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NEXAVIAN RESEARCH

Building Thailand's AAM Ecosystem

A practical pathway from demonstration to scalable operations.

2026 Edition

NexAvian’s position

Prove one complete operating use case before expanding

Thailand’s AAM challenge is to prove that the wider ecosystem can operate safely, repeatedly and with a credible path to commercial viability. NexAvian recommends proving one complete operating use case before expanding. This means validating the full system needed to deliver a defined service, with the aircraft, operator, supporting infrastructure and required approvals working together under real operating conditions. Success must demonstrate that the service can meet customer needs reliably and at a commercially sustainable cost, beyond demonstrating that the aircraft can fly. This means aligning market and ecosystem readiness with operational validation, then progressing to entry into service and commercial launch. NexAvian expects the approach to lower regulatory learning costs, reduce the risk of stranded infrastructure investment, and create a more credible path to routine operations. The Civil Aviation Authority of Thailand (CAAT) has a central role in coordinating the aviation interfaces, alongside industry and the other authorities responsible for delivery. If critical elements such as operating approvals or customer demand remain unresolved, aircraft readiness alone will not sustain a commercial service. A system-of-systems approach should therefore guide the next phase of implementation.

Findings

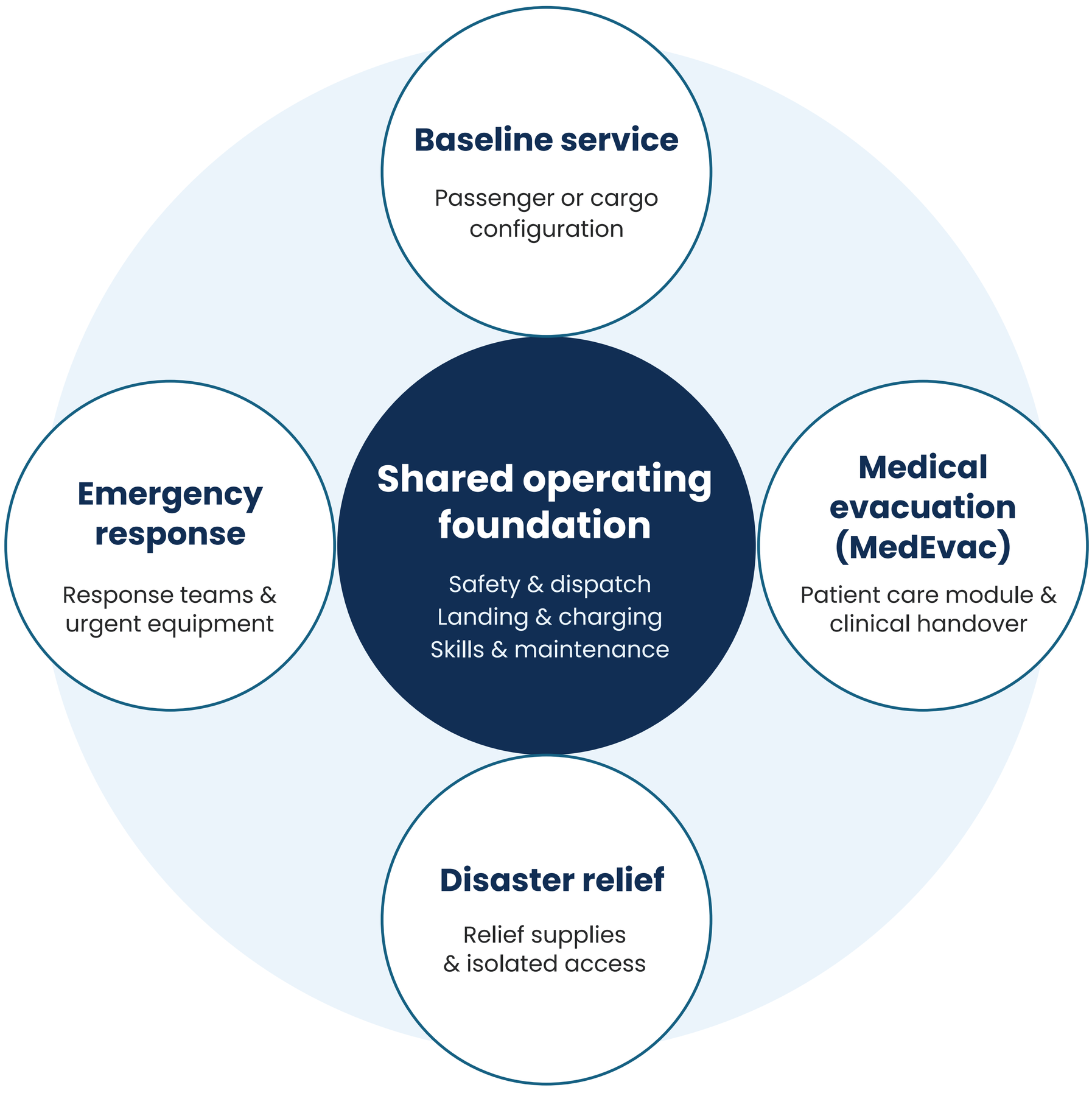
NexAvian sees early-market potential for Thailand in use cases beyond generic “flying taxis”. Premium tourism and inter-island connectivity offer potential missions where time savings or geographic friction may justify an air premium. A 2020 Southeast Asia demand study included Thailand; a 2025 ASEAN emergency-services study also implied the relevance of AAM to medical and emergency missions.[1] [2] NexAvian’s view is that an initial use case should be selected for a clear customer need and a credible operating model, then validated with prospective users.

Public legitimacy and talent must also be built before scale. A Bangkok research study linked expected practical benefits to stated willingness to use unmanned aircraft, and it was recommended that education and demonstrations be in place to build confidence.[3] Public education and early community engagement should therefore help people understand the proposed service and give them a voice in how it develops.

Private entities can also play their part. Public engagement programs such as NexAvian’s Thailand AAM Challenge 2035 can support public awareness, youth inclusion, and local relevance. Such initiatives complement the operational work by encouraging wider participation in the ecosystem.

A shared foundation for multiple AAM use cases.

NexAvian recommends building the foundations that allow flexible margins for the ease of implementing other AAM use cases. These range from suitable infrastructure to skills and operating processes.



Reusable foundation

Rather than building a foundational framework that is overly specific to one area of AAM, it should be built such that foresight for additional use cases can be more efficiently implemented.

Validation for each mission

Each added mission needs evidence of aircraft suitability, operating procedures, trained personnel and approvals before introduction.

NexAvian proposed framework, expanding the approved brief's reuse principle. Circles show possible connections only. They do not indicate market shares or universal aircraft capability.

Thailand’s momentum and the operating ecosystem

Research and implementation

Thailand’s AAM story is already more than an OEM sales narrative. In 2020, academic demand work examined Southeast Asian “flying car” potential and included Thailand interviews and helicopter-market considerations.[1] By 2025, peer-reviewed ASEAN work was examining AAM for emergency services across ASEAN-5, including Thailand.[2] Research published in 2025 using a June 2022 Bangkok survey examined behavioural determinants of unmanned-aircraft adoption, adding an explicit social-acceptance lens.[3] For NexAvian, this provides a useful basis for selecting and validating an initial operational use case.

The next step is to translate this evidence into a coordinated implementation program, with clear responsibilities and agreed measures of operational and commercial performance.

Success is system-wide

No OEM or operator controls the full chain required for commercial service. Recent AAM literature describes deployment as a system-wide challenge requiring coordinated development of aircraft, infrastructure, operations and stakeholder arrangements.[11] [12] [13] Market entrants should compete on aircraft performance, service quality and economics, whilst closely collaborating on the common operating foundations that no company can efficiently build alone.



Nick Fragassi, Co-Founder & COO of NexAvian at the MOVE Future Mobility Forum in Bangkok

The opportunity is to turn that learning into a repeatable service model. Progress should be judged by the reliability of the complete operation, not only by the performance of the aircraft.

International lessons for Thailand.

CHINA

EHang's EH216-S received type certification in October 2023 and production certification in April 2024. Its operators received operating certificates in March 2025.[18]

Takeaway: Develop the operating environment alongside aircraft approval, with authorities and local operators actively involved from the outset.

UNITED STATES

In the United States, Joby combined civil-certification work with operational learning through the US Air Force's Agility Prime program.[16]

Takeaway: Use a defined mission and operating environment to gather practical evidence that informs service preparation.

DUBAI

Dubai's AAM approach brings aviation and transport authorities together with aircraft providers and vertiport developers.[17]

Takeaway: Coordinate infrastructure and transport integration with the proposed service, while testing the commercial case.

An operating coalition

NexAvian believes that the system must be assembled effectively through collaboration and shared expertise before the market can be expected to function.

Operators should, therefore, arrive with an operating coalition and a demonstrable public-value case. For example, an offshore support proof-of-concept could bring oil and gas companies together with helicopter operators around a defined customer need. Emergency medical services, logistics and tourism offer other use cases to assess on their own requirements. Where practical, shared infrastructure and skills can support wider public value, with each additional mission validated before introduction.

Proving one use case before replication

01

Market and ecosystem readiness

02

Operational design and validation

03

Entry into service and commercial launch

A practical path to scale is to prove one complete operating system around a defined use case before expanding more broadly. A corridor may support that use case, but the starting point should be the mission and customer need. The first milestone is whether the operation can deliver safely, repeatedly, and with a credible path to commercial viability.

That first use case should bring the essential pieces together in one place. The aircraft and operator must work within a defined regulatory pathway, while the route, infrastructure and emergency procedures are tested under real operating conditions. This allows both government and industry to learn from one complete system rather than from separate demonstrations that do not yet connect.

The value of the first use case lies in what can be reused. Approval processes, operating procedures and infrastructure requirements can become a reference model for future deployments.

NexAvian recommends using corridor pilots to develop operating concepts and infrastructure experience before wider network expansion. The objective is to make the next deployment easier than the first.

Once the initial operation has built sufficient operating history, the same model can be adapted to another region or use case. Local factors such as weather or demand may change, so each deployment still needs its own validation.

NexAvian recommends that the initial coalition agree on who owns delivery and what evidence is needed to progress. Safety performance, service reliability and customer demand should inform the decision to move towards commercial launch and subsequent replication. Build small enough to learn quickly, but complete enough to prove the system.

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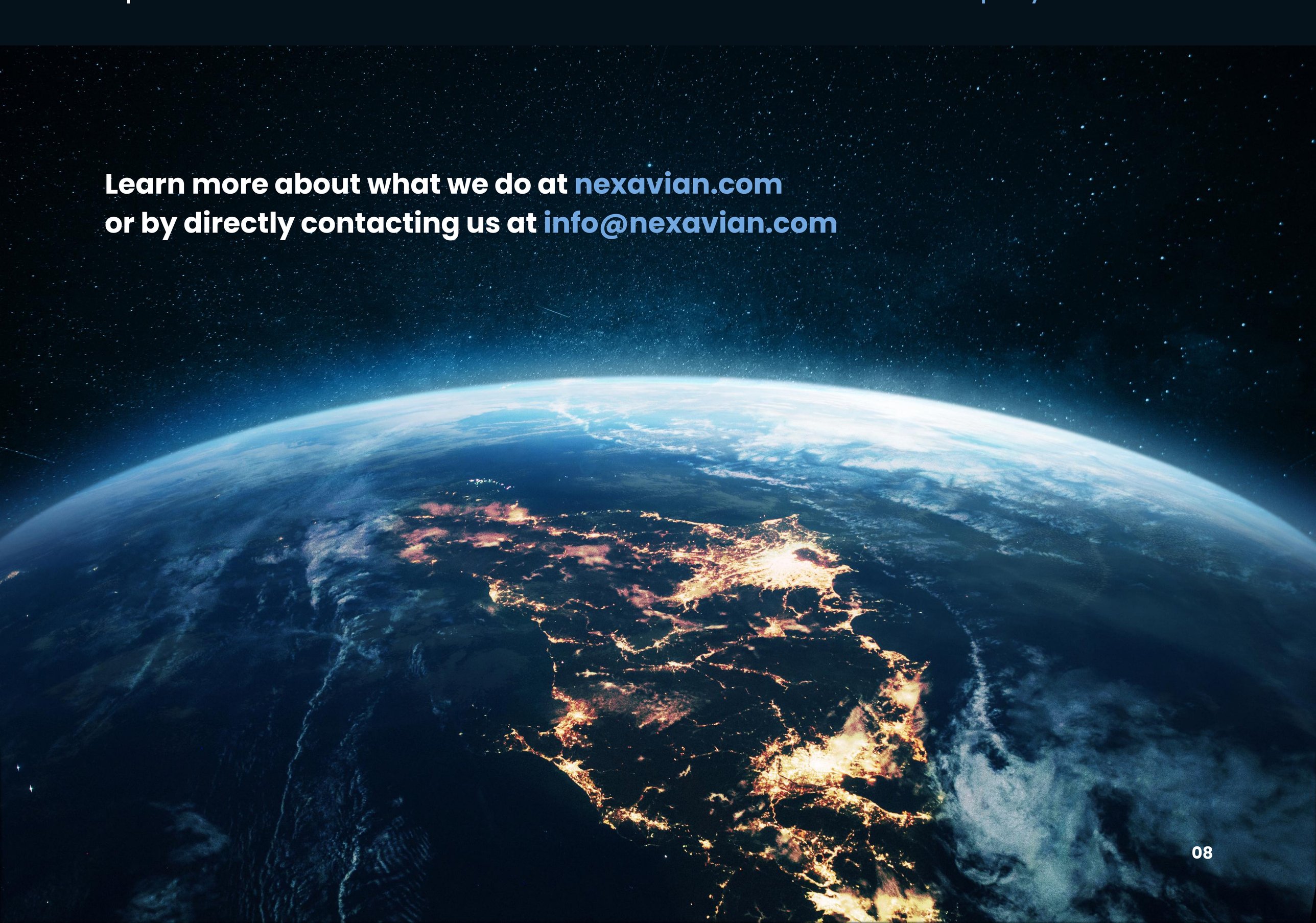
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