

# GUTMA UTM Ecosystems' Readiness Task Force



EASA Innovative Air Mobility Implementation Forum, Cologne, 23rd October, 2024



### **GUTMA Task Force - UTM Ecosystems' Readiness Index**

**Objective**: Collect information and assess the maturity of national UTM ecosystems around the world









July 2024: kick-off

July-October 2024: GUTMA Task Force activity November 2024: GUTMA Harmonized Skies Establish an annual GUTMA UTM Ecosystems' Readiness Index

GUTMA Board's approval and invitation to all members to join the **Task Force** 

To engage with a diverse range of respondents, and to present first findings for Europe at the EASA IAMIF in Cologne

To present final results at the GUTMA Harmonized Skies 2024 in Dallas, Fort-Worth To establish an annual update within the GUTMA Harmonized Skies





### **GUTMA Task Force - methodology powered by**



#### **Fundamental UTM Ecosystem's Dimensions**

Legislation





How developed is the regulatory framework concerning UAS operations or UTM relating to operational, as well as technical. governance and economical aspects?

Governance



How diverse is the collaboration between public and private stakeholders in UTM ecosystem decision-making (such as structure, roles, financing, etc.)? **Strategy** 





Do the stakeholders have **clear visions**, objectives and approaches, supported by a detailed strategic document, to develop the UTM ecosystem?

**Operations** 





How designed are the operational methods to enable and sustain the commercial and scalable BVLOS drone services within the UTM ecosystem?

**Technology** 

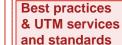




What operational **UTM** tools have been implemented to enable and sustain commercial and scalable BVLOS drone services within the UTM ecosystem?

**Business** & Market





Identifying best practices to open commercial and scalable BVLOS drone services market, with the collection of **UTM** services and standards.

What is the maturity of stakeholders' economic understanding of the low-altitude economy within the UTM ecosystem?

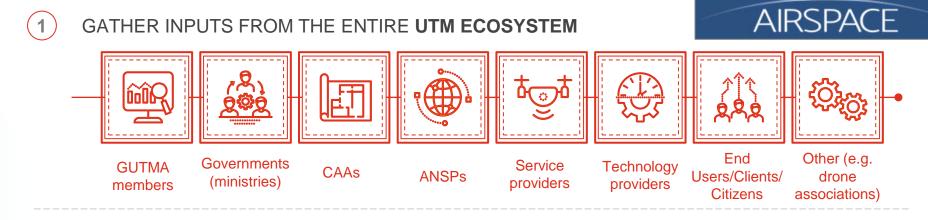


Sources: PwC & PwC Strategy&

### **UTM Ecosystems' Readiness Questionnaire**

Information has been collected via various sources including a Online questionnaire and cooperation with Unmanned Airspace and other drone association





2 ASSESS UTM ECOSYSTEM MATURITY OF ALL DIMENSIONS THROUGH A SCORING MATRIX



3 COMBINE DIVERSE STAKEHOLDER INSIGHTS LIKE BEST PRACTICES, AND UTM SERVICES AND STANDARDS





Sources: PwC & PwC Strategy&

## **UTM Ecosystems' Readiness Questionnaire**

Access the questionnaire by scanning the QR code.







#### **GUTMA Task Force first conclusions for Europe**

#### Half Way Through UAS Operations and the Beginning of the U-Space Implementation

Legislation





There is a **slow** progress in the national implementation of the **EU Basic Regulations**, with just few ongoing legislative processes for the EU U-Space Regulations 2021/664-666.

Governance

There is an insufficient

culture of cooperation

between public

UTM services

companies, etc.)

stakeholders.

(ministries, CAAs,

ANSPs) and private

(associations, drone &



**Strategy** 





There is a lack of strategic documents at the organisational and national levels addressing the U-Space implementation/lowaltitude economy with existing ones being outdated.

**Operations** 

The implementation of

often related to the UTM

advancement. There are

only few ongoing U-

**Space airspaces** 

implementations.

drone (geo)zones is

technological



**Technology** 





**Business &** Market

There is a minor use of

tools (market sizing,

value chain mapping,

business plans), and

thus a low economic

understanding of the

low-altitude economy.

pricing strategies,



**Best practices** & UTM services and standards

To be presented at the **GUTMA Harmonized** Skies 2024.



There are mostly basic airspace (geo-)awareness tools implemented, with only few advanced UTM systems. There are only few ongoing U-Space systems implementations.





Sources: GUTMA

# Thank you



#### Sebastian Babiarz co- President GUTMA



+48 882 404 111



sebastian.babiarz@droneup.com



LinkedIn



#### **Tomasz Kłosowicz**

**Vice Director** 

**PwC Drone Powered Solutions** 



+48 519 504 273



tomasz.klosowicz@pwc.com



Linkedlı

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