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SEVENTH WORLDWIDE AIR TRANSPORT CONFERENCE (ATCONF/7)

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Agenda Item 4: Emerging technologies, new business models and other associated aspects
4.2 Support and economic opportunities of access to aviation cleaner energies

DRAFT REPORT

(6 pages)

Agenda sub-item 4.2: Support and economic opportunities of access to aviation cleaner energies

4.2.1 DOCUMENTATION

4.2.1.1 WP/91, presented by Brazil and supported by 20 LACAC Member States[1], highlighted the economic and investment opportunities of aviation cleaner energies, particularly for developing countries and States with special needs. Drawing on Brazil's Sustainable Aviation Fuels (SAF) production potential, it called for a global SAF market under harmonized International Civil Aviation Organization (ICAO) and Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) criteria. It recognized the need for government support during market formation, while cautioning against measures that could fragment demand and distort investment flows. The paper invited the Conference to encourage investment in SAF production and link it to demand by aeroplane operators, urge States to avoid discriminatory market measures, and request ICAO to mobilize financing with partners and accelerate approval of eligible feedstocks and pathways.

4.2.1.2 WP/138, presented by Ireland on behalf of the European Union (EU) and its Member States[2], the other Member States of the European Civil Aviation Conference (ECAC)[3], and by EUROCONTROL, highlighted the ICAO Global Framework as an opportunity for States to develop their economies and strengthen their energy sovereignty. It outlined several ICAO and European initiatives supporting aviation cleaner energies, including Assistance, Capacity-building, and Training on Sustainable Aviation Fuels (ACT-SAF) and the Finvest Hub, and emphasized regulatory predictability and access to financing. The paper invited the Conference to encourage greater financial support for these initiatives, call upon ICAO to expand the environmental provisions in the Template Air Services Agreement (TASA), and encourage States to strengthen corresponding provisions in their bilateral agreements. It also called for cooperation in preparing the Fourth ICAO Conference on Aviation and Alternative Fuels (CAAF/4), with a view to adopting further milestones towards net-zero CO_2 emissions by 2050.

4.2.1.3 WP/94, presented by Italy, highlighted the need to incorporate climate-risk assessments into airport Master Plans and infrastructure investment decisions. Drawing on Italian airport experience, it proposed two complementary indicators to measure (a) overall airport resilience and (b) the contribution of individual projects, aiming to support investment prioritization while preserving flexibility for local conditions. The paper invited the Conference to recognize climate resilience as a measurable planning objective, encourage States and airport planners to adopt risk- and performance-based approaches, and request ICAO to consider scalable methodologies and indicators, building on existing climate-risk guidance.

4.2.1.4 WP/171, presented by Peru and supported by 18 LACAC Member States[4], drew on Peru's experience under ACT-SAF to highlight the need for continued support beyond feasibility studies, including business implementation studies, business cases, investment roadmaps and, where necessary, matchmaking mechanisms linking projects with investment opportunities and resource mobilization. The paper invited the Conference to encourage ICAO to strengthen such support for developing States and, in

[1] Argentina, Belize, Bolivia (Plurinational State of), Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Venezuela (Bolivarian Republic of).

[2] Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden.

[3] Albania, Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Iceland, Monaco, Montenegro, North Macedonia, Norway, Republic of Moldova, San Marino, Serbia, Switzerland, Türkiye, Ukraine and United Kingdom.

[4] Belize, Bolivia (Plurinational State of), Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Uruguay.

coordination with regional civil aviation commissions, explore a regional SAF information platform to identify synergies, target technical assistance and strengthen cooperation.

4.2.1.5 WP/86, presented by Saudi Arabia and the United Arab Emirates, and co-sponsored by Egypt, highlighted a gap between regional SAF mandates imposed on fuel suppliers and the recognition of claims of associated emissions reductions under CORSIA. It argued that air transport operators bear the cost of mandated SAF without being able to claim the reductions against their CORSIA offsetting requirements, creating an additional financial burden, particularly for operators from developing States. The paper invited the Conference to request the Council, with the Committee on Aviation Environmental Protection's (CAEP) technical support, to prioritize a recognition mechanism consistent with CORSIA requirements and safeguards against double counting, and to urge States implementing SAF mandates to align their tracking systems with the global scheme.

4.2.1.6 WP/137, presented by the Air Transport Action Group (ATAG), Airports Council International (ACI), International Business Aviation Council (IBAC), Aviation Services Association (ASA World) and International Coordinating Council for Aerospace Industries Associations (ICCAIA), highlighted aviation's energy transition as an opportunity to attract investment, create jobs and support economic growth, while strengthening energy security and resilience. It emphasized the role of public finance in attracting private investment and highlighted the ICAO Finvest Hub as a mechanism to support financing coordination and SAF project development. The paper invited the Conference to encourage States to deploy cleaner energy policies within the next five years and integrate aviation energy diversification into national economic policies and investment planning. It also called for targeted finance and policy measures extending beyond jet fuel replacement to support a shift towards renewables in the ground energy mix.

4.2.1.7 WP/30, presented by the International Air Transport Association (IATA), emphasized the instrumental role of government policy in creating and developing markets for SAF, Lower Carbon Aviation Fuels (LCAF) and other aviation cleaner energies, including upstream supply chains. It called for coordinated action across sectors and well-sequenced policies to mobilize investment, build production capacity and infrastructure, and subsequently enable demand, cautioning that premature mandates could increase costs and distort markets. The paper invited the Conference to encourage harmonized enabling policies and continued ICAO cooperation with industry on coordinated policy frameworks and a global SAF market, including harmonized sustainability and certification requirements and exploration of purchase-based accounting for CORSIA Eligible Fuels.

4.2.1.8 WP/101, presented by ICCAIA, ACI, ASA World, ATAG, Civil Air Navigation Services Organisation (CANSO), IATA and IBAC, highlighted the growing operational and economic impacts of climate change across the aviation system and the need for adaptation to safeguard air connectivity and the socio-economic benefits of air transport. It emphasized integrating climate resilience into planning and investment decisions, with particular attention to developing States' financing and capacity needs. The paper invited the Conference to recognize the urgency of adaptation, encourage States to incorporate aviation resilience into risk management, infrastructure and investment frameworks, and request ICAO to convene a dedicated high-level event following the 44th Session of the Assembly.

4.2.2 **DISCUSSION**

4.2.2.1 There was general recognition that the transition to aviation cleaner energies could attract investment, create employment and strengthen energy security. It was noted that developing States could benefit from domestic production and participating in global supply chains. The discussion also recognized opportunities beyond fuel replacement, including greater use of renewable energy in ground operations.

The importance of a just transition was also highlighted, including training and skills development for aviation workers.

4.2.2.2 The Conference recognized the substantial technical work already underway in relevant ICAO bodies and supported its continuation, including on the assessment of eligible feedstocks and production pathways, and on the harmonization for the recognition and accounting of emissions reductions from aviation cleaner energies, while emphasizing that efforts to expedite environmental certification should not compromise fuel qualification processes. The Conference also recognized the ICAO Global Framework for SAF, LCAF and other Aviation Cleaner Energies as the basis for coordinated action on policy and planning, regulatory framework, implementation support and financing, including CORSIA as the accepted basis for the eligibility of SAF, LCAF and other aviation cleaner energies used in international aviation. Support was expressed for continued cooperation in preparing for CAAF/4.

4.2.2.3 The discussion highlighted the role of government policy in shaping markets for aviation cleaner energies. Policy support was considered important during market formation, with measures sequenced to develop feedstock supply, production capacity and infrastructure, and link investment in production to demand from aircraft operators.

4.2.2.4 The discussion highlighted concern regarding the interaction between CORSIA and regional measures as fragmented approaches may duplicate requirements, increase costs and distort competition. It emphasized the need for further ICAO technical work on a harmonized system for the recognition and accounting of emissions reductions from aviation cleaner energies.

4.2.2.5 Support was expressed for strengthening the ICAO ACT-SAF and Finvest Hub programmes and extending support beyond feasibility studies, including business implementation studies, project acceleration, and matchmaking projects with investment opportunities and resource mobilization. The Conference also considered the value of regional information-sharing to identify common needs and better target technical assistance, while noting the need to consider associated resource implications.

4.2.2.6 The Conference considered the proposal for ICAO to continue the review of the Template Air Services Agreement with the aim to strengthen the environmental provisions therein, concerns were however expressed on introducing environmental and decarbonization provisions into bilateral Air Services Agreements, in light of the collective and aspirational nature of the LTAG which does not attribute specific obligations to individual States.

4.2.2.7 The Conference recognized the value of considering climate adaptation and resilience aspects as part of national climate policies and planning processes to maintain the continuity of air services and airport infrastructure. Support was expressed for ICAO to continue to maintain and enhance guidance on climate change risk assessment and adaptation measures for international aviation. The Conference noted the proposal for a dedicated high-level event on the adaptation topic following the 44th Session of the Assembly, while noting that topic could also be incorporated into existing ICAO environmental fora.

4.2.2.8 The Conference noted Information Papers WP/49, presented by China, and WP/67, presented by IATA.

4.2.3 **CONCLUSION**

4.2.3.1 As a result of the documentation and working papers considered and ensuing discussion under Agenda Item 4.2, the Conference concluded that:

a) the transition to aviation cleaner energies offers opportunities to attract investment, create employment and strengthen energy security, including in developing States;

b) appropriately sequenced government policies can support market development by linking investment in supply to demand for aviation cleaner energies, while minimizing market fragmentation and distortions to competition;

c) further ICAO technical work should continue on a harmonized system for the recognition and accounting of emissions reductions from aviation cleaner energies, as fragmented approaches may duplicate requirements, increase costs and distort competition; and

d) climate resilience is important for the continuity of air services, airport and air navigation infrastructure, while safeguarding the socio-economic benefits of air transport, and should be considered as part of national climate policies and planning processes.

4.2.4 RECOMMENDATIONS

Recommendation 4/2 — Support and economic opportunities of access to aviation cleaner energies

The Conference recommends that:

a) States should consider the economic benefits of aviation cleaner energies and, in light of national circumstances, consider the use of incentives and other policies to encourage the scale-up in the production and deployment of aviation cleaner energies;

b) ICAO should continue implementing the Global Framework for SAF, LCAF and other Aviation Cleaner Energies, including further technical work on a harmonized system for the recognition and accounting of emissions reductions from aviation cleaner energies, with the understanding that CORSIA is the accepted basis for the eligibility of SAF, LCAF and other aviation cleaner energies used in international aviation;

c) ICAO should further strengthen the ACT-SAF and Finvest Hub programmes, including business implementation studies, project acceleration, and matchmaking projects with investment opportunities and resource mobilization for aviation decarbonization measures, as well as consideration of regional information-sharing to identify common needs and better target technical assistance, with due consideration of resource implications; and

d) ICAO should continue to maintain and enhance guidance on climate change risk assessment and adaptation measures for international aviation, and States should consider undertaking climate risk assessments to foster the inclusion of climate change adaptation measures into national climate policies and planning processes, as appropriate.

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