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

CHILE'S ADVANCED AIR MOBILITY WORKING GROUP: EXPERIENCE, APPROACHES AND ENABLING CONDITIONS FOR CROSS-SECTORAL GOVERNANCE AND EFFECTIVE PUBLIC-PRIVATE COLLABORATION

(Presented by Chile and endorsed by 18 LACAC Member States[2])

EXECUTIVE SUMMARY

This working paper outlines Chile's experience in establishing and operating an Advanced Air Mobility Working Group (AAM Working Group), a technical cross-sectoral advisory body established by agreement among Chile's aviation authorities as part of its National Multisectoral Plan for Advanced Air Mobility (AAM). The paper describes the AAM Working Group's nature, governance, principles and participation criteria, as well as the enabling conditions identified for the progressive and safe development of AAM, with a focus on public-private collaboration arrangements used to date and lessons learned through their implementation.

Action: The Conference is invited to:

a) note Chile's experience in designing and operating an AAM Working Group as a technical cross-sectoral advisory and non-binding governance body supporting the implementation of AAM;
b) encourage States currently developing, or planning to develop, national AAM frameworks to consider establishing collaborative governance bodies that include the civil aviation authority, other government agencies, operators, manufacturers, academia and civil society, based on clear criteria to ensure representation, phased implementation, transparency and the prevention of conflicts of interest, in order to support effective public-private collaboration arrangements; and
c) invite the International Civil Aviation Organization (ICAO) to continue leveraging its existing mechanisms to help States share experiences, approaches and best practices in cross-sectoral governance models and enabling conditions for the safe, orderly and collaborative development of AAM, including public-private collaboration.

Strategic Goal:	This working paper relates to Strategic Goal: *The Economic Development of Air Transport Assures the Delivery of Economic Prosperity and Societal Well-Being for All*
Financial implications:	No financial implications for ICAO.
References:	Doc 10019, *Manual on Remotely Piloted Aircraft Systems (RPAS)* ICAO UTM Framework

[1] Spanish version provided by Chile.

[2] Argentina, Belize, Bolivia (Plurinational State of), Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Guyana, Honduras, Jamaica, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela (Bolivarian Republic of).

1. INTRODUCTION

1.1 Advanced Air Mobility (AAM), including uncrewed aircraft systems (UAS/drones) and piloted or unpiloted electric vertical take-off and landing (eVTOL) aircraft, represents one of the most significant developments in air transport over the coming decade. Its safe and orderly development requires enabling regulatory frameworks, safe airspace management, appropriate supporting infrastructure and, more broadly, effective coordination arrangements among the civil aviation authority, other government agencies, industry, academia and civil society.

1.2 Recognizing this challenge, in 2023 Chile's air transport authority established a working group to address the emerging but rapidly evolving use of eVTOL aircraft. This initiative later developed into the current Advanced Air Mobility Working Group (AAM Working Group), an inter-agency forum bringing together representatives of government agencies, operators, academia, civil society, manufacturers and technology providers who worked collaboratively to develop the Multisectoral Plan for the Implementation of AAM in Chile.

1.3 Against this backdrop, Chile wishes to share its experience designing and operating this coordination body. This working paper describes its nature, governance structure, membership and representation criteria, as well as the enabling conditions for the safe and progressive development of AAM. Particular attention is given to the public-private collaboration arrangements used to date, recognizing that technical evidence, public acceptance, and private-sector resources and capabilities are essential to the successful and sustainable implementation of AAM.

2. DISCUSSION

2.1 **Nature and Guiding Principles of the AAM Working Group.** The AAM Working Group is intended to serve as a technical, advisory, collaborative and non-binding body, with its conclusions, reports and recommendations having no binding effect on the aviation authority or other government agencies unless formally adopted by appropriate administrative action. The Working Group follows a gradual approach, in line with the phases, maturity levels and priority applications identified in the Multisectoral Plan, and is guided by a set of core principles, including safety, gradual deployment, responsible innovation, interoperability with the ATM system and future UTM/AUTM systems, sustainability, transparency and public trust, competitive neutrality to prevent the Working Group from becoming a forum for commercial advantage or regulatory capture, and balanced representation of the public sector, private sector, academia and civil society.

2.2 **Scope and Priority Applications.** The AAM Working Group focuses on seven applications that Chile considers top priorities: emergency biomedical cargo transport, air taxi services, aerial inspection and monitoring, support for productive activities, public safety, aerial survey, and on-demand small-package delivery. It is also structured around eight enabling pillars: regulatory framework and governance; community integration; airspace design and implementation; infrastructure and ground support; vehicle development, manufacturing and certification; operations management; ATM/UTM air traffic management; and business models and financing. The AAM Working Group does not supersede the statutory responsibilities of the aviation authority or other government bodies. Rather, its role is to foster coordination, gather evidence and develop technical proposals, while decision-making, oversight and regulatory functions remain with the competent authorities.

2.3 **Governance Structure.** The Working Group's governance structure comprises four complementary layers combining broad-based legitimacy, strategic direction, administrative continuity and technical expertise:

a) AAM Working Group Plenary: A broad-based engagement forum for all formally recognized stakeholders that reviews progress under the Plan, validates overall priorities, receives reports from the other bodies and issues non-binding recommendations;

b) Steering Group: A small strategic leadership body, chaired by the aviation authority and comprising designated representatives and alternates from each of the five sectoral groups (government agencies, operators, academia and R&D centers, civil society, and manufacturers and technology providers). It sets priorities, approves annual plans, proposes ad hoc groups and submits recommendations to the aviation authority, but has no power to adopt regulations, authorize operations or make administrative decisions on its behalf;

c) Technical Secretariat: An administrative and technical support unit within the aviation authority that convenes meetings, prepares meeting records, manages the document repository and follows up on agreed actions; and

d) Ad Hoc Groups: Groups established on a temporary basis with clearly defined mandates, deliverables and timelines to address specific technical areas (e.g. regulation and certification; airspace and ATM/UTM; infrastructure and land use planning; pilot projects and regulatory sandboxes; public acceptance, privacy and communications; business models and financing; and data, cybersecurity and interoperability).

2.4 **Stakeholders and Public-Private Collaboration.** The AAM Working Group brings together five stakeholder groups: government agencies, operators, academia and R&D centers, civil society, and manufacturers and technology providers, each playing a distinct role in the process. Government agencies define responsibilities, priorities and regulatory requirements; operators contribute operational expertise and participate in pilot projects; academia contributes technical evidence and evaluation methodologies; civil society articulates public expectations and acceptance criteria; and manufacturers provide technical capabilities and support the development of standards. Building on this foundation, the Multisectoral Plan has promoted concrete public-private collaboration arrangements, including calls for proposals and competitive tenders open to public-private consortia for the development of pilot projects and technological solutions; international partnerships with leading countries in the field; engagement with development banks, venture capital firms and innovation funds to mobilize additional financing and complement public-sector investment; and early collaboration with regional and local governments, particularly in designated pilot cities, to support the development of a vertiport network and updates to land-use planning instruments.

2.5 **Membership and Representation Criteria.** Membership in the AAM Working Group is subject to a formal procedure, documented by the Technical Secretariat and approved by the Steering Group, which includes four categories of participation: permanent member, invited expert, observer, and pilot project collaborator. The procedure requires applicants to submit a formal application, designate primary and alternate representatives, disclose their area of interest and any potential conflicts of interest, and agree to rules on confidentiality, integrity and data processing. Applications are assessed against several criteria, including alignment with the objectives of the Multisectoral Plan, demonstrable technical or territorial contribution, effective representation of the relevant stakeholder group, and the need to maintain a balanced composition across stakeholder categories, ensuring that no particular commercial interests are overrepresented.

2.6 **Enabling Conditions for the Development of AAM.** Chile's roadmap charts a path from the current level of maturity, limited to testing in controlled environments, to the full commercialization of priority applications by 2035 in three phases: Foundations and Pilot Projects (2026–2027); Controlled Expansion and Early Commercial Operations (2028–2031); and Commercial Consolidation and Scaling

(2032–2035). Progression from one phase to the next is contingent upon meeting six measurable enabling conditions that the AAM Working Group uses as progress indicators:

a) a minimum regulatory framework, including clear rules for BVLOS operations, remote identification, operational approvals, insurance, liability, and data protection, before operations can be scaled up;

b) an operational baseline UTM system, including core registration, authorization, monitoring, and ATM coordination capabilities, before allowing simultaneous operations;

c) validated pilot infrastructure, including take-off and landing sites, charging facilities, maintenance services and ground access arrangements consistent with urban planning frameworks, before scaling up services;

d) a minimum level of public acceptance, informed by assessments of noise impacts, privacy, perceived safety, and public participation, before operations are permitted over densely populated urban areas;

e) a viable business and financing model, informed by assessments of demand, costs, pricing, financing options and public benefits, before the start of commercial operations; and

f) sufficient institutional capacity in Chile's Directorate General of Civil Aviation (DGAC) and participating organizations, including inspectors, procedures, digital tools, and inter-agency coordination.

2.7 **Lessons Learned and Best Practices.** Drawing on the experience of the United States, the European Union, Japan, the Republic of Korea and, in particular, Brazil as a regional benchmark, the AAM Working Group identified lessons that now inform Chile's approach, including the importance of aligning national regulations with emerging international standards; the benefits of leveraging existing infrastructure in the early stages, including heliports and aerodromes; the importance of early engagement with local governments; the value of interim regulatory frameworks and regulatory sandbox programmes for testing new concepts in controlled environments under the oversight of the aviation authority, while remaining subject to the required approvals and certifications; and the benefits of fostering a local industry capable of supplying components and services to the AAM ecosystem. The experience of the AAM Working Group also underscores the importance of striking a balance between transparency as a general principle and the protection of sensitive operational, commercial and personal information in order to maintain the confidence of private-sector participants that contribute proprietary information to the process. Similarly, efforts should be made to identify and communicate the benefits that these new technologies can bring to communities in order to promote public acceptance.

3. CONCLUSION

3.1 Chile's experience demonstrates that it is possible to build trust between public- and private-sector stakeholders, develop a strong technical evidence base, and move gradually and safely towards the integration of a new and transformative technology such as AAM through a structured, non-binding and cross-sectoral governance model, with clearly defined roles, representation criteria and participation rules, while preserving the regulatory, oversight and standard-setting responsibilities of the aviation authority.

3.2 Public-private collaboration, channeled through pilot-project consortia, international partnerships, co-financing mechanisms and early engagement with local governments, is a cross-cutting enabler, no less important than the regulatory framework, infrastructure or public acceptance in supporting the orderly deployment of AAM. In light of the above, Chile reaffirms its commitment to continue sharing its experience and best practices with other States and with the International Civil Aviation Organization (ICAO) and views this Conference as an appropriate forum for fostering discussion on cross-sectoral governance and enabling conditions that support the safe, coordinated and collaborative development of AAM worldwide.

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