

U.S. Trends in AAM Policy and Related Developments

~Advanced Air Mobility National Strategy 2025~

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1. Overview

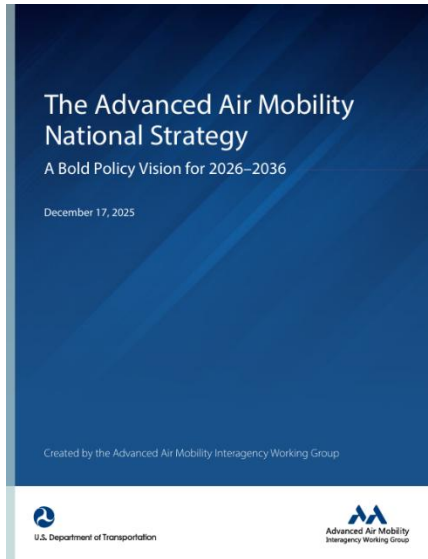
In fiscal year 2025, significant progress was made toward the social implementation of Advanced Air Mobility (AAM) in Japan. Demonstration flights of multiple types of AAM aircraft were conducted at the Expo 2025 Osaka, Kansai, allowing many visitors to gain an understanding of the current state of the technology and significantly raising public awareness of AAM. Furthermore, in March 2026, the Public-Private Committee for Advanced Air Mobility revised the “Advanced Air Mobility Roadmap” and the “Concept of Operations for Advanced Air Mobility (ConOps for AAM)¹⁾,” outlining a more detailed plan for AAM leading up to the 2040s. This marked a major policy advancement, including the decision to use the term “空飛ぶクルマ (AAM)” instead of simply “空飛ぶクルマ” (a direct English translation being flying car), with the internationally recognized AAM acronym included in the new terminology.

Meanwhile, in the United States, major announcements regarding AAM were made between late 2025 and early 2026. In December 2025, the U.S. Department of Transportation (DOT) released the Advanced Air Mobility National Strategy 2025²⁾, a national blueprint for AAM through 2036, and the accompanying Advanced Air Mobility Comprehensive Plan 2025³⁾ outlined a vision and action plan for the societal implementation of AAM for the same timeframe. In addition, in March 2026, the Federal Aviation Administration (FAA) announced that it had selected the first eight proposals for the Electric Vertical Takeoff and Landing (eVTOL) Integration Pilot Program (eIPP) based on the June 6, 2025, Executive Order UNLEASHING AMERICAN DRONE DOMINANCE. Going forward, these developments are expected to further advance U.S. policies aimed at the social implementation of AAM.

This report provides an overview of the Advanced Air Mobility National Strategy 2025, which serves as a core framework for the U.S. government’s AAM policies.

2. Advanced Air Mobility National Strategy 2025

In October 2022, the Advanced Air Mobility Coordination and Leadership Act⁶⁾ was enacted with the aim of having the federal government take the lead in advancing AAM and promoting interagency cooperation. This led to the establishment of a federal-wide AAM working group (Advanced Air Mobility Interagency Working Group: AAM IWG) created to formulate a national strategy for AAM (see details of these items are written in Fujimaki’s report⁷⁾ and Tsuru’s presentation materials⁸⁾, works by former JITTI researchers). The AAM IWG, comprising of 19 federal agencies including the DOT, FAA, National Aeronautics and Space Administration (NASA), Department of Commerce, and Department of Defense, conducted discussions and published the national strategy on December 17th, 2025. This was after the deadline set by original Act⁶⁾ but there was an extension provided by the Federal Aviation Administration Reauthorization Act of 2024⁹⁾.



Source: Excerpt from Advanced Air Mobility National Strategy 2025

Figure 1: Advanced Air Mobility National Strategy 2025

The Advanced Air Mobility National Strategy 2025 identifies eight use cases for AAM—including transportation to areas with limited mobility, access to airports, regional transportation, and air taxis (Table 1)—and divides the strategy for the societal implementation of AAM from 2026 to 2036 into three phases, clearly stating the implementation goals for each phase (Table 2). Additionally, it outlines the following objectives: (1) Position the United States as a global leader in AAM; (2) Maintain high levels of safety, security, and national defense; (3) Encourage smart and timely private investment in the AAM sector and develop public-private cooperation models; (4) Enhance planning between and among all levels of government; (5) Achieve new public benefits over time, such as enhanced safety, mobility, economic development, accessibility, emergency management, and noise mitigation; (6) Optimize existing infrastructure to support AAM services; (7) Promote competition, market entry, and broad access to critical inputs in the U.S. market; (8) Expand the U.S. aviation workforce and diversify supply chains; and (9) Coordinate and increase effectiveness of government research and testing to support faster benefits for the U.S. industrial base.

Table 1: AAM Use Case on Advanced Air Mobility National Strategy 2025

Use case
– Travel Over Difficult Terrain
– Access to National Airports
– Regional Air Mobility (Washington, DC, to Manhattan in under 2 hours)
– Emergency Response (expand medical response to rural areas, assist in search and rescue, aid in natural disaster relief, and expedite organ delivery)
– Air Taxi
– Cargo Operations
– Skilled Aviation Workforce
– Military Transportation

Table 2: Goals on Advanced Air Mobility National Strategy 2025

Year	Goals
By 2027	<ul style="list-style-type: none"> – Demonstrations and initial operations by using airport infrastructure – Full U.S based supply chain
By 2030	<ul style="list-style-type: none"> – Air operations in multiple urban and rural areas – Construction of Vertiport using private funding – Low-altitude traffic management for AAM by utilizing full-scale air traffic modernization as envisioned in DOT
By 2035	<ul style="list-style-type: none"> – Fully autonomous flight

To achieve the aforementioned goals, this National Strategy establishes six pillars: Airspace, Infrastructure, Security, Community planning and engagement, Workforce, and Automation. For each pillar, the strategy identifies challenges and sets out a vision (goals), along with recommendations for necessary future actions based on these. It also includes recommendations on overarching issues (for a total of 40 recommendations).

While the National Strategy covers a wide range of topics, its main points are as follows (see Table 3 for details).

- The focus is on how to implement AAM in society while making maximum use of existing infrastructure and systems.

- While many factors must be considered for the social implementation of AAM, “airspace” is positioned as the first pillar. The strategy aims for integrated airspace management—including conventional aircraft—in low-altitude airspace, where high density is expected in the future due to the spread of AAM, while balancing safety and efficiency.
- In addition to pillars such as airspace, infrastructure (takeoff and landing sites, charging ports, CNS facilities, weather forecasting, etc.), and security, Community Planning and Engagement is identified as a key pillar, indicating that enhancing understanding and acceptance within local communities is essential for the success of AAM.
- The plan identifies Workforce as one of its pillars, aiming to secure the future workforce and establish the AAM industry as a sustainable sector over the long term.
- The plan does not merely treat automation as one of AAM’s future technologies but positions it as an independent pillar, aiming to establish the United States as the global leader in the field of automated flight and planning to create a roadmap for automated flight to achieve this goal.

		<p>efficiency, access, and economic competition</p> <ul style="list-style-type: none"> - Pioneer a new public-private cooperative model to manage low-altitude airspace, with a vision to integrate advanced aviation safely and efficiently with traditional aircraft - Modernize systems and management practices, to maximize the economic benefits of aviation for all Americans
	Recommendations	<p>1.1 Capitalize on existing modernization efforts to transform air traffic control systems and further enable all Federal air traffic controllers to provide services that ensure the safe, secure, and efficient use of dynamic and high-tempo airspace in the future.</p> <p>1.2 Support research, development, testing, and implementation of new surveillance solutions for low-altitude, high-density operations.</p> <p>1.3 Research new methods of communication between aircraft and air traffic management to enable air traffic to be more efficiently managed.</p> <p>1.4 Establish information exchange protocols, technology requirements, and security requirements for integrated updates to facilitate free flows of information among providers of air traffic management services in cooperative environments and other areas.</p> <p>1.5 Research and develop the requirements, roles, and responsibilities expected of third parties in complementary air traffic management and surveillance operations and the related regulatory framework.</p>
	2 Infras truct ure	<p>Primary components of infrastructure</p> <ul style="list-style-type: none"> - Physical Infrastructure: Landing facilities, buildings, and structures like airports, heliports, and vertiports must be built or modified to accommodate AAM operations for both vertical and short takeoff and landing aircraft; - Energy: Energy infrastructure is needed to charge or fuel AAM aircraft and support facilities and equipment; - Radio Spectrum: Future aviation

Table 3: 6 pillars on Advanced Air Mobility National Strategy 2025

Pillar	Challenges, Goals, Recommendations	Description
1 Airsp ace	Challenges	<ul style="list-style-type: none"> - Anticipated growth and demand for AAM that will strain existing infrastructure, procedures, and air traffic management capabilities - Current surveillance systems, communication methods, and decision support tools were originally designed for traditional aircraft operations - Insufficient information to support the FAA’s development of a regulatory scheme and adequate funding
	Goals	<ul style="list-style-type: none"> - Maintain and mature sound regulatory oversight of airspace safety, security,

	<p>operations will require modernization of Communications, Navigation, and Surveillance (CNS) technologies and systems and innovative solutions in radio spectrum to ensure safe, secure, and resilient CNS functions.</p> <ul style="list-style-type: none"> - Weather: New sensor arrays and services must improve detection, reporting, and prediction of low-altitude weather in environments that will impact AAM operations
Challenges	<ul style="list-style-type: none"> - A lack of performance and operational data needed to inform vertiport policy, perform site reviews to identify impacts to airspace use, and determine achievable separation minimums for aircraft - A lack of an existing framework to accommodate AAM into aviation infrastructure and energy infrastructure planning; - A lack of available radio communication frequencies. Strained capacity on existing congested Automatic Dependent Surveillance-Broadcast frequencies, - A need for improved precision weather detection and reporting networks.
Goals	<ul style="list-style-type: none"> - Adapt existing infrastructure for new uses and technologies, leveraging current assets for immediate benefits - Improve energy planning and distribution in aviation - Develop spectrum solutions for future mobility needs - Develop additional weather networks and forecasting capabilities - Achieve new levels of accessibility, competition, and interoperability
Recommendations	<p>2.1 Use existing regulations, standards, policies, and processes, where applicable, to encourage and facilitate the use of existing or repurposed infrastructure for near- and medium-term AAM operations.</p>

		<p>2.2 Engage with SLTT governments and industry on future models for planning and financing AAM infrastructure while funding existing programs for early operations.</p> <p>2.3 Identify facility and equipment requirements specific to remotely piloted/supervised and autonomous AAM aircraft at airports, vertiports, and heliports and assist with demand/capacity balancing of low-altitude airspace.</p> <p>2.4 Expand guidance on vertiport design.</p> <p>2.5 Research energy infrastructure needs for AAM, plan joint demonstrations that establish best practices, and work with industry to plan for ample energy distribution.</p> <p>2.6 Address aviation spectrum needs and spectrum bands for future airspace management transformation</p> <p>2.7 : Develop Complementary Positioning, Navigation, and Timing (CPNT) options.</p> <p>2.8 Develop enhanced weather detection, forecasting, and reporting network capabilities for AAM operations</p>
3	Security	<ul style="list-style-type: none"> - The ability and capacity to anticipate and respond to continually evolving safety and security threats - Insufficient operational information for assessing risks, because there have been no commercial operations to date - Statutory constraints on the availability of innovative security models for emerging aviation technology like AAM - Broad supply chain challenges affecting multiple industries that may also impact AAM
	Goals	<ul style="list-style-type: none"> - Apply existing security frameworks immediately as needed - Develop a risk-based approach to identify and address potential physical, personnel, and cybersecurity threats to AAM operations, with enhanced coordination between agencies - Develop resilient security measures for

		AAM manufacturing and service in the United States to promote independence and economic vitality
	Recommendations	<p>3.1 Apply existing security regulatory frameworks to initial AAM operations, where applicable, and assess risks to inform future security policy decisions.</p> <p>3.2 Monitor intelligence reports and conduct recurring security risk assessments, to guide policy decisions on future security measures needed to address risks.</p> <p>3.3 Utilize existing regulatory frameworks to ensure proper vetting of AAM pilots, ground crew, and anyone entering the sterile areas of federalized airports, while continuing risk analysis to assess any future vetting needs.</p> <p>3.4 For initial AAM operations, align physical screening requirements with existing TSA regulations and security programs, unless emergent risks dictate otherwise.</p> <p>3.5 Expand and extend the current TSA Reimbursable Screening Services Program (RSSP) or establish it as a permanent program to improve access.</p> <p>3.6 Establish a working group to evaluate AAM cyber security.</p> <p>3.7 Ensure agency Privacy Impact Assessments (PIAs) are updated as the AAM industry evolves and leverage best practices for cybersecurity in accordance with the National Institute of Standards and Technology (NIST) framework for protecting Personally Identifiable Information (PII).</p> <p>3.8 Leverage existing Department of Homeland Security (DHS), Department of War (DOW), and Department of Commerce (DOC) analyses on supply chain resilience in related sectors to help agencies understand AAM supply chain needs.</p>
4	Challenges	<ul style="list-style-type: none"> - Confusion exists regarding Federal and SLITT regulatory authority and governance structure - Lack of public engagement may inhibit
Community		
Planni		

ng and		communities from planning for smoother AAM-related transitions. Community members will require mechanisms to provide input on how localized AAM operations and facilities can best reflect local priorities
Engag		<ul style="list-style-type: none"> - there is not yet sufficient data to understand the privacy, noise, safety, land use, mobility, and environmental impacts of AAM - Currently, the Federal Government has not clarified how or if existing accessibility requirements would be applied to AAM aircraft and facilities
ement	Goals	<ul style="list-style-type: none"> - Help local officials and government leaders better understand the roles and responsibilities of each stakeholder in the delivery of AAM to their communities - Provide a repository of best practices and resources to assist local officials and government leaders to communicate with the public - Develop new resources to measure noise impacts of AAM - Promote accessibility in AAM aircraft and operations
	Recommendations	<p>4.1 Clearly communicate information and guidance on roles, responsibilities, and best practices for AAM planning to SLITT governments.</p> <p>4.2 Develop and publish community involvement resources regarding AAM operations.</p> <p>4.3 Research and develop tools to help communities, policymakers, and aircraft developers and operators evaluate noise impacts.</p> <p>4.4 Identify mission-critical AAM use cases supporting public safety, disaster response, medical transportation, and other needs and publish case studies.</p> <p>4.5 Promote accessibility for those with disabilities in the planning and design of AAM aircraft, vertiports, and other supporting infrastructure.</p>
5	Challenges	<ul style="list-style-type: none"> - Existing gaps in curricula supporting aviation currently rely on an informal
Workf		

orce		<p>network of volunteers, educators, and administrators. There is limited coordination, standardization, or strategized distribution of resources across required disciplines or work groups</p> <ul style="list-style-type: none"> - Cost and complexity for education systems to develop new curricula without clear connection to a return on investment for students - Promoting SLITT educational institutions' knowledge that AAM is maturing and will bring new employment opportunities
	Goals	<ul style="list-style-type: none"> - Expand the aviation workforce and the number of aviators, while managing introduction of new and automated technologies to improve safety and public welfare - Create new pathways to aviation careers - Incorporate aviation skills into technical education programs - Create opportunities for upskilling and retraining existing workforce
	Recommendations	<p>5.1 To support the potential growth of AAM, develop an interagency action plan to determine future workforce impacts, address future workforce needs, and provide training and workforce development resources.</p> <p>5.2 Update Standard Occupational Classification (SOC) codes to include occupational profiles for AAM-related careers.</p> <p>5.3 Promote AAM and aviation in existing and emerging workforce development programs and plans at both the K-12 and post-secondary levels and engage with existing White House-level organizations to ensure AAM is considered in national strategies that promote technical innovation, excellence, and workforce development initiatives.</p>
6 Auto matio n	Challenges	<ul style="list-style-type: none"> - Maintaining high levels of safety and security in technology and programming of automated aircraft - Determining how (or if) virtual testing can

		<p>be useful in development of automated aircraft</p> <ul style="list-style-type: none"> - Effectively coordinating multiple testing and evaluation efforts.
	Goals	<ul style="list-style-type: none"> - Enable automated AAM flight into the future airspace - Coordinate testing and evaluation methods to shrink development time and cost - Position the United States as the world leader in automated flight
	Recommendations	<p>6.1 Without deterring existing certification efforts, develop an aviation autonomy roadmap in consultation with the AAM industry.</p> <p>6.2 Assess the feasibility and cost-effectiveness of virtual testing to provide data needed to understand widescale use of increasingly autonomous aircraft and scaled operations.</p> <p>6.3 Research, develop, and implement processes to identify benefits as well as risks of automation technologies</p> <p>6.4 Maintain and coordinate government aircraft testing and evaluation efforts to accelerate safe AAM aircraft to market.</p>
7 Over archi ng Reco mme ndati ons	Recommendations	<p>7.1 Develop an ongoing and consistent interagency coordination effort that ensures completion of the recommendations of this Strategy.</p> <p>7.2 All agencies should plan to incorporate existing recommendations in this Strategy into their annual budget requests and spending plans beginning in Fiscal Year (FY) 2027.</p> <p>7.3 Congress should examine existing aviation funding methods and, if necessary, update them.</p> <p>7.4 Demonstrate global leadership in advanced aviation by removing regulatory barriers and adapting economic policies to secure investments, partnerships, and security assurances needed for a strong U.S. aviation industry.</p> <p>7.5 Proactively review regulations regarding small commercial aircraft manufacturing, operations, and infrastructure to find ways to open safe, performance-based regional, charter, and flexible service markets for AAM and other small</p>

	commercial air services.
	7.6 Leverage Public-Private Partnerships and other appropriate structures to facilitate and accelerate investments in, and sustained adoption of, AAM technologies.
	7.7 Enhance Federal Government research and development efforts, with a focus on pre-competitive work to advance technologies that will propel AAM (e.g., advanced batteries, airframe designs, and detect-and-avoid solutions).

3. Summary

This report provides an overview of the Advanced Air Mobility National Strategy 2025, which was published in December 2025.

To establish the United States as a global leader in AAM, the report indicates a commitment to advancing initiatives across a wide range of fields—going beyond aviation-specific measures to include collaboration with local communities and talent development that extends to reforms in primary and secondary education—while making the most of existing resources such as infrastructure and regulations.

Furthermore, given that automation is positioned as a key pillar of the strategy targeting 2036, it is clear that the plan is to pursue automation more explicitly. Japan’s “Advanced Air Mobility Roadmap”¹⁾, published in March 2026, also states that automated and autonomous operations will begin in the late 2030s. Given that both Japan and the United States are targeting roughly the same timeframe for AAM, and that technological development and discussions toward automation and autonomy are expected to proceed accordingly, we intend to continue closely monitoring these developments.

As mentioned earlier, DOT released the “Advanced Air Mobility Comprehensive Plan 2025”—an action plan—at the same time it announced its national strategy. This action plan clearly identifies the lead and relevant agencies for each recommendation, enabling smooth transitions for each agency to implement the actions outlined in the

recommendations. Since there are aspects of this plan that could serve as a useful reference for Japan as well, we intend to examine this action plan in greater depth in future articles.

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