areas, depending on operational height, location, and timing, operators can also receive instant clearance, enhancing efficiency and improving operational productivity. Drones & Uncrewed Asia 2025 is happening from 09 to 10 April 2025 at Sands Expo & Convention Centre, Singapore. This event is where the latest drone and uncrewed tech innovations come together—covering everything from commercial UAV applications to next-gen autonomous systems. Expect key industry players, cutting-edge tech showcases, and insights into the future of AAM, BVLOS operations, and regulatory updates.

CHINA

LIAISON: **MARTIN DING**

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China has elevated advanced air mobility to unprecedented strategic importance, positioning it as one of three major strategic emerging industries alongside commercial space and biomanufacturing. This commitment was institutionalized through the establishment of a dedicated Low Altitude Economy department under the National Development and Reform Commission in December 2024, marking a significant milestone in governmental support for the sector. Ding emphasized that China's current success in this domain builds upon valuable lessons learned from two previous attempts at low-altitude airspace development dating back to 2009. This third iteration has shown remarkable progress, with most operational use cases already advancing beyond the innovation phase on the Gartner Hype Cycle. The only exception remains passenger-carrying services, which still face technological and regulatory challenges. The strength of China's approach lies in its comprehensive support structure at both national and local government levels.

This multi-tiered support system has fostered rapid development and implementation of advanced air mobility solutions. Public acceptance has grown significantly, as evidenced by the overwhelming response to the Low Altitude Economy exhibition at the Zhuhai Air Show, which became one of the most popular attractions.

Through his company, Albert Trust AI, established in May 2023, Ding is actively contributing to this ecosystem by developing innovative avionics and autonomous flight systems. His work focuses on elevating beyond traditional automatic flight control to achieve collaborative autonomy and intelligence, representing the next evolution in aviation technology.

Despite China's robust domestic progress, Ding stressed the critical importance of global harmonization in regulations and standards. He advocated for finding common ground among major countries and regions, recognizing that the future of advanced air mobility depends on international cooperation and standardization. This balanced perspective, acknowledging both national achievements and the need for global collaboration, reflects China's mature approach to developing its advanced air mobility sector.

"WE HAVE TO DRAW A CLEAR LINE AND FIND THOSE AREAS WHERE MAJOR COUNTRIES, NOT JUST CHINA, BUT EUROPE, APAC, UNITED STATES, AND ANY MAJOR COUNTRY OR REGION, CAN FIND MUTUAL GROUND FOR GLOBAL HARMONIZATION. I THINK IT'S EXTREMELY IMPORTANT AT THE MOMENT. WE NEED TO BE MENTALLY PREPARED THAT WE MUST WORK WITH THE GLOBAL AAM COMMUNITIES TO FIND CONSENSUS."

SOUTH KOREA

LIAISON: **MIN SHIN**

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The country achieved a significant milestone with Joby Aviation's successful completion of their first test flight in South Korea, marking a historic moment for international AAM collaboration. Infrastructure development is proceeding at pace, with Incheon Airport and KAC planning to construct 40 vertiports by 2027. Regional governments across Korea are actively competing to become early adopters of urban air mobility, with many investing heavily in infrastructure development to ensure timely operations. In the private sector, two major Korean companies, Hyundai and Hanwha, are driving significant investments in AAM development. While Hanwha discontinued their investment in Overair last year due to manufacturing setbacks, they have pivoted their focus to software development, particularly in traffic management systems for the UAM ecosystem. Hyundai continues to progress with their Supernal project, based in Irvine, California, though their launch timeline has been adjusted to between 2028 and 2030.

However, recent events have created some headwinds for the industry. Public sentiment has grown more cautious following a fatal incident with Jeju Air, which has had ripple effects across the broader air mobility sector.

"DESPITE THE SETBACKS, THERE'S STILL STRONG WILLINGNESS TO COMMERCIALIZE UAM IN SOUTH KOREA, BOTH FROM THE PRIVATE AND PUBLIC SECTOR. WE LAUNCHED KOREA'S FIRST AIR MOBILITY SERVICE UNDER OUR BRAND VONAIR LAST YEAR IN JUNE, STARTING WITH HELICOPTER OPERATIONS, AND WE ARE SCHEDULED TO LAUNCH OUR JET CHARTER SERVICE AS EARLY AS FIRST QUARTER OF 2025."

The implementation of martial law declarations by the President has also negatively impacted operations, particularly in the private jet sector, though this is viewed as a temporary setback. These events have caused regulatory progress to slow, with aerospace regulators focused on the Jeju Air investigation, potentially delaying UAM regulatory advancement by 6-12 months. Despite these challenges, South Korea maintains its commitment to AAM development, with significant events planned including the annual K-UAM Complex conference in November 2025. The Ministry of Transportation (MOLIT) is planning test flights for several UAM routes within Seoul City, targeted for late 2025 or early 2026. The general aviation sector continues to show growth potential, providing a foundation for future UAM operations.

PAKISTAN

LIAISON: **ANAS FARHAN AWAN**

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Pakistan’s aviation industry is deeply rooted in the potential and innovation of its youth, who continuously strive to enhance their knowledge, skills, and creativity. With a strong foundation in both commercial and defense aviation, Pakistan has made steady progress in integrating modern aerospace technologies. As the global aviation landscape shifts towards Advanced Air Mobility (AAM), Pakistan stands at the cusp of a transformative era, driven by its skilled manpower, strategic location, and emerging opportunities in aerial logistics.

Pakistan contributes significantly to global AAM development through its skilled workforce and strategic location. Its engineers and aviation professionals advance autonomous systems, smart air traffic management, and UAM solutions. Pakistan's position at the crossroads of South Asia, the Middle East, and Central Asia makes it crucial for aerial connectivity.

The China-Pakistan Economic Corridor CPEC aerial route offers opportunities to integrate AAM into regional trade, potentially revolutionizing logistics with unmanned cargo operations and efficient transportation. Pakistan's strategic location and commitment to humanitarian logistics make it ideal for deploying AAM technologies in disaster relief and emergency response. Drones and eVTOL aircraft can enhance crisis response, support displaced populations, and improve last-mile delivery of essential goods.

Two key initiatives driving Pakistan's aerospace advancements are: National Aerospace Science & Technology Park (NASTP): A flagship project fostering collaboration between academia, industry, and government for aerospace innovation. And National Incubation Center for Aerospace Technologies (NICAT): Supports the development of next-generation aerospace solutions.

“AS DEMAND FOR FAST, COST-EFFECTIVE, AND SUSTAINABLE AERIAL TRANSPORT GROWS, AAM CAN SERVE AS A GAME-CHANGER IN OPTIMIZING CPEC’S TRADE POTENTIAL THROUGH LOGISTICS AND UNMANNED CARGO OPERATIONS.”

These initiatives have attracted international attention, with Turkish Aerospace Industries (TAI) and Baykar Industries establishing a presence in NASTP, boosting Pakistan's capabilities in advanced aviation technologies. NICAT has become South Asia’s first dedicated aerospace incubation center, nurturing startups in aviation technology, AI air mobility, and smart air traffic management. It promotes research in Sustainable Aviation Fuels (SAF) and next-gen battery technologies, aligning with global sustainability trends in aviation. By leveraging its youth, strategic location, and innovative capabilities, Pakistan is poised to accelerate the adoption of advanced air mobility solutions. Through autonomous aviation and sustainable technologies, the country aims to revolutionize commercial applications while enhancing humanitarian aid and global trade connectivity.

INDIA

RATANDEEP TRIPATHI

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India is rapidly advancing its Advanced Air Mobility (AAM) ecosystem, particularly in urban air taxi services and electric Vertical Takeoff and Landing (eVTOL) aircraft. Startups like Vjiatra AirMobility, EPlane, and Sarla Aviation are leading the charge, with strong policy support from the government. The integration of VTOLs for airport feeder services and intercity mobility is expected to significantly enhance urban transport efficiency.

The Bharatiya Vayuyan Vidheyak, 2024, replaces the Aircraft Act, 1934, marking a transformative shift in India's aviation regulatory framework. This new legislation aims to modernize airspace management, streamline licensing processes, and facilitate new aviation technologies, including AAM and VTOLs. Key provisions include dedicated pathways for emerging aviation technologies such as eVTOLs, drones, and autonomous air vehicles; integration with global standards through alignment with ICAO and EASA frameworks to ensure international harmonization; simplified certification and compliance processes that enable faster approvals and reduce bureaucratic hurdles for startups and OEMs; and a structured framework emphasizing the operational safety and airworthiness of VTOLs and air taxis.

In a significant regulatory move, the Directorate General of Civil Aviation (DGCA) has issued an advisory on VTOL certification. This advisory outlines guidelines on several fronts. VTOLs must meet stringent airworthiness criteria based on global best practices from the FAA, EASA, and ICAO.

The advisory also introduces specific licensing requirements and training modules for VTOL operators and eVTOL pilots, supports designated VTOL flight paths in metro cities to decongest ground traffic, and establishes standard operating procedures for emergency landings, battery safety, and hydrogen fuel cell VTOLs. With a favorable policy environment, India is poised to become a leading AAM market. The combination of modernized aviation laws and VTOL certification frameworks is set to accelerate the commercialization of air taxis. Companies like Vjiatra Air Mobility, with their VJ220 Electric and V600x Hydrogen models, are expected to benefit from these regulatory advancements, pushing India to the forefront of global AAM innovation.

"WITH PROGRESSIVE REGULATORY REFORMS AND CLEAR CERTIFICATION PATHWAYS IN PLACE, THE FUTURE OF INDIAN AVIATION IS SET TO SOAR TO NEW HEIGHTS, ENSURING THAT THE COUNTRY REMAINS AT THE FOREFRONT OF GLOBAL AEROSPACE INNOVATION."

Overall, these regulatory advancements are expected to significantly boost India's AAM sector. The Bharatiya Vayuyan Vidheyak, 2024, removes longstanding bureaucratic hurdles and paves the way for technological innovation, while the DGCA's VTOL certification advisory ensures that new vehicles comply with international safety and operational benchmarks. Together, these measures are anticipated to stimulate interest from domestic and international investors, drive economic growth, and promote the development of a robust aerospace ecosystem.

THAILAND

NOPPADOL PRINGVANICH

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A significant milestone in Thailand's AAM journey was the introduction of new national regulations that streamline the approval process for unmanned aircraft systems, particularly those weighing more than 25 kilograms. Previously, such approvals required ministerial intervention, but now the civil aviation authorities can directly authorize these operations, dramatically accelerating the integration of drone technologies. This regulatory shift reflects Thailand's commitment to fostering technological innovation while maintaining robust safety standards. The country has been actively exploring diverse applications of drone technologies. Trials have included grocery delivery services on fixed routes within semi-urban environments, showcasing the potential for practical, everyday applications of advanced mobility technologies. Beyond logistics, Thailand has seen significant expansion in recreational drone use, particularly in photography, tourism, and agricultural applications. The agricultural sector, in particular, has embraced drone technologies for monitoring crops and enhancing farming practices, highlighting the technology's potential to transform traditional industries.

"THAILAND IS FORTUNATE THAT WE ARE QUITE ROBUST IN INTRODUCING NEW INNOVATIONS AND TECHNOLOGIES, AND PEOPLE ARE USUALLY QUITE RECEPTIVE TO TECH INNOVATION OR ANY COOL STUFF THAT'S COMING TO TOWN. THE OUTLOOK IS VERY STRONG - WE HAVE VERY GOOD PRIVATE SECTORS WITH KEEN INTEREST IN INTRODUCING NEW OPERATIONS."

A notable demonstration of Thailand's commitment to advanced mobility came in November, when EHung conducted a passenger drone flight in the heart of Bangkok during a public symposium hosted by the Civil Aviation Authority of Thailand. This public demonstration underscored the country's openness to innovative transportation technologies and its desire to be at the forefront of mobility innovation.

"Thailand is fortunate that we are quite robust in introducing new innovations," Pringvanich emphasized, highlighting the country's receptive attitude towards technological advancement. This openness extends beyond technological curiosity, manifesting in practical applications such as wildlife and elephant conservation, where drones have started playing a critical role in monitoring and protecting endangered species. However, Pringvanich was transparent about the challenges. The country recognizes the need for more effective regulatory enforcement, particularly in managing uncontrolled or potentially misused drone applications. Privacy concerns remain a significant consideration, reflecting a balanced approach to technological integration that considers both innovation and societal implications. Looking forward, Thailand is preparing to host advanced air mobility events and continue expanding its technological capabilities. The Ministry of Public Health is set to resume medical delivery drone trials in remote areas, and the country is planning to host an advanced air mobility event in Bangkok, signaling its continued commitment to being a regional leader in mobility innovation.

VIETNAM

KHOA DANG NGUYEN

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Vietnam, despite being at the early stages of its advanced air mobility journey, has made significant strides through strategic partnerships and forward-thinking initiatives. A landmark development in this journey has been the pre-ordering of 200 eVTOL aircraft from Japanese manufacturer SkyDrive by two Vietnamese companies, with each committing to 100 units. This substantial commitment demonstrates Vietnam's serious intention to integrate advanced air mobility into its transportation ecosystem and signals strong private sector confidence in the technology's future.

"VIETNAM'S JOURNEY IN AAM IS JUST BEGINNING BUT WE'VE SEEN SOME EXCITING DEVELOPMENTS. OUR COUNTRY IS ACTIVELY EXPLORING AAM SOLUTIONS TO ADDRESS URBAN CONGESTION AND ENHANCE TRANSPORTATION EFFICIENCY. THE RECENT DEPLOYMENT OF METRO SYSTEMS AND INTEGRATION WITH NEW PROJECTS DEMONSTRATES EXCELLENT OPPORTUNITIES FOR AAM, PARTICULARLY IN SECTORS LIKE CARGO TRANSPORT, TOURISM, AND DISASTER MANAGEMENT WHERE WE COULD SEE IMMEDIATE IMPACT."

The country's progress in advanced air mobility has been further strengthened by the modernization of its air traffic management system, achieved through a contract awarded to Indra Systems from Spain in August 2024. This technological upgrade establishes the fundamental infrastructure necessary for future advanced air mobility operations.

In a pioneering move that highlights the government's support for the sector, Binh Dinh province became the first governmental entity to propose the use of eco-friendly eVTOL aircraft for tourism purposes in October 2024. This initiative aims to showcase Vietnam's stunning landscapes while promoting sustainable tourism practices, creating a blueprint for other provinces to follow. Nguyen emphasized that while Vietnam's advanced air mobility sector remains in its infancy, particularly regarding regulatory frameworks and infrastructure development, the country's rapid urbanization and economic growth create compelling cases for implementation. The national approach to advanced air mobility has been measured and strategic, focusing on building public awareness and acceptance alongside technical capabilities. Vietnam's geographic characteristics, particularly its challenging terrain and numerous tourist destinations, present natural opportunities for advanced air mobility solutions. The recent deployment of metro systems in major cities demonstrates the country's commitment to modernizing its transportation infrastructure, creating potential synergies with future advanced air mobility networks. Notably, Nguyen identified several key sectors that could particularly benefit from advanced air mobility integration: cargo transport, tourism, and disaster management. However, he also acknowledged the challenges ahead, including the need toaddress limited public awareness, regulatory hurdles, infrastructure gaps, and concerns about privacy and technological readiness.

MALAYSIA

AFIQ AZHARI

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Malaysia has ambitious commitment to achieving net-zero emissions in aviation by 2050, as outlined in the Malaysian Aviation DecarboniZation Blueprint. A cornerstone of Malaysia's AAM development is the National Advanced Air Mobility regulatory sandbox, spearheaded by the Civil Aviation Authority of Malaysia and Futurize, which provides a secure environment for testing innovative technologies like UAS and eVTOLs.

Strategic partnerships have emerged as key drivers of progress, with Volocopter and Asia collaborating with Skyports and Heart Aerospace on multiple development projects and hybrid electric solutions. Welicoapter and Nation Airport Holding Berhad are conducting comprehensive feasibility studies for integrating urban air mobility into Malaysia's existing infrastructure. Azhari emphasized the importance of recent developments, including the Third AAM Industry Study workshop, which brought together key stakeholders to align strategic priorities across talent development, infrastructure, financial ecosystem, and public engagement. The workshop's insights will culminate in the ambitious Advanced Air Mobility Industry Report, scheduled for launch at LIMA 2025. Public sentiment in Malaysia shows encouraging signs, with many recognizing the potential for reducing urban congestion and enhancing connectivity, particularly in underserved areas.

"AT THE HEART OF OUR EFFORTS IS A COMMITMENT TO SUSTAINABILITY WITH A CLEAR TARGET OF ACHIEVING NET-ZERO EMISSIONS IN AVIATION BY 2050. WE ENVISION ADVANCED AIR MOBILITY AS A SEAMLESS COMPONENT OF OUR URBAN AND REGIONAL CONNECTIVITY, LINKING COMMUNITIES AND ENABLING GROWTH. BY UNITING INDUSTRY PLAYERS, POLICYMAKERS, AND COMMUNITIES, MALAYSIA HAS THE POTENTIAL TO BECOME A REGIONAL LEADER IN ADVANCED AIR MOBILITY, CREATING A FUTURE THAT IS SUSTAINABLE, INCLUSIVE, AND TRANSFORMATIVE FOR ALL."

A notable success story comes from STEM engagement in underserved schools, where drone education has empowered young minds to envision their role in shaping aviation's future. Malaysia's hosting of two significant events in 2025 - the Langkawi International Maritime and Aerospace Exhibition (LIMA 2025) and Drone Tech Asia 2025 in Kuala Lumpur - further demonstrates the country's commitment to advancing the sector. Through initiatives like Q Aero Technologies' programs, Malaysia is actively working to democratize access to electric flight, ensuring it becomes a cornerstone of sustainable and inclusive aviation development.

NEPAL

DIPESH KUNWAR

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Nepal's aviation sector is still in the early stages of adopting Advanced Air Mobility technologies. While research in this field is progressing globally, the Nepalese aviation industry has yet to achieve practical implementation due to challenges such as regulatory gaps, infrastructure limitations, and high development costs. Despite these hurdles, early advancements in unmanned aerial vehicles (UAVs) and hybrid personal air vehicles (PAVs) indicate future potential.

"WHILE NEPAL IS STILL FAR FROM WIDESPREAD AAM ADOPTION, ONGOING RESEARCH, UAV APPLICATIONS, AND STARTUP INITIATIVES SUGGEST THAT THE COUNTRY IS GRADUALLY LAYING THE GROUNDWORK FOR FUTURE AAM INTEGRATION, PARTICULARLY IN SECTORS WHERE UAVS HAVE ALREADY DEMONSTRATED SUCCESS."

Nepal has begun incorporating UAV technology for medical applications, particularly in delivering essential healthcare supplies to remote regions. Given the country's mountainous terrain and limited road connectivity, UAVs have proven to be an effective solution for transporting vaccines, blood samples, and medicines to rural health centers. Beyond medical applications, drones are also being used for remote sensing in agriculture, disaster management, and environmental monitoring, particularly for research purposes.

Despite this progress, Nepal's aviation regulations remain focused on traditional aircraft, with limited provisions for UAVs and emerging AAM technologies. The Civil Aviation Authority of Nepal (CAAN) has introduced some guidelines for drone operations, including restrictions on altitude, weight limits, and areas of operation. However, a comprehensive framework for integrating larger, more advanced AAM solutions, such as electric vertical takeoff and landing (eVTOL) aircraft, has yet to be developed. To facilitate future growth, regulatory agencies must establish clear policies on airspace management, safety protocols, and operational standards for autonomous air vehicles.

Similarly, while a few Nepalese startups are exploring hybrid PAVs and eVTOLs, these efforts remain in early research stages. Their primary focus is on assessing the feasibility of air mobility solutions suited to Nepal's unique geographical and infrastructural challenges. However, no commercially viable models have been introduced yet. Public awareness of AAM remains low, as Nepal's aviation infrastructure is primarily centered around conventional air travel. Nonetheless, the successful use of drones in healthcare and disaster response has positively influenced perceptions of UAVs. With increased investment and regulatory support, Nepal could gradually establish a foundation for AAM, particularly in medical logistics and emergency response applications.

FRENCH POLYNESIA

LIAISON: **MARANGAI MOEROA**

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The advanced air mobility ecosystem of French Polynesia represents a fascinating case study of technological adaptation driven by geographical necessity. With a population of 280,000 primarily concentrated on the main island of Tahiti, the country faces unprecedented challenges in transportation and connectivity.

"We're not leading the revolution," Moeroa candidly acknowledged, "but we're exploring alternatives to our predominant aircraft, the ATR 72." This exploration involves strategic collaborations with multiple international manufacturers, including Aura (a French electric aircraft manufacturer), Lilium, and Singapore's ST Engineering, with a particular focus on the Air Fish 8 vehicle that promises innovative mobility solutions. The regulatory framework in French Polynesia presents a unique model of technological integration, leveraging its status as a French territory to apply European regulations while maintaining flexibility for local adaptations. Moeroa's approach emphasizes a methodical exploration of technological potential, including the development of segregated drone delivery corridors in constrained areas.

"If we can validate this approach," she explained, "we can replicate it relatively easily across French Polynesia," revealing a strategic approach to technological implementation that prioritizes scalable, context-specific solutions.

Public sentiment in this remarkable archipelago reflects a nuanced technological receptivity shaped by geographical isolation and a desire for improved connectivity. While cautious about new technologies, the population demonstrates a profound understanding of mobility's transformative potential. "People want more comfortable transportation options, especially for their children," Moeroa noted, highlighting the human-centric motivation behind technological exploration. The unique cultural perspective even transforms technological adoption into a form of social progression, with new mobility solutions seen as potential markers of societal advancement.

"WE BELIEVE THAT WE CAN BE A GREAT PLAYGROUND TO DEMONSTRATE THE RELIABILITY OF NEW TECHNOLOGY. WE'RE VERY ENTHUSIASTIC ABOUT THIS GEOGRAPHIC OPENING UP AND PROVIDING SERVICES THAT ARE ESSENTIAL TO OUR POPULATION."

Looking forward, French Polynesia's advanced air mobility strategy focuses on comprehensive studies that demonstrate economic and social impact. By identifying global use cases and their potential local applications, the nation aims to attract private investors and create a tailored technological ecosystem. Moeroa's vision extends beyond mere technological implementation, seeing advanced mobility as a potential solution for geographic isolation, environmental sustainability, and improved quality of life.

TAIWAN

LIAISON: **TJ KO**

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Taiwan's approach to airspace management demonstrates careful strategic planning, with authority divided between local and central government based on altitude - local governments maintain jurisdiction for operations under 400 feet, while the central government oversees higher altitudes. The country has implemented a robust registration and certification system, with over 40,000 registered drones above 250 grams and 23 certified models across 7 different types for aircraft exceeding 25kg. Taiwan's commitment to safety and professionalism is evident in their three-tiered pilot licensing system, which has already certified nearly 30,000 pilots. A particularly innovative aspect of their system is the National Geography Identification System, which enables advance airspace reservation and comprehensive flight tracking.

"OUR GOVERNMENT ATTITUDE IS VERY OPEN, AND THEY ARE VERY AGGRESSIVELY WORKING WITH BOTH FAA AND EASA, AND ALSO JCAB TO REACH THE ALIGNMENT OF THE REGULATIONS, AND APPARENTLY ALSO HAD THE BILATERAL AGREEMENT WITH UK CAA ON THE CERTIFICATION OF THOSE AIRPLANES AS WELL. THIS CREATES A VERY POSITIVE INFLUENCE FOR THE DEVELOPMENT OF ADVANCED AIR MOBILITY IN OUR REGION."

The regulatory framework extends to technical certifications, with different requirements based on aircraft mass - those under 25kg require documents submission, while heavier aircraft must undergo physical testing and validation.

Taiwan's geographical characteristics, with 77% of its landscape being mountainous and frequent earthquake activity, have influenced their approach to AAM development. This has led to unique innovations, such as testing hydrogen fuel cell technology at high altitudes, including successful trials at Jade Mountain's peak (3,952 meters). The country maintains strong international collaborations, working closely with the FAA, EASA, and JCAB to align regulations, and has recently established bilateral agreements with UKCAA for aircraft certification.

Their commitment to infrastructure development is exemplified by the UAS center in Southern Taiwan, which has already reached full capacity and is expanding to phase 2 campus. Looking ahead, Taiwan's AAM roadmap extends to 2027-2028, with particular emphasis on pilot licensing, operator approval, flight operations, and airspace management integration.

SRI LANKA

LIAISON: **MADHUKA WANNIARACHCHIGE**

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As a developing island nation of approximately 20 million people, Sri Lanka's economy primarily revolves around agriculture, tourism, and exports including tea, rubber, coconut, and textiles. While the country finds itself in the early stages of adopting advanced air mobility technologies, with no major trials yet implemented, this positioning offers unique opportunities for strategic development. The focus remains primarily on economic recovery and essential industries, with AAM holding significant potential for improving connectivity to remote areas and enhancing tourism through better access to attractions. Current progress in the unmanned aerial systems sector is concentrated in practical applications, with drones being successfully deployed in agriculture and disaster management operations. This pragmatic approach aligns with the country's immediate needs while building foundation for future expansion. The regulatory landscape is evolving, with new legislative advancements pending that could significantly impact the sector's development.

Public sentiment toward advanced air mobility and unmanned aerial systems presents a complex mixture of reactions, reflecting both enthusiasm and concern. While there are apprehensions about safety, privacy, job displacement, and environmental impact - particularly relevant in a recovering economy - many stakeholders recognize AAM's potential to revolutionize emergency response capabilities and aid tourism development.

Success stories, particularly in disaster management and agriculture, have garnered public support and fostered acceptance of these technologies.

"THE FUTURE OF ADVANCED AIR MOBILITY IN SRI LANKA OFFERS OPPORTUNITIES TO IMPROVE CONNECTIVITY, BOOST TOURISM AND INNOVATIVE TRANSPORT INFRASTRUCTURE WITH GOVERNMENT SUPPORT. AAM CAN ATTRACT GLOBAL PARTNERSHIPS, DRIVE TECHNOLOGY GROWTH AND DEVELOPMENT. OVERCOMING CURRENT CHALLENGES WHILE LEVERAGING NEW TECHNOLOGIES IS CRUCIAL TO UNLOCKING AAM'S FULL POTENTIAL FOR THE COUNTRY'S DEVELOPMENT."

With the installation of a new government, Sri Lanka is positioning itself for rapid development and adaptation to global advancements, identifying advanced air mobility as a key area for transformation in transportation, tourism, and infrastructure. The Civil Aviation Authority of Sri Lanka maintains active collaborations with global aviation bodies to address future needs, while the government aims to explore opportunities in AAM, fostering innovations and growth as part of the country's broader economic recovery strategy.

SPECIAL PRESENTATIONS

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RICARDO APPARICIO

BEL-AIR MACHINING

Global AAM Forum, Winter 2025

With over 30 years of experience in the aviation sector and a background as a pilot, Ricardo Apparicio offered a distinctive viewpoint at the Advanced Air Mobility Forum, connecting traditional aerospace manufacturing with new technologies. Representing Bel Air Machine, Apparicio highlighted the unprecedented challenges and opportunities arising from the manufacturing needs of the advanced air mobility industry. He pointed out that as these companies sought manufacturing partners, they faced a considerable obstacle: traditional aerospace suppliers were already engaged in producing legacy aircraft for established names such as Boeing, Airbus, Embraer, and Bombardier. The situation worsened due to the global pandemic, which resulted in the shutdown of numerous smaller manufacturing facilities that could have supported this emerging sector. The evolution of Bel Air Machine to address this challenge is particularly impressive. The company strategically shifted its focus from conventional aerospace work to manufacturing rocket parts, collaborating with innovative firms like SpaceX and Blue Origin. This pivot necessitated the development of capabilities to manage short production runs, intricate components, and stringent timelines, and the addition of a robust DFM division (Design for Manufacturing)—all critical for the advanced air mobility sector.

This specialization has established Bel Air Machine as one of the few manufacturers equipped with the technical prowess and operational adaptability to assist advanced air mobility companies, including major players like Archer, Supernal, and Joby.

Apparicio's deep-rooted passion for aviation, stemming from his experiences as a pilot, enriches his professional insights. He sees this moment as historically significant, likening it to the dawn of aviation. Unlike the traditional aerospace industry, which has undergone relatively slow changes over decades, advanced air mobility signifies a groundbreaking shift in how aircraft are designed, produced, and utilized.

Drawing on his experience in São Paulo, home to the largest helicopter fleet globally, Apparicio views advanced air mobility as a viable solution to urban transport issues, offering more environmentally friendly and cost-effective alternatives to conventional helicopter operations. His insights encompass not just manufacturing, but also the broader ecosystem, highlighting the potential impact on real estate development through the introduction of vertiports and emphasizing the critical role of maintenance, repair, and overhaul (MRO) services in the future business model of the industry.

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BEL-AIR MACHINING

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RAFAEL DICKSON MORALES

DMAC DESPACHO JURIDICO

Global AAM Forum, Winter 2025

At DMAC Legal Firm, we specialize in providing personalized and proactive legal services, offering innovative solutions tailored to both national and international clients. Our mission is to position our clients at the core of our practice, ensuring risk mitigation, efficiency, and ethical legal representation.

Our firm is led by Rafael R. Dickson Morales, Managing Partner and Founder, who brings over 20 years of legal experience across various industries, including aviation and airport law. He has successfully advised, the Dominican Institue of Civil Aviation (IDAC) in new regulations including Advanced Air Mobility (AAM). Additionally, Rafael has played a key role in late years in the Dominican Republic airport infrastructure projects.

As global aviation advances, Advanced Air Mobility (AAM) is reshaping the industry, with innovative technologies such as urban air taxis, drones, and electric vertical takeoff and landing (eVTOL) aircraft redefining air transportation. Lately, IDAC have been very active to review new regulations and authorize projects involving AAM.

The Dominican Republic is uniquely positioned to integrate these advancements, given its strategic location as a Caribbean hub.

At DMAC, we stay at the forefront of regulatory developments affecting AAM, airport expansion, and aviation law, Public-Private Partnerships (PPPs) in Aviation: Advising on infrastructure investments, including airport modernization and air mobility hubs. Aircraft Finance & Leasing: Supporting airlines, lessors, and financial institutions in structuring aviation financing solutions.

As the Dominican Republic embraces next-generation air mobility, DMAC Legal Firm is committed to shaping the legal landscape and ensuring our clients remain ahead of emerging regulatory challenges. In summary, DMAC's efforts in AAM are characterized by a commitment to innovate in all legal and regulatory frameworks as well serve as a strategic partner in developing a business and industry in Dominican Republic involving AAM.

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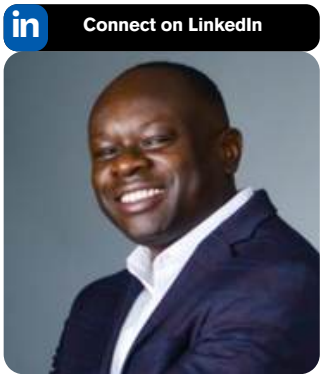
KEYNOTE

AEROSPACE INDUSTRY VETERAN

Global AAM Forum, Winter 2025



The advanced mobility landscape Onwe illuminates is fundamentally shaped by landmark regulatory developments, particularly the FAA Reauthorization Act of 2024, which represents a critical inflection point in aviation technology integration.

"The FAA Reauthorization Act clearly demonstrates the FAA's commitment to making an aviation system safer, more efficient, andaccessible," Onwe explained, highlighting the transformative potential of institutional support.

The act's mandate to develop a Center for Advanced Aviation and Technology by September 2026 signals a comprehensive approach to technological exploration, including the creation of airspace laboratories, flight demonstration zones, and testing corridors for emerging mobility technologies.

Onwe's perspective is anchored in a case study from Port San Antonio, a 1,900-acre technology and innovation campus that epitomizes the potential practical applications of advanced mobility technologies. The proposed eVTOL aircraft routes connecting the port to critical infrastructure like the Cadillac Transit Center and Texas A&M University campus represent more than mere technological demonstrations—they represent a fundamental reimagining of urban and regional connectivity.

"We really have an immediate need for these aircraft as we keep adding people to our campus," Onwe quoted Port San Antonio's CEO, capturing the human-centric motivation behind technological innovation.

The broader philosophical framework Onwe presents draws powerful parallels with transformative technological shifts, comparing advanced mobility's potential trajectory to the evolution of ride-sharing services and cellular communication technologies. He identifies three critical factors for widespread adoption: safety, affordability, and sustainability.

"Passengers and users of advanced air mobility vehicles must enjoy a safety and security assurance system that

surpasses what is being enjoyed today in conventional craft travel," Onwe emphasized, underscoring the need for technological innovations that exceed current transportation paradigms.

Drawing inspiration from transformative technological innovations like SpaceX's reusable rockets, Onwe's vision extends beyond mere technological implementation. He sees advanced mobility as a potential paradigm-shifting technology that could fundamentally transform human transportation experiences. "If we do the necessary, then do what's possible, suddenly humanity will be exposed to the spectrum of possibilities for advanced air mobility," he noted, capturing a profoundly optimistic perspective on technological potential that sees innovation not just as a

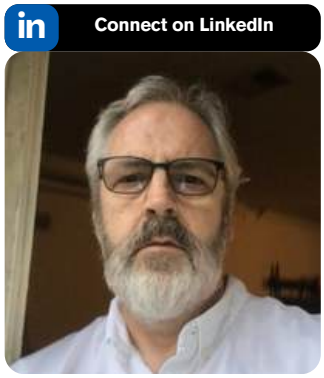
technical challenge, but as a human narrative of continuous progress.

GRAHAM WARWICK

KEYNOTE

EXECUTIVE EDITOR, AVIATION WEEK

Global AAM Forum, Winter 2025



Graham Warwick, the technology editor for Aviation Week, brings a seasoned journalist's perspective to the complex landscape of advanced air mobility, offering a nuanced interpretation of the industry's current state that goes far beyond surface-level reporting. With over 15 years of dedicated coverage of electric aviation, eVTOL, and advanced air mobility technologies, Warwick provides a panoramic view of a rapidly evolving technological ecosystem, tracing its development through multiple global contexts and highlighting the intricate challenges that stand between current potential and widespread implementation.

The global advanced air mobility landscape in 2024-2025 presents a narrative of measured progress tempered by significant economic and regulatory challenges. Warwick's analysis reveals a sector experiencing what he describes as a "dose of reality," where initial optimistic projections are being recalibrated against the complex practical realities of technological, regulatory, and economic integration. In the United States, for instance, the anticipated certification of eVTOL air taxi services has been pushed back, with 2026 now appearing more realistic for initial commercial operations, and 2027 potentially being a more probable timeline.

"Nothing is going as fast as we hoped, and as many still want it to go," Warwick candidly observed, encapsulating the industry's current state of patient anticipation and strategic recalibration.

The global perspective Warwick presents is particularly fascinating, revealing dramatically different technological ecosystems across regions.

While the United States and European markets have experienced significant challenges—with companies like Lilium and Volocopter facing near-collapse—emerging markets present unexpected dynamism. China emerges as a standout, with what Warwick describes as an "explosion" of advanced mobility startups, supported by strong central government policies and a conception of a "low altitude economy" that encompasses drones, general aviation, helicopters, and advanced mobility solutions. This governmental support, coupled with significantly lower capital costs, has enabled Chinese startups to develop flying demonstrators at a fraction of the cost required in Western markets.

Warwick's analysis extends beyond mere technological assessment, delving into the deeper economic and regulatory challenges that define the advanced mobility landscape. The industry faces substantial financial hurdles, with even well-funded leaders like Joby and Archer needing to raise an estimated 2-3 billion dollars to scale operations effectively. Certification processes remain "brutally tough," creating significant barriers to market entry. Yet, Warwick remains fundamentally optimistic, noting that the transformation has begun, with expectations of more electric fixed-wing aircraft certifications in 2025 and the first electric cargo aircraft entering operational stages.

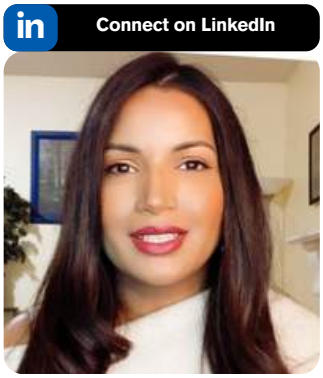
"The transformation has begun," he emphasized, suggesting that while progress might be slower than initially anticipated, the fundamental shift towards electrified, advanced mobility is inexorable.

SUPREET “SUE” KAUR

KEYNOTE

SYSTEM INTEGRATION LEAD, NASA AMES CENTER

Global AAM Forum, Winter 2025



As an Integration Strategist for NASA's Air Traffic Management Exploration Project (ATMx), Supreet Kaur offered an illuminating perspective on NASA's comprehensive approach to advancing aviation technology. Speaking from NASA Ames Research Center in Silicon Valley, she emphasized that while NASA is often associated with space exploration, the first "A" in NASA stands for aeronautics, highlighting the agency's deep-rooted commitment to aviation advancement. Through its network of flight and research centers across the United States, NASA maintains extensive collaborative relationships that leverage each center's unique specialties and capabilities. The ATMx project, operating within NASA's Advanced Air Mobility Operations System Program (AOSP), exemplifies this collaborative spirit by taking an integrated approach to enabling airspace access for new entrants while facilitating safe integration of emerging aviation technologies. Their work spans an impressive range from ground level to altitudes above 60,000 feet, encompassing everything from data exchange platforms to remotely supervised missions. Kaur detailed how ATMx serves as a crucial facilitator, bringing diverse stakeholders together to identify opportunities and gaps in enabling the aviation industry's growth, with safety at the forefront. The project maintains strong partnerships with the FAA, commercial entities, industry experts, and international collaborators, conducting research through both advanced simulation and field testing in near-realistic conditions.

Their portfolio includes four key sub-projects: DIP (Digital Information Platform), which prototypes a digital framework leveraging machine learning for predictive services; UTM BVLOS (Uncrewed Airspace Systems Traffic Management Beyond Visual Line of Sight), focusing on safe drone integration; PAAV (Pathfinding for Airspace with Autonomous Vehicles), which tests tools for remotely piloted operations; and NExCT (NAS Exploratory Concepts and Technologies), which cooperative operating practices fro situational awareness in Upper Class E airspace.

A particularly noteworthy initiative is their support of the Federal Aviation Administration (FAA) UTM Key site in Dallas-Fort Worth, Texas, where a consortium of industry stakeholders are testing initial beyond visual line of site (BVLOS) operations in low-altitude Class G airspace for package delivery and public safety missions. The project's ultimate goal extends beyond simply developing individual technologies – they aim to create a seamlessly integrated system where various aviation innovations can work together effectively. This includes investigating the impacts of emerging mobility solutions, researching computing and communications advances, and validating increasingly automated technologies through both domestic and international cooperation.

DARRELL SWANSON

KEYNOTE

CO-FOUNDER, EA MAVEN

Global AAM Forum, Winter 2025

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Darrell Swanson emerges as a pivotal figure in the Advanced Air Mobility (AAM) landscape, bringing a transnational perspective to the evolution of electric aviation technologies. As co-founder and director of Electric Aviation Maven (EA Maven), based in the United Kingdom, Swanson represents a critical intersection of strategic analysis, market assessment, and technological innovation. His professional approach combines rigorous data modeling with a nuanced understanding of the complex ecosystem driving mobility transformation.

The United Kingdom's AAM landscape, as interpreted through Swanson's expertise, is characterized by a cautious yet progressive approach to technological implementation. The Future Flight Challenge, funded by UKRI with approximately 300 million pounds of joint industry and government investment, represents a significant milestone in supporting over 200 projects

across the country. Companies like Vertical Aerospace have maintained momentum despite challenging market conditions, while initiatives such as the National Air Traffic Services' development of a communication data backbone for UTM operations demonstrate the country's strategic commitment to mobility innovation. Swanson's methodology distinguishes itself through a bottom-up approach to market analysis, utilizing sophisticated data modeling techniques that go beyond traditional econometric forecasting. EA Maven's proprietary tools integrate mobile phone data, mobility patterns, and advanced scheduling algorithms to provide unprecedented insights into potential AAM routes, fleet requirements, and economic impacts.

"We're not using top-down econometric guessing," Swanson explains, "but a comprehensive approach that indexes relevant information to identify core routes and potential."

The company's research reveals a counterintuitive perspective on urban versus regional air mobility. Contrary to many industry narratives, Swanson's analysis suggests that regional air mobility holds significantly more potential than urban mobility. Their models indicate 684 potential regional routes compared to 994 urban routes, with regional mobility potentially generating 1.1 billion pounds in economic impact versus 615 million for urban mobility. This nuanced understanding challenges prevailing industry assumptions and provides a more sophisticated framework for mobility development.

Energy infrastructure represents a critical challenge in the AAM ecosystem, a factor Swanson's research illuminates with remarkable clarity. Projections suggest that a fully hydrogen-powered regional air mobility system would require 2.7 terawatt hours of power, compared to 850 gigawatt hours for urban mobility. These insights underscore the complex infrastructure challenges that must be addressed to realize the full potential of advanced mobility technologies.

JASON PRITCHARD

KEYNOTE

EXECUTIVE EDITOR, EVTOL INSIGHTS

Global AAM Forum, Winter 2025

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Jason Pritchard, the executive editor of eVTOL Insights, brought a dynamic and comprehensive perspective to the Global Advanced Air Mobility Forum, representing one of the leading news sources covering the advanced mobility market. With an infectious enthusiasm and deep industry insight, Pritchard positioned 2025 as a pivotal year for global advanced mobility, offering a nuanced overview of the current technological and market landscape. His presentation went beyond mere reporting, providing a strategic analysis of the industry's current state, challenges, and potential trajectories.

eVTOL Insights is more than a news platform; it's a comprehensive ecosystem of aviation intelligence. The organization offers daily news, interviews, podcasts, and special reports, while hosting global conferences in Palo Alto, Munich, and Brisbane, along with networking events and industry awards, positioning itself as a key hub for information and connection in advanced mobility

"2025 is going to be a pivotal year for the global advanced mobility market, " Pritchard declared, highlighting the critical importance of collaboration between regulators, manufacturers, and operators. He noted that while electric aircraft like the Pipistrel Velis Electro have been certified, passenger-carrying electric air taxis are still in a developmental stage.

The Middle East and China emerged as the most progressive markets, with regions like India also showcasing promising technological advancements through events like the Urban Mobility Expo in Delhi.

Pritchard's analysis wasn't merely technological but deeply human-centric. He emphasized that public acceptance is crucial to the industry's success, stressing that people are excited about the technology but need to be "brought along on the journey.

"This required extensive education and demonstration of the technology's potential benefits. Political dynamics also play a significant role, as evidenced by experiences like Volocopter's attempt to demonstrate air taxi flights during the Paris Olympics, which was met with considerable public skepticism.

The presentation also highlighted significant industry developments, including Archer's completion of their Covington facility in Georgia, Lilium's strategic partnership with Mobile Uplift Corporation, Vertical Aerospace's first piloted thrustborne flight, and Joby Aviation's groundbreaking flight tests in Korea. Pritchard candidly acknowledged that while electric airtaxis might not be fully operational until 2026-2027, the industry was making substantial progress, with companies continuously pushing technological boundaries and expanding potential use cases.

MARIYA TARABANOVSKA

KEYNOTE

FOUNDER, FLIGHT CROWD

Global AAM Forum, Winter 2025

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Mariya Tarabanovska, as a keynote speaker representing a UK non-profit Flight Crowd, has distinguished herself as a leading voice in the human-centric aspects of Advanced Air Mobility, focusing on public engagement, education, and workforce development.

Her organization's comprehensive approach to industry development encompasses multiple strategic initiatives, from grassroots education to professional training programs. Under her leadership, Flight Crowd has implemented extensive school and university outreach programs, designed to inspire and educate the next generation of aviation professionals.

Tarabanovska has been particularly successful in developing and implementing youth competitions that engage young people with aviation technology and concepts, fostering early interest in the field. Her work in professional development has been equally impactful, creating programs that help build the skilled workforce needed to support the growing AAM sector.

Ukrainian-born and a female engineer by background, she places an emphasis on building sustainable and inclusive pathways into the aviation industry, ensuring that opportunities are accessible to diverse populations regardless of their background.

Tarabanovska's vision for the future of flight is both ambitious and practical, focusing on creating an ecosystem that balances technological advancement with human needs and capabilities.

Her work in global collaboration has been particularly noteworthy, fostering international partnerships and knowledge sharing that benefit the entire industry.

Through Flight Crowd's initiatives, she has helped establish new standards for public engagement and workforce development in the AAM sector, recognizing that public acceptance and understanding are crucial to the industry's success. Her approach to building public awareness and trust in new aviation technologies has been methodical and comprehensive, addressing concerns while highlighting opportunities and benefits.

Tarabanovska's leadership continues to shape how the industry approaches public engagement and workforce development, ensuring that the future of aviation is not only technologically advanced but also user-centric. She has also pioneered innovative approaches to community engagement, including virtual reality demonstrations and interactive workshops that help make complex aviation concepts accessible to the general public.

Her work has extended beyond traditional education to include mentorship programs, career guidance initiatives, and specialized training for underrepresented groups in aviation. Through these comprehensive efforts, Tarabanovska has helped create a more inclusive and diverse future for the aviation industry.

JIM IVES

EXECUTIVE VICE PRESIDENT

Advanced Air Mobility Institute

Global AAM Forum, Winter 2025

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Jim Ives, an aviation expert with more than three decades of experience and a seat on the AAM Institute board, provided his perspective on the rapidly evolving advanced air mobility (AAM) sector. He recognized the collective effort propelling the industry forward, while acknowledging inherent obstacles and potential gains. Collaboration emerged as a central theme throughout his address, reflecting his conviction that diverse ideas and technological breakthroughs are fueling AAM's expansion. He recalled notable industry milestones in 2024, some of which pointed to volatility, but maintained an upbeat outlook for 2025, anticipating a surge of activity across various AAM segments. Ives specifically highlighted the significance of the Pulitzer Electric Aircraft Race scheduled for October. Organized by the Institute, this upcoming event is poised to attract widespread attention and serve as a catalyst for rapid advancements in electrification and deployment of pioneering aviation solutions. He believes that showcasing these emerging technologies can spark fresh innovations and demonstrate real-world capabilities to both regulators and industry stakeholders. Turning to certification and regulation, he underscored how government agencies worldwide play a pivotal role in defining the trajectory of AAM. Although he likened the certification process to a formidable barrier, he sees it as an essential benchmark that compels manufacturers and operators to meet demanding safety and performance standards. According to Ives, the push toward global certification harmonization will foster a more mature industry and drive breakthroughs, whether in battery efficiency, hydrogen-based propulsion, or other critical technological arenas.

Within this evolving environment, Ives also predicted consolidation in the form of partnerships and mergers among original equipment manufacturers, parts suppliers, and infrastructure developers. He reasoned that these alliances would enhance operational efficiency and fortify the AAM sector. Additionally, he pointed out that evolving technology will continue reshaping mobility by merging traditional and next-generation aviation. The necessity of comprehensive training was another focal point of his address. While pilot training remains essential, Ives insisted that other roles such as maintainers, dispatchers, and support staff are the backbone of the industry and deserve as much focus as pilots. Only through an inclusive approach, he argued, can the industry fully adapt to novel technologies and strict certification mandates. Ensuring sufficient expertise in every facet of AAM operations will be vital to future growth.

"CERTIFICATION REMAINS A GATE FOR THE INDUSTRY, YET ONCE OVERCOME, IT BECOMES A SILVER LINING, PUSHING STAKEHOLDERS TO ELEVATE INNOVATION AND MEET THESE RIGOROUS SAFETY STANDARDS."

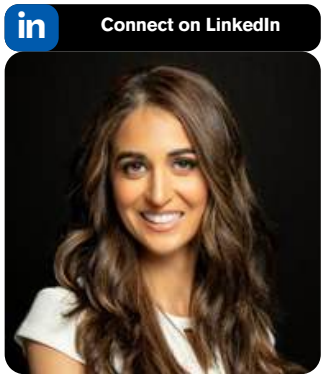
In his concluding remarks, he conveyed appreciation to all participants, from keynote speakers to behind-the-scenes teams who contributed to the success of the forum. Stressing that AAM's future relies on communal commitment, he portrayed upcoming challenges related to certification, technological evolution, and industry consolidation as opportunities for further advancement. His observations epitomized a sector on the cusp of transformative breakthroughs.

DASSIE PERSAUD-VAN DER WESTHUIZEN

CHIEF OF STAFF

Advanced Air Mobility Institute

Global AAM Forum, Winter 2025



Dassie Persaud-van der Westhuizen, an aviation planner specializing in sustainability at Mead & Hunt and a senior advisor at the Advanced Air Mobility Institute, presented a critical perspective on stakeholder engagement that goes beyond traditional approaches to technological implementation. With a strategic and practical mindset, she introduced a comprehensive toolkit designed to bridge the gap between advanced mobility technologies and community understanding, recognizing that successful technological integration requires more than just innovative engineering. Drawing from the ACRP Report 261 – Advanced Air Mobility and Community Outreach: A Primer for Successful Stakeholder Engagement and its Appendix, Persaud-van der Westhuizen outlined a sophisticated eight-step roadmap for effective stakeholder engagement in advanced air mobility projects. This methodology provides a structured approach to technological communication, beginning with identifying a project champion and establishing clear goals, and progressing through stakeholder identification, message development, communication strategy creation, outreach plan and timeline development, executing and documenting the outreach, and a comprehensive follow-up assessment. Her presentation emphasized that successful technological implementation is fundamentally a human-centered process that requires careful, deliberate engagement. The toolkit she presented includes several innovative resources designed to facilitate meaningful dialogue about advanced mobility technologies.

A key component is a stakeholder self-assessment survey that gauges knowledge, interest, and engagement levels of different groups. This gap analysis helps agencies focus their engagement efforts. The toolkit also includes a fact sheet addressing common questions, a presentation deck, event invitation templates, and customizable educational resources for specific community contexts.

Persaud-van der Westhuizen's approach acknowledges the crucial role of public perception in technological adoption. By offering practical communication tools, she provides organizations with a strategic framework for introducing complex technologies like advanced air mobility to diverse stakeholders. Her methodology focuses on creating meaningful dialogue, addressing concerns, and fostering collaborative understanding, rather than just disseminating information.

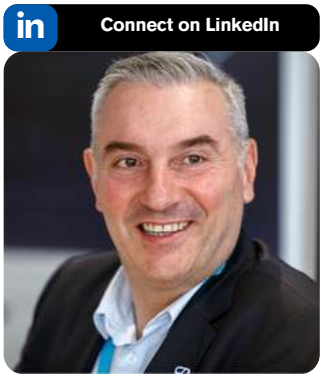
The presentation emphasized that successful technological innovation requires comprehensive strategies addressing human factors, community concerns, and social integration. Persaud-van der Westhuizen offered a systematic stakeholder engagement approach, providing organizations with a valuable resource for implementing advanced air mobility technologies in an inclusive manner. "Strong stakeholder engagement is directly related to the success of a project, and we've created tools that can help agencies conduct community outreach activities effectively and comprehensively. "

JEAN-CHRISTOPHE DRAI

SENIOR ADVISOR

Advanced Air Mobility Institute

Global AAM Forum, Winter 2025



Jean-Christophe Drai emerges as a pivotal storyteller of urban air mobility's most challenging frontier, representing Volocopter as their senior advisor for sales in the Middle East and Europe.

His presentation at the Global Advanced Air Mobility Forum offered an intimate glimpse into one of the most audacious urban air mobility experiments of recent years: Volocopter's unprecedented demonstration flights in Paris, a journey that epitomizes the complex dance between technological innovation, public perception, and regulatory navigation. As a key figure in a company that has weathered significant industry challenges, Drai's narrative is less about technological triumph and more about the nuanced human and institutional dynamics that ultimately determine the success of transformative technologies.

The Paris experiment stands as a microcosm of the broader advanced air mobility challenges, revealing the intricate negotiations required to introduce radical transportation technologies into established urban environments. Drai's strategic partnership with ADP Group, which manages Paris airports, was crucial in creating an ecosystem that could support these groundbreaking flights.

"Everyone knows about the infrastructure, but we partnered with Paris airport operators to build up a vertiport in Paris, " he explained, highlighting the critical importance of institutional collaboration. The initiative involved not just technological demonstration but a comprehensive engagement strategy that addressed public curiosity, concerns, and the fundamental human resistance to radical transportation transformations.

Public acceptance emerged as the most critical challenge, with Volocopter confronting deeply ingrained skepticism about aerial passenger transportation. The initial perception of air taxis as "a toy for rich people" required a deliberate, multifaceted approach to communication and demonstration. Drai's team strategically engaged with diverse audiences, from aviation professionals to general citizens, particularly during events like the Le Bourget Paris Show. Their approach emphasized transparency, education, and practical demonstration, gradually dismantling preconceived notions about the feasibility and accessibility of urban air mobility.

"You have to go to them, explain, and show what could be the benefit for them in the future," Drai noted, encapsulating their community engagement philosophy.

The regulatory landscape presented another complex dimension, requiring close collaboration with French civil aviation authorities and developing a comprehensive Concept of Operations (ConOps) that could withstand rigorous safety scrutiny. Despite facing significant opposition from the Paris City Council and various associations, Volocopter maintained a persistent, patient approach to integration. Their public sentiment research revealed fascinating insights, with medical transportation and inter-regional connectivity emerging as the most compelling use cases for potential passengers. This nuanced understanding of public expectations goes beyond mere technological capability, addressing fundamental human needs for efficient, accessible transportation solutions.

TOMISLAV LANG

SENIOR ADVISOR

Advanced Air Mobility Institute

Global AAM Forum, Winter 2025

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Tomislav Lang is a seasoned aviation entrepreneur and senior advisor with a deep-rooted expertise in regional air transport. With leadership experience at Air Berlin, Condor Airlines, and SkyWork Airlines, as well as Volocopter and advisory roles at the Advanced Air Mobility (AAM) sector, Lang has been at the forefront of shaping modern air mobility solutions. Now, as the founder and CEO of flyvbird, he is focused on reinstating regional air connectivity by leveraging operational efficiencies and new aircraft technologies.

At its core, flyvbird is not a tech company but an air mobility provider—one that integrates smart technology to optimize and scale regional air travel. The decline of regional flights in Europe has left many areas underserved, and traditional airline models struggle to make these routes viable. flyvbird addresses this gap by utilizing an on-demand, asset-light model that replaces fixed schedules with dynamic routing, ensuring that aircraft operate only where and when demand exists. While AI and machine learning enhance efficiency—helping to predict demand, optimize flight planning, and lower costs—the heart of the business remains providing seamless, accessible air travel for regions that need it most.

PIONEERING THE FUTURE OF REGIONAL AIR MOBILITY WITH FLYVBIRD

Lang's strategic vision extends beyond simply filling existing gaps. flyvbird serves as a key business enabler for the next generation of aircraft technologies, ensuring that electric, hybrid, and advanced propulsion aircraft can be successfully integrated into real-world operations. The company's collaborations with major OEMs, including Electra Aero, reinforce its role in paving the way for more efficient, sustainable air travel solutions.

With an ambition to scale from a single fleet to managing hundreds of aircraft worldwide, flyvbird is not just another airline—it is building the foundation for a new era of regional aviation, where smarter operations, flexible networks, and new aircraft types redefine air mobility.

ZOYA AGARWAL

SENIOR ADVISOR

Advanced Air Mobility Institute

Global AAM Forum, Winter 2025

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Captain Zoya Agarwal's contribution to the Advanced Air Mobility Forum brought a unique intersection of traditional aviation expertise and future-focused urban mobility vision. As a Boeing 777 captain with two decades of aviation experience, her perspective bridges the gap between conventional commercial aviation and emerging transportation technologies. Her recent MBA studies in New York provided her with fresh insights into the economic implications of urban congestion, which she articulated through compelling statistics: New Yorkers spent an average of 102 hours in traffic in 2024, resulting in a staggering $10 billion economic loss for the city.

This real-world example effectively illustrated the urgent need for innovative transportation solutions in major metropolitan areas. Captain Agarwal traced the evolution of aviation from the Wright Brothers' first powered flight through to modern aircraft like the Boeing 777s and Airbus 350s, which have transformed global connectivity. She positioned advanced air mobility as the next revolutionary step in this progression, particularly in addressing the challenges faced by densely populated urban centers. Her vision extends beyond mere technological advancement; she sees advanced air mobility as a catalyst for fundamental improvements in quality of life and economic efficiency across metropolitan areas worldwide.

What sets her perspective apart is her deep understanding of both the technical and human elements of aviation. She emphasized that the success of advanced air mobility will depend on the collaborative efforts of multiple stakeholders, from real estate developers to airlines, urban planners, and regulatory bodies.

Captain Agarwal placed particular emphasis on the critical role of building consumer confidence in advanced air mobility technologies. She called upon industry professionals to take an active role in public education and awareness building, recognizing that public acceptance will be crucial for the widespread adoption of these new transportation systems. Her perspective carries additional weight given her experience in traditional aviation, where she has witnessed firsthand how technological advancements can transform transportation paradigms when properly implemented and accepted by the public.

ANKIT SANAN

SENIOR ADVISOR

Advanced Air Mobility Institute

Global AAM Forum, Winter 2025

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Drawing from his extensive 19-year background as an airline pilot and key industry roles, Ankit Sanan delivered a comprehensive analysis for the Middle East and India's advancing positions in the AAM landscape. Qatar, while currently positioned behind UAE and Saudi Arabia in the regional race to embrace advanced air mobility, as per reports it has announced ambitious plans to commence electric air taxi testing and cargo drone operations in early 2025. The Ministry has taken proactive steps by seeking approvals from relevant Qatari bodies for trials, aligning with the country's broader vision of developing an integrated mobility ecosystem as part of the Third Qatar National Development Strategy. Qatar's commitment to AAM is further evidenced by substantial financial backing through the Qatar Investment Authority and Qatar Sovereign Fund, which have made significant investments in Beta Technologies.

UAE on the other end has made significant progress and is leading the global market in accepting and exploring innovating means of transportation. The local state authorities along with partners such as Joby, Archer & Skyports have embraced the opportunity and have broken ground towards infrastructure development with probable operations commencing by the end of this year or early 2026. In India, the landscape is equally dynamic, with domestic OEMs making remarkable progress backed by substantial funding. Companies like BlueJ Aero, The ePlane Company, and Sarla Aviation are targeting aircraft launches from 2027-2028, with The ePlane Company emerging as an industry leader following their recent design certification application acceptance by DGCA.

The ecosystem received a boost with Eve's vector management software being adopted by JetSetGo, complementing existing partnerships with Blade. The scale of commitment is reflected in orders exceeding 400 VTOLs across various operators including Blade (Hunch Mobility), JetSetGo, and Archer. The Indian Civil Aviation Authority has demonstrated strong support for technological advancement, publishing preliminary circulars for vertiport certification and vertiport operators. The country has already implemented successful drone technology pilot projects serving agricultural and mail services, while the Bharat Mobility Summit stands as a testament to India's business-friendly approach to AAM development.

However, Sanan noted that many founders and early investors have underestimated the costs associated with aircraft development & certification, particularly for VTOLs intended for commercial passenger and cargo operations. This has led to challenges similar to those faced by companies like Lilium and Volocopter, often exacerbated by OEMs attempting to simultaneously function as operators, manufacturers, and software providers. "On the public sector, regulators and politicians are pushing hard to commercialize UAM and there's a strong willingness to commercialize UAM, both from the private and public sectors. The general aviation sector is still expected to grow, which we believe will be a good foundation for UAM operation in the future."

ADVANCED AIR MOBILITY INSTITUTE

PULITZER ELECTRIC AIRCRAFT RACE

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Dan Sloat
Executive Producer
Pulitzer Electric Aircraft Race

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Scott Neumann

RACE DIRECTOR

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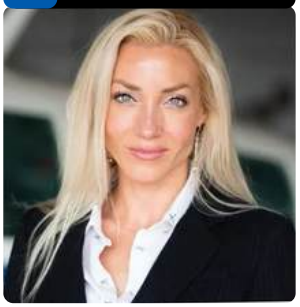

Gloria Bouillon

COMMUNITY INTEGRATION DIRECTOR

The AAM Institute is launching the Pulitzer Electric Aircraft Race to drive public awareness to this new form of safe, reliable, and sustainable air transportation. **The Pulitzer Electric Aircraft Race is a revival of the legendary Pulitzer Trophy** first held as the marquee event of the National Air Races in the early 1920s during the Golden Age of air racing and marks the 100th anniversary of the last running in 1925. Just as the original Pulitzer Races were designed to achieve public acceptance for aviation itself, now, a century later, the AAM Institute will re-launch the Pulitzer Trophy annual race series as the Pulitzer Electric Aircraft Race with **the goal of showcasing the diversity of design in electric aviation, fostering public acceptance for electric aircraft and AAM, and harnessing the power of competition to spark technical advances in the electric aircraft industry.** The first race is scheduled for October 2025 in Springfield, OH at the National Advanced Air Mobility Center of Excellence (NAAMCE) campus. The race is open to piloted aircraft of all types using zero-emission electric propulsion. During the two-day event, each race will feature up to eight heats of three aircraft flying three laps around a 30 nm triangular course to demonstrate electric aircraft speed, range, and reliability in a realistic operating environment. The winning team will be recognized alongside the Pulitzer Trophy on display at the Smithsonian National Air and Space Museum in Washington DC. "*This is the right race at the right time for electric aviation*." said Race Director, Scott Neumann (USAF Col ret). "We have designed the first Pulitzer Electric Aircraft Race in a way to honor the legacy of the original races from a century ago and at the same time to highlight the amazing potential of this new form of air transportation as it emerges - this race bears witness to the beginning of the electric age of flight."

Gloria Bouillon, Community Integration Director, commented "In a little less than a year, our three-person Steering Committee has developed one of the most exciting, and incredibly significant events of our time: the first ever Electric Air Race, marking the 100th year anniversary of the last Pulitzer race. This will serve as the cornerstone event; to bring this air race to communities across America and the globe for years to come. Not only will this serve to pave the way for the highly needed efforts of community engagement for AAM development, though, it is bringing the community into the event in an exciting, educational manner, with benefits to Ohio as well as the OEMs and all participating and supporting companies. Our shared mission is to inspire and actively engage with the community to foster support for eVTOL adoption and ensure the long-term success of its operations. "

ACKNOWLEDGMENTS

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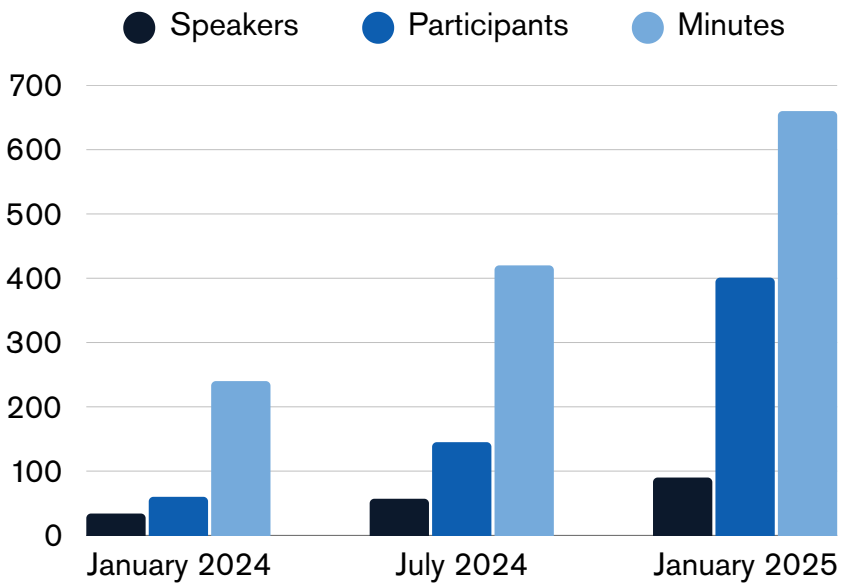

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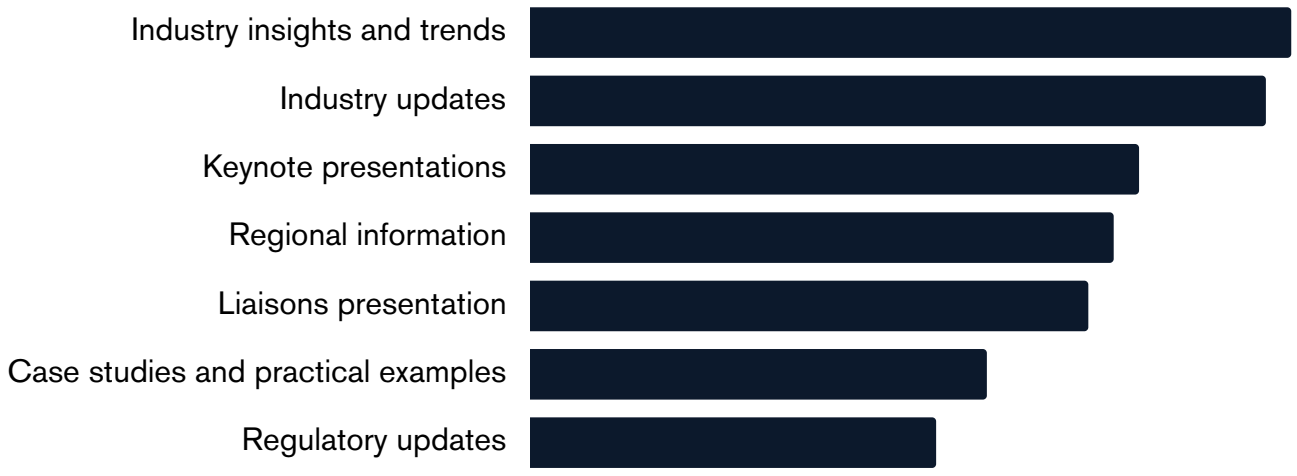

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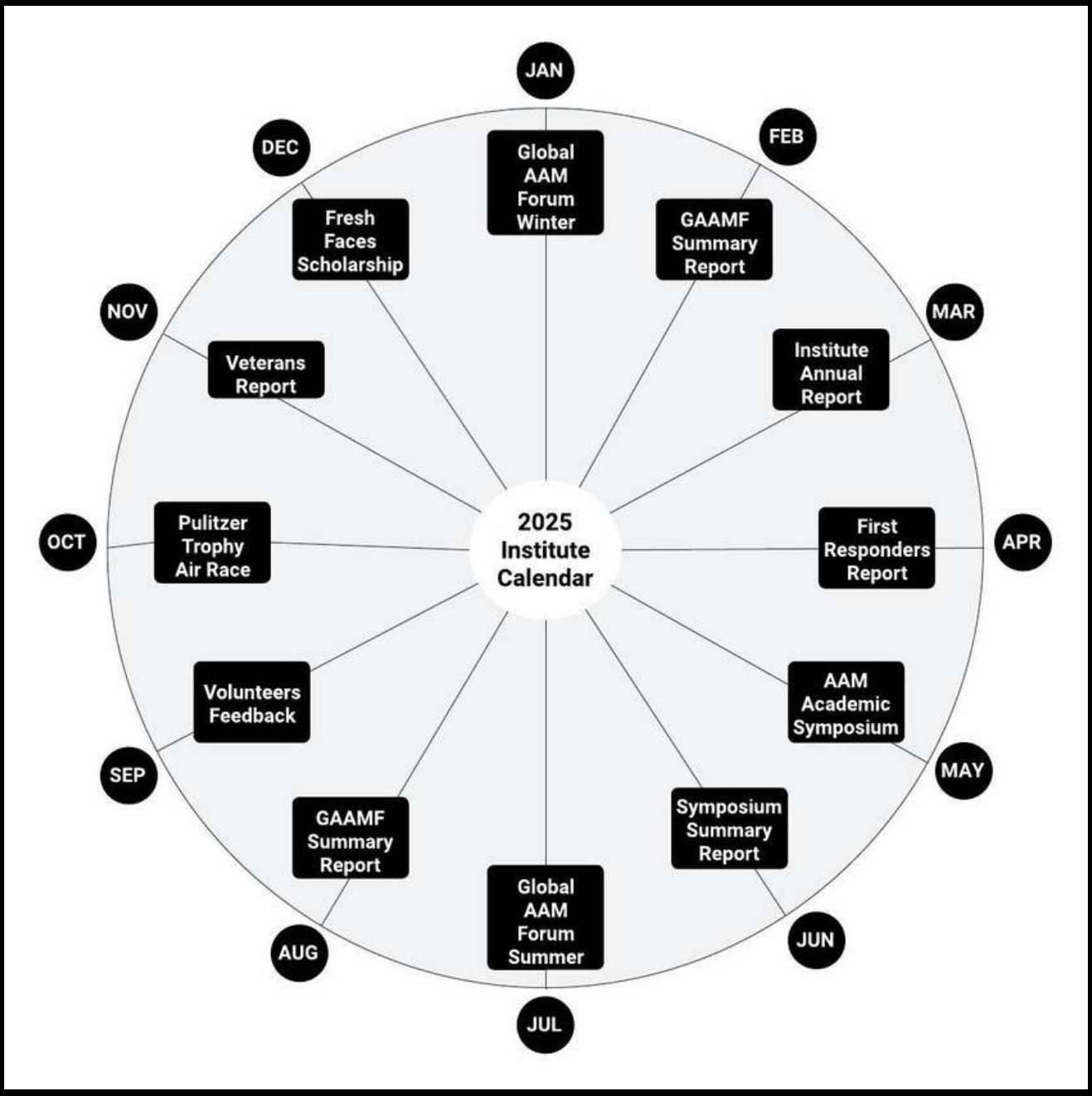

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