Australian Government
Civil Aviation Safety Authority
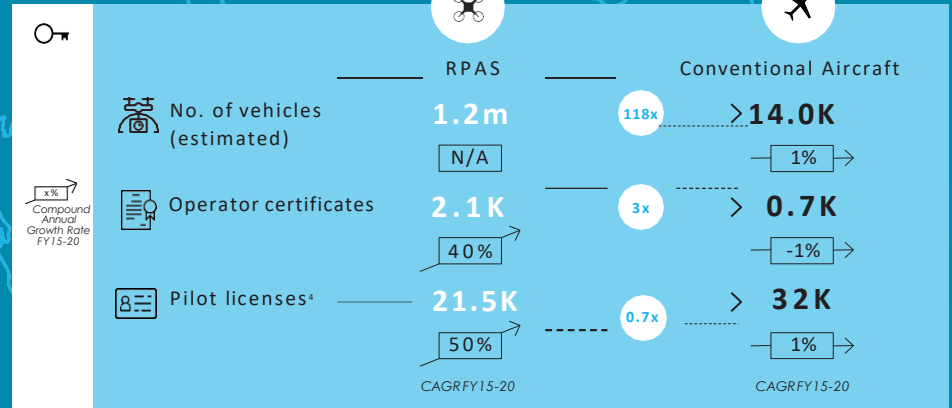
APAC Connected Drone Workshop

Integration of Mobile, Aviation and Drone Industries

August 2021

RPAS in Australia

The rate of drone ownership in America, covering all types of uses, is approximately 8 per cent. A conservative estimate of 5 per cent of Australians owning a drone, would see over 1.2 million drones operating in Australia [1]

Timeline of RPAS & AAM milestones in Australia

2002	Australia is the first nation to establish RPAS regulation
2016	Introduction of excluded category for sub 2kg RPAS
2017	Dedicated RPAS branch established by CASA
2019	Launched the world's first commercial drone delivery service
2020	RPAS Platform established, Drone Registration & Operator Accreditation launched
2021	Automated airspace authorisations trial

RPAS industry 'by the numbers'[2]

	RPAS		Conventional Aircraft
No. of vehicles (estimated)	1.2m	118x	14.0K
	N/A		1%
Operator certificates	2.1K	3x	0.7K
	40%		-1%
Pilot licenses[4]	21.5K	0.7x	32K
	50%		1%

Compound Annual Growth Rate FY15-20

CAGR FY15-20 | CAGR FY15-20

Industry Projections

HORIZON 1
Short term
over next ~5 years

Trials and early operations of new aircraft types and services, occurring in limited locations around Australia.

- Multiple and concurrent drone operations in the same airspace;
- Commencement of initial eVTOL operations; and
- Design, development and implementation of the first phase of a national unmanned traffic management (UTM) system.
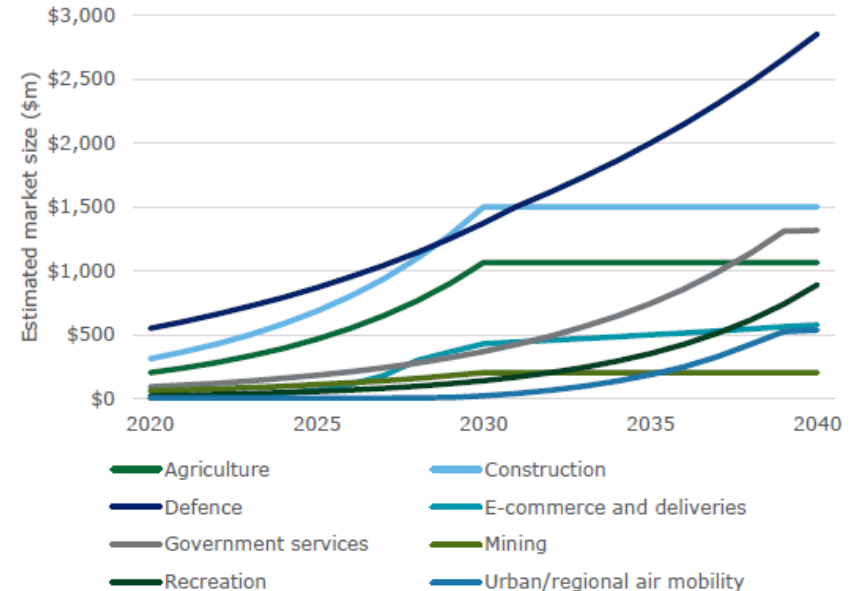
HORIZON 2
Medium term
~5–10 years

Industry continues to mature with increasing volumes of new aircraft and services operating in a range of locations, supported by new infrastructure.

- Implementation of UTM to manage a broad range of risks and impacts;
- Complete integration of eVTOL operations with UTM system;
- eVTOL operations in regional areas; and
- Increased automation of eVTOL and drone operations.

Estimated market size by compelling use cases, 2020 to 2040 (medium uptake scenario)

Legend:
- Agriculture
- Construction
- Defence
- E-commerce and deliveries
- Government services
- Mining
- Recreation
- Urban/regional air mobility

Australian government framework

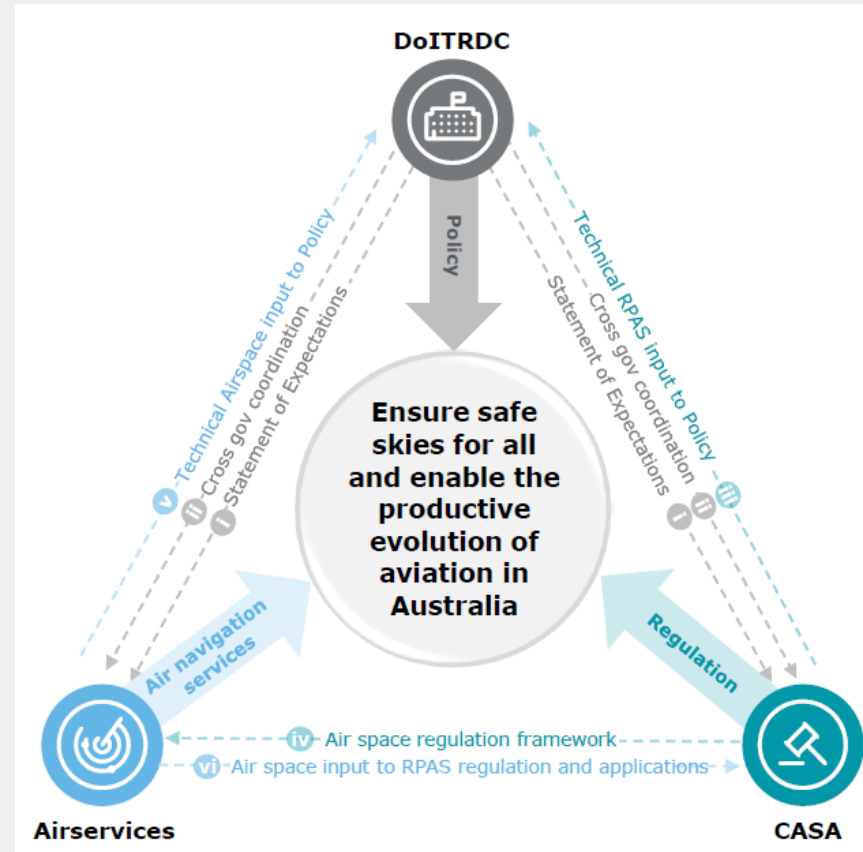**The Department of Infrastructure, Transport, Regional Development and Communications.**

Policy Development: Establish and oversee the direction of Australian aviation in line with macro governmental economic and societal objectives

Civil Aviation Safety Authority

Regulation implementation and oversight: Ensuring an effective safety regulation framework and providing regulatory oversight whilst enabling flexibility in innovation

Airservices Australia

Provide air navigation services: Air navigation, aviation rescue and fire fighting services

National Emerging Aviation Technologies Policy Statement (May 2021)

14 Key initiatives

1. Drone Rule Management System
2. Develop a coordinated approach to enforcement
3. National Drone Detection Network
4. Infrastructure Planning framework
5. UTM Action Plan
6. Flight Information Management System
7. Aviation Safety Regulatory Road Map

8. Australia's Future Airspace Framework
9. Noise framework
10. Privacy guidance
11. Security measures
12. Emerging Aviation Technology Partnerships Program
13. Best-practice procurement
14. Drone Information Hub