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Agenda Item 4: Emerging technologies, new business models and other associated aspects
4.1: Economic regulatory frameworks on emerging technologies

ECONOMIC REGULATORY PRINCIPLES FOR ADVANCED AIR MOBILITY AND UNMANNED AIRCRAFT

(Presented by Kazakhstan)

EXECUTIVE SUMMARY

Advanced air mobility (AAM) and unmanned aircraft (UA) are moving from trials to commercial service. Safety and airspace-integration work is well advanced, but the economic regulatory questions, including market entry, charges, access to vertiports and infrastructure, and support for service to remote areas, have received far less attention. This paper proposes that the International Civl Aviation Organization (ICAO) develop early, high-level and technology-neutral economic regulatory principles for these operations, complementing its technical work, so that the markets develop on a fair, consistent and accessible basis.

1. INTRODUCTION

1.1 Emerging technologies are reshaping air transport. Advanced air mobility (AAM) and unmanned aircraft (UA) systems are among the nearest to commercial deployment at scale, in passenger, cargo and public-service applications.

1.2 The International Civil Aviation Organization (ICAO) and States have devoted considerable effort to the safety certification and airspace integration of these operations, through the Remotely Piloted Aircraft Systems Panel (RPASP) andthe Advanced Air Mobility Study Group (AAM SG) established later following the 41st Session of the ICAO Assembly. The economic dimension, namely how these markets are entered, charged for and made accessible, is comparatively undeveloped.

1.3 For large, low-density States the economic question is not abstract. Kazakhstan has extensive remote areas where these technologies may offer connectivity that conventional services cannot provide on a commercial basis, and the economic rules will determine whether that potential is realized.

2. DISCUSSION

2.1 Without early common principles, States risk fragmented and divergent economic rules for AAM andUA, repeating the pattern that has complicated conventional air transport. Early alignment is easier to achieve than later harmonization.

2.2 The main economic questions include the conditions for market entry and designation; the basis for charges and for access to new ground infrastructure such as vertiports; fair and non-discriminatory access to that infrastructure, particularly where it is privately developed; and whether and how to support services to remote and under-served communities, for which these technologies are well suited.

2.3 ICAO's established policies on charges and on the economic regulation of air transport provide a foundation that can be adapted rather than rebuilt. The principles of cost-relatedness, transparency, consultation and non-discrimination that already govern airport and air navigation charges translate directly to vertiports and to the services that support unmanned operations. The aim is a set of principles flexible enough to accommodate business models that are still emerging.

2.4 The principles should be high-level and technology-neutral, should complement the safety and airspace work under way, and should leave detailed implementation to States. They should be developed in coordination with ICAO's existing expert groups so that the economic and technical frameworks evolve together.

3. CONCLUSION

3.1 The economic regulation of advanced air mobility and unmanned aircraft is an emerging gap that will widen as these operations scale.

3.2 Early, high-level economic principles from ICAO would help these markets develop on a fair, consistent and accessible basis, including for remote-area connectivity.

3.3 The Conference is invited to note the information in this paper.

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