



# The Spanish RPAS Sector Opportunities & Challenges

Manuel Oñate

AERPAS

January 28<sup>th</sup> 2014

# This is big

- You know something big is happening when **250+ people** gather in the same rooms for three days, at such a short notice.
- You know it is a good thing when **all** the organisations we invited have agreed to come.
- I would like to thank you all for your support on this Workshop which I am sure will be an **important landmark** for the industry.

# Why I think this is big

- The short answer is:

**Because RPAS are the future of aviation**

- The question is not **if** unmanned aviation will ever surpass manned aviation but **when**.



# Spot the difference



1990's



2013

# A paradigm change

What the digital revolution implies:

- **Very short** development **timeframe** (years, not decades).
- **Explosive growth**: number of systems, operators, applications ...
- We can't even imagine what the **killer application(s)** will be.

# An opportunity for Spain

- **We have the capabilities:**
  - Technological (highly experienced research centres)
  - Industrial (aeronautical auxiliary industry already established)
  - Financial (programs in the 10's M€, not 1,000's M€)
- **And we have the conditions:**
  - Climate
  - Low population density, coastal length

***Spain has all the ingredients required to become a leading country in this new technology***

# A proposal

- Take advantage of our **competitive advantages**:
  - Qualification and training.
  - Test flights.
  - Easy(ier) access to airspace.
  - BLOS operations – the next frontier.
- Base our development in those sectors in which we have a **Strong position**:
  - Infrastructure and disaster monitoring.
  - Latin America and Middle East.



# Sensible use of funds

- Most of the proposed measures cost (almost) **no money**.
- What the industry really needs is leadership and support:
  - A **clear** and **agile** regulation.
  - **Creative thinking** to overcome difficulties.
  - Public-Private **cooperation**.
  - **Timing** is key.
- A little money also helps:
  - Use the already **existing** research **programmes**.
  - **Governmental operations** to bootstrap the market (and save some money with it).

# Challenges? What challenges?

- We are not the first, but we are in the leading group.
- We need to collaborate.
- Overcome inertia: the first step is the hardest.
- Be patient, slow and steady wins the race.

# A way forward

- We can **learn** from the **experience** of others:
  - Copy what works.
  - Avoid what doesn't.
- If we think this is **strategic** for Spain, **act** accordingly.
  - Involve all **key stakeholders** (Spanish Roadmap).
  - Establish realistic **objectives** and pursue them **actively**.

