

# GUTMA

## Global UTM Association *From ATM to UTM*

*Koen de Vos – GUTMA Secretary General  
ICAO DRONE ENABLE Symposium 2022*



# From ATM to UTM: from fixed phone lines to the internet



## Aviation 1.0: Analogue

**Human centric**  
**Human limitations**  
**Natural monopoly**  
**Transport**



## Aviation 2.0: Digital

**Operation centric**  
**Scalable**  
**Competition**  
**Drone services**

# The drone service market value pyramid

## TRADITIONAL AVIATION MARKET

ATM MARKET

AIRCRAFT OPERATIONS

FINAL CUSTOMERS

Airlines

AAM Global  
\$1.5tn market  
by 2040

## DRONE SERVICE ECOSYSTEM

### U-SPACE SERVICES MARKET

**Drone Operations Market: Transport Passengers  
Transport Goods  
Transport Data**

### Drone SERVICES Market

AI Applications Big  
Data Analysis  
Reporting

Flying public  
+  
cargo

Flying public  
+  
cargo

WHOLE  
ECONOMY

U-Space induced value



HARMONIZED SKIES 2022

US UTM CONFERENCE

THE US WAY - FROM EXEMPTION TO RULE

13-14 December 2022

Virtual conference



#HarmonizedSkies2022

Main event partner



Sponsors



# Thank you

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