EASA HIGH LEVEL CONFERENCE

JEDA Competence Group 1 European regulation implementation 22 October 2024

Preliminary survey results

Agenda

1. **Why this survey? Who responded?**
2. **Specific insights**
3. **Outlook**

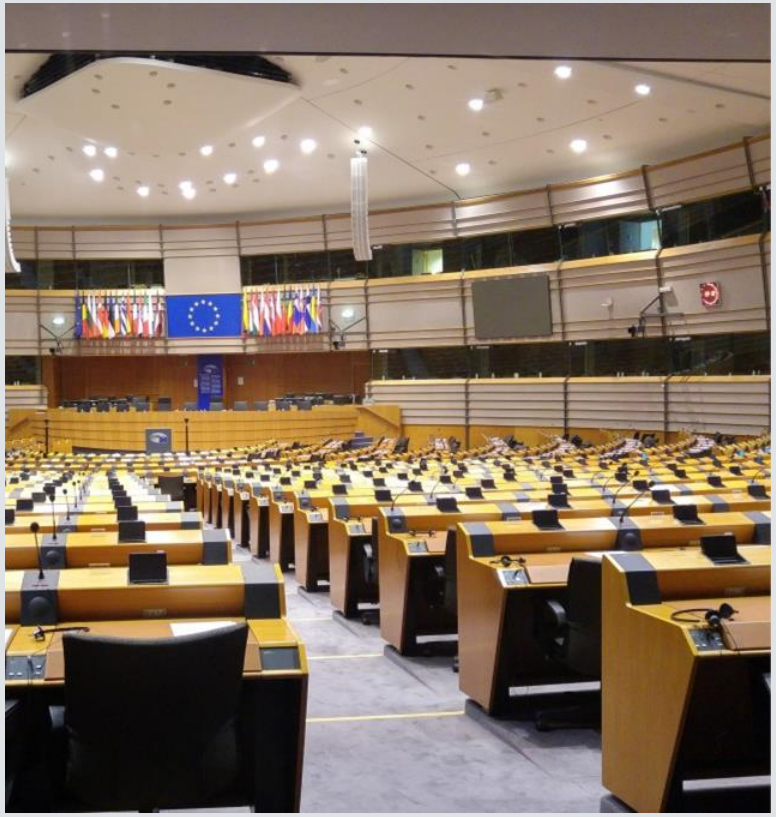
<u>Speakers</u>

- **Philippe BOYADJIS, JEDA Vice-President**
- **Stefan HRISTOZOV, JEDA Secretary**

<u>With JEDA Competence Group 1 Members (*thanks!*)</u>

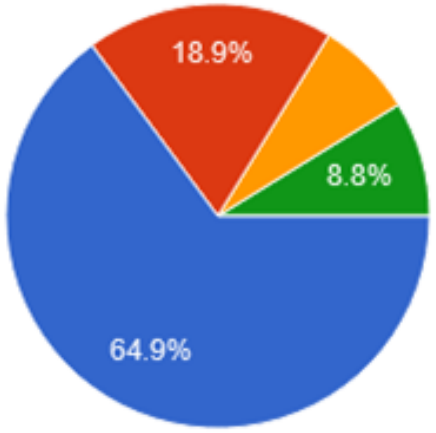
- **Armin Ambühl**
- **Julie Garland**
- **Pierre-Alain Marchand**
- **Vidmantas Kairys**

Why this survey?

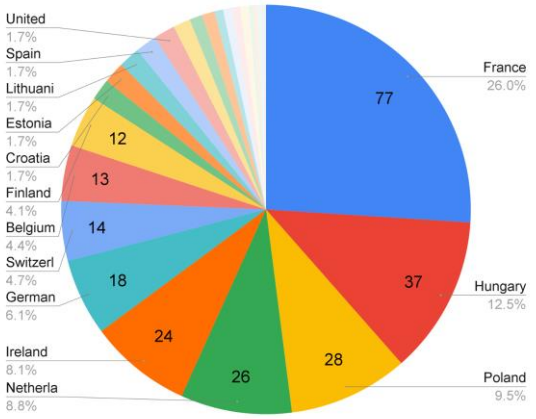


- Obtain **feedback from operators and all stakeholders** regarding the implementation of European drone regulation
- Enable **EASA** to facilitate listening to drone operators, by **centralizing feedback**,
  Part of 2024 EASA/JEDA MEMORANDUM OF COOPERATION
- Explore with the drone community concrete **ways of improving the regulation** to support the development of the European drone sector

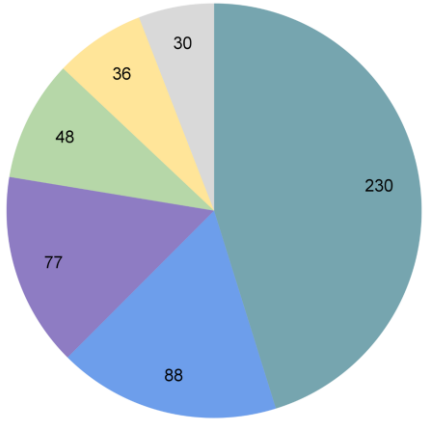
Who responded?



- 300 responses, with distribution by **structure size**
  - Micro (1-9 employees)
  - Small (10-49 employees)
  - Medium (50-249 employees)
  - Large (250+ employees)



- Responses from **25 countries**
- Broad country representation achieved

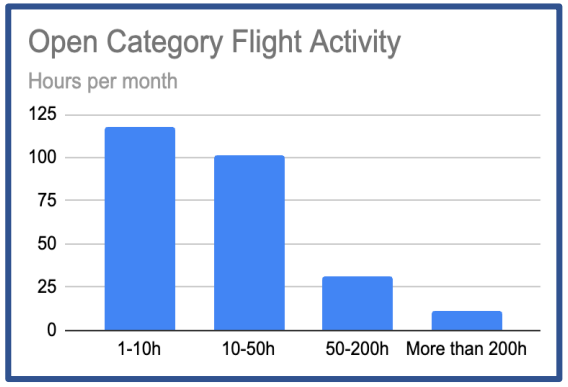


- Diversity reflecting **diversity of market activities**
  - Operator
  - Service provider
  - Training organization
  - Manufacturer
  - Research Institution
  - Other

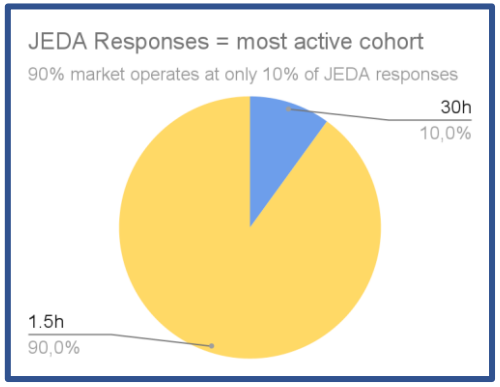
- 250 / 300 respondents have left very detailed comments
- Processing still ongoing, giving you **first trends today**

Open Category - Flight Activity Data

25h: Median flight hours
From survey, per month

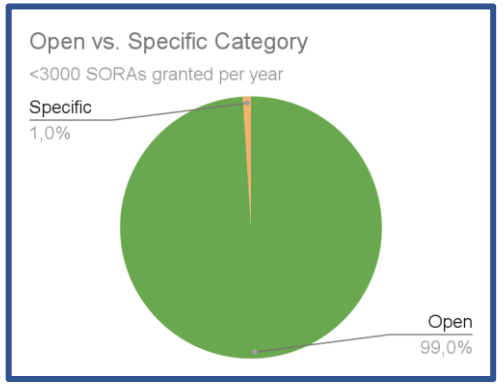


Median operator flies much less than median JEDA survey
Assumption



1.6M registered operators
From EASA IAM (incl. recreational)

99% activity in Open Cat.
From EASA IAM (incl. recreational)



Highlights - Topic 1
Inconsistent implementation across member states

Summarized challenges

- **Inconsistent implementation** of drone regulations across EU countries.
- **Additional** country-specific **restrictions** and complicated cross-border operations.
- Complexity & lack of enforcement → **unfair competition** by non-compliance.

Survey quotes

- "The harmonization was intended to make operations easier, [...] **each country places its own rules on top of the EASA rules**, it becomes an impossible web of rules, which has not helped at all."
- "[...] each NAA then puts there own little spin them to comply with their countries laws [...]".
- "please align UAS regulation within all EU countries. I can't understand that we still have different regulation in [...]"
- "**Every country interprets regulations in their own manner and use this to restrict operations**. For example [..] insistence on Flight termination systems, [...] BVLOS outside atypical airspace is forbidden [...] "
- "This creates a market for **smaller independent operators to assume the risk of breaking the rules** [...]"
- "The effort [...] is currently so high (including generic SORA) that providers paying less attention to compliance often **offer at significantly lower prices**."

Highlights - Topic 2
Cost and complexity not appropriate to the risk

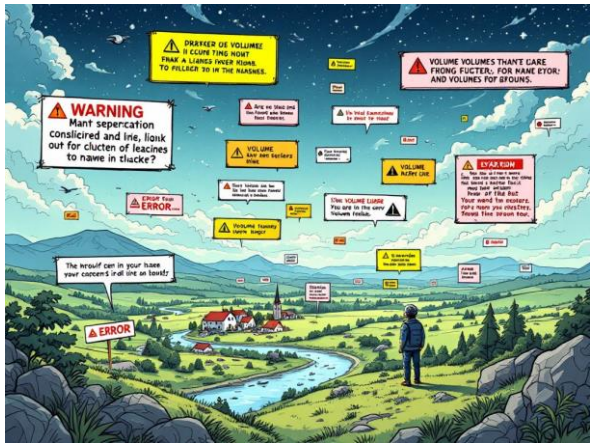
Summarized challenge

- Cost & complexity of regulations **disproportionate to actual risks**.
- Restrictions in Open Category and buffer zones hindering **business operations**.
- Time-consuming and costly **authorization processes discouraging investment**.

Survey quotes

- "The regulations are **so complex [...] had to hire an external consultant at huge expense**"
- "Large corporations can not utilize the technology [...] highly unprofitable."
- "Restrictions in Open Category for flights over uninvolved are non sense and are killing business for drone operations."
- "Clearly defining the population densities for the Open A3 150m buffers"
- "NAAs take **months to actually get permissions in place - you can run out of money before getting a permission to operate in the specific category** "
- "Process of applying permissions from CAA takes too much time with SORA methodology."
- "From an economic perspective, the legislation **discourages investment** in advanced drone technology."

Highlights - Topic 3
Geozones - and progress to advanced use-cases



Summarized challenges

- **Excessive Geozones** inhibiting operations in Open & Specific
- **Limited geographical flexibility** for operational permissions (**SORA**).
- Not fast enough progress on scalable progress (BVLOS), as well as common **specific use cases** like agriculture, tethered and swarming drones.

Survey quotes

- "**Excessive geozones** due to the authority for airspace management being delegated to local authorities"
- "[...] too many geozones with arbitrary rules. "
- "[...] **SORA or PDRA but those are location bound**"
- "[SORA] is required in too many circumstanced that already have switched from rare to popular (agricultural, swarming)."
- "The SORA process is killing industry"
- "**BVLOS: each country has its own rules**. [...] different requirements that are not always compatible."
- "It is more straightforward for me to go to an airport and hire an airplane with my PPL than it is to fly a drone in many instances."
- "Make sure that the Specific category not overregulated. Ensure that the set safety level goals are achieved, but **not overachieved by more and more rules. You will otherwise kill an industry or let it move abroad the EU**."

Next steps

Survey quotes

- “" Just because we face a **challenge** we don’t see it as something negative. Some of the regulatory challenges has put out organization at test and **made it possible** to get where we are today"”

- **Great job done since 2019** regulation
- Operators and other stakeholders provided **feedback through this survey**
- With members of **JEDA**, **EASA** and all our **partners**
- Let's work together to identify the **challenges and proposals**
- **within a short time, let’s improve collectively drone industry and activities**

Thank you

Go raibh maith agat

Merci vilmal

Köszönöm szépen

Grazie

Kiitos

Multumesc

Merci

Aitäh

Faleminderit

Hvala

Vielen Dank

Obrigado

Dank u wel

Dėkui

Paldies

Gracias

Ευχαριστώ

Villmools merci

Благодаря