

## MEETING RECORD

### Kick-off meeting - Research study on High-Altitude Pseudo-Satellites

24 November 2022

11:00-12:30

Microsoft Teams

Chairperson:	Deloitte
Note taker:	Deloitte
Attendees:	Frontex, DG JRC, Europol, FRA, EUSPA, EU SatCen, Deloitte, Stratosyst

#### Agenda

1. Welcome
2. Roundtable
3. Introduction, context and objectives recap
4. Project approach and planning
5. Project management practicalities
6. Next steps
7. Q&A

## 1. Welcome

#### Discussion

- Frontex colleagues opened the meeting, iterating the mission and expectations, and highlighting that the study is conducted under the umbrella of the EU Innovation Hub.
- Deloitte welcomed everybody and introduced the meeting, encouraging collaboration throughout the project.

#### Conclusions

n/a

#### Actions items

n/a

## 2. Roundtable

### Discussion

- Deloitte initiated the roundtable, giving the opportunity for everybody to introduce itself.

### Conclusions

n/a

### Actions items

n/a

## 3. Introduction, context and objectives

### Discussion

- Deloitte presented the purpose of the Kick-off Meeting (KoM): discussing and aligning on the approach and methodology utilised throughout the project and clarifying the key milestones and planning leading up to project delivery. Moreover, any project management practicalities will be discussed as well.
- The overall objective of the study is to provide an analysis of the High-Altitude Pseudo-Satellites (HAPS) market, including an assessment of their use as capability enablers, in the context of the EU's initiatives to strengthen its innovation capability and ensuring its global competitiveness (e.g. with Horizon 2020, Horizon Europe, EU Innovation Hub for Internal Security).
- The scope of the study is global, in order to adhere to the requirements of the market research and benchmark analysis.

### Conclusions

n/a

### Actions items

n/a

## 4. Project, approach & planning

### General overview

### Discussion

- Deloitte presented the overall study approach and the high-level overview of the different 6 work packages (Work Packages 0-6).
- Deloitte presented an outline of the specific methodology for Work Package 1-3, including the following elements per Work Package:
  - o WP1 will focus on the HAPS market analysis, based on the following elements:
    - A research matrix guiding the assessment on the current market, legal framework, and foreseen evolution;
    - A market research to capture the market size and growth forecasts, applications and key projects/initiatives, trends and challenges, and stakeholders;

- A SWOT analysis to compare HAPS against its main competing technologies.
- WP2 will focus on the technology assessment on HAPS, taking into account:
  - The identification of use cases for HAPS by Frontex and the project stakeholders;
  - A categorisation based on Altitude (how high?); Data (how good?) and Operation (how fast and long?).
- WP3 will focus on the fundamental rights assessment, which will be prepared following the Better Regulation Toolbox, in particular Tool #29. The following questions will be backbone of the assessment:
  - What fundamental rights are affected?
  - Are the rights in question absolute rights?
  - What is the impact of the use cases under consideration on fundamental rights?
- In regard to the identification of use cases under WP2, Frontex indicated that the needs of project stakeholders will be taken into account by the study team.
- When establishing the market overview, participants stressed to take into account the wider security context and developments, next to the HAPS market assessment and foreseen evolutions itself.
- Participants pointed out that all layers in regard to the assessment of the legal framework. It will be important to assess fundamental rights in the context of use cases, also to look into the interference of fundamental rights rather than approaching it from an absolute rights angle (referring to the second question in the checklist from Tool #29).
- In regard to the WP1 and the SWOT analysis, participants indicated to take into account the different functionalities, applications and use cases of HAPS and its competing technologies. Moreover, besides the benchmarking between HAPS and its competing technologies, it is important to also do the SWOT analysis on HAPS as a technology itself.

### Conclusions

- The study team will reach out to Frontex and the project stakeholders in regard to the identification of use cases for HAPS.
- The study team took note of the comments in regard to the SWOT analysis under WP1 and the fundamental rights analysis under WP3, and will take these into account when carrying out the assessment.

### Actions items

- The study team will take the aforementioned conclusions remarks and points of attention into account and fine-tune the existing methodology and Management Plan accordingly.
- Frontex will support the study team with the identification of relevant stakeholders in the context of the study.
- The study team will align with Frontex and the project stakeholders on several aspects of the study, including the identification of the use cases and the fundamental rights assessment.

## Work Package 1 - Overview of the HAPS market

### Discussion

- Stratosyst presented the key activities under WP1, including:
  1. Review of the SOTA, overview of the legal framework and foreseen evolution of the market;

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2. Simplified market research on HAPS;
  3. Benchmark report on competing technologies survey; and
  4. The final deliverable of WP1, being WP1 HAPS Market Report, to be shared in Word.
- After the presentation of the key activities, there was no additional discussion as the points were raised during the general overview.

### Conclusions

n/a

### Actions items

n/a

## Work Package 2 - Specific assessment on HAPS

### Discussion

- Stratosyst presented the key activities under WP2, including:
  1. Technology assessment on HAPS;
  2. Identification of potential security research topics to be addressed in future EU research and innovation activities;
  3. The final deliverable of WP2, being the HAPS Technology assessment Report, to be shared in Word.
- Frontex welcomed the exclusion of the cellular/broadband perspective from the project's scope.

Participants and Frontex discussed the mapping of the use cases and the role of the project stakeholders in this regard.

- Participants indicated the potential inclusion of an assessment of the operating model of all identified use cases, including the cost model.

### Conclusions

- The study team will provide an initial mapping of the use cases and competing technologies, and will align on the final list with Frontex and the project stakeholders to ensure the highest possible relevancy of the study.

### Actions items

n/a

## Work Package 3 - Fundamental rights impact assessment

### Discussion

- Deloitte presented the key activity under WP3, entailing the fundamental rights impact assessment based on the Fundamental rights checklist from the Better Regulations Guidelines.
- Participants welcomed the focus on fundamental rights across the work packages, and its important place in the project.

### Conclusions

n/a

**Actions items**

- The study team will get in touch with relevant stakeholders - including, but also beyond Frontex (e.g. FRA) - in regard to the fundamental rights aspects regarding HAPS.

## Work Package 4 - Data sharing and dissemination

**Discussion**

- Deloitte presented the activities and deliverables under WP4:
  1. Four insights to be published on the Frontex website and intranet;
  2. A webinar presenting the results of the research study;
  3. A high-quality visual package summarising the results of the study.
- Participants and Frontex discussed the format of the webinar, in particular the attendance of stakeholders to the webinar.

**Conclusions**

- Frontex stated that the webinar - as it stands now - will be conducted, recorded and shared online. Frontex will reflect on the stakeholders to be invited to the webinar.

**Actions items**

n/a

## WP5 - Analysis and final reporting

**Discussion**

- Deloitte presented the outline of the final analysis and reporting activities at the end of the project, including:
  1. Draft Final Study Report;
  2. Final version of the Final study report, after a two-week review cycle by Frontex;
  3. A booklet summarising the results of the study;
  4. A Strategic presentation on Final Study Report in PPT.
- Deloitte raised the potential challenge regarding the delivery of the final deliverables, as they are due in the holiday period.

**Conclusions**

n/a

**Actions items**

n/a

## Planning

### Discussion

- Deloitte presented the overall timeline of the study, as well as the deadlines for the key deliverables.
- The holistic overview of the planning including the key milestones can be found in the presentation of the KoM.

### Conclusions

n/a

### Actions items

n/a

## 5. Project management practicalities

### Discussion

- Deloitte presented the foreseen project management practicalities and way of working for the project, including a bi-weekly progress meeting between the study team and Frontex, as well as content calls with specific project stakeholders to be scheduled on a need basis.

### Conclusions

n/a

### Actions items

n/a

## 6. Next steps

### Discussion

- Deloitte presented the next steps for the project:
  1. Sharing of relevant documents (by Frontex and project stakeholders);
  2. Review and analyse of documentation received (Deloitte);
  3. Sharing the meeting minutes of the KoM (Deloitte);
  4. Share stakeholder matrix for data collection activities (Deloitte);
  5. Set-up recurring progress calls for bi-weekly status meetings (Deloitte).

### Conclusions

- Frontex will share the slides of the KoM on its website, as well as the minutes of the meeting at hand and the first insight.

### Actions items

- The study team has to prepare the updated presentation, minutes and insight by the end of next week (2/12/2022).

## 7. Q&A

### Discussion

- There were no further elements for discussion.

### Conclusions

n/a

### Actions items

n/a