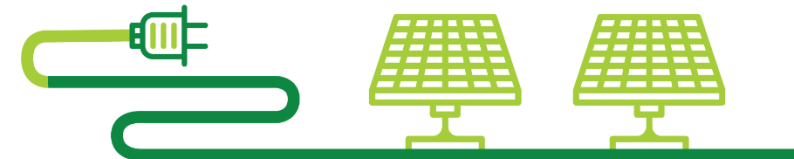


# AVIATION CO<sub>2</sub> REDUCTIONS



## STOCKTAKING SEMINAR

TECHNOLOGY · OPERATIONS · SUSTAINABLE AVIATION FUELS



# Enabling a green aviation transition



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# World Economic Forum's *Clean Skies for Tomorrow* ambition

## Ground work to create a fact base

## Enablers for scale-up



### 1: Assess SAF feasibility and sustainability

Refine and strengthen existing analyses on feedstock availability, technology readiness and production cost into a concise synthesis



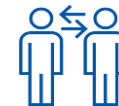
### 2: Democratize global SAF supply

Design a specific, comprehensive and actionable approach to scaling-up SAF in India and produce a blueprint for other regional pilots



### 3: Align on an industry-backed policy proposal

Align on proposed policy interventions to trigger learning curve effects and economies of scale that could benefit the rest of the industry



### 4: Create a scalable SAF market place

Design a SAF market-place and make a wave of first transactions, design and pilots in 2020, 1st wave of transactions in 2021



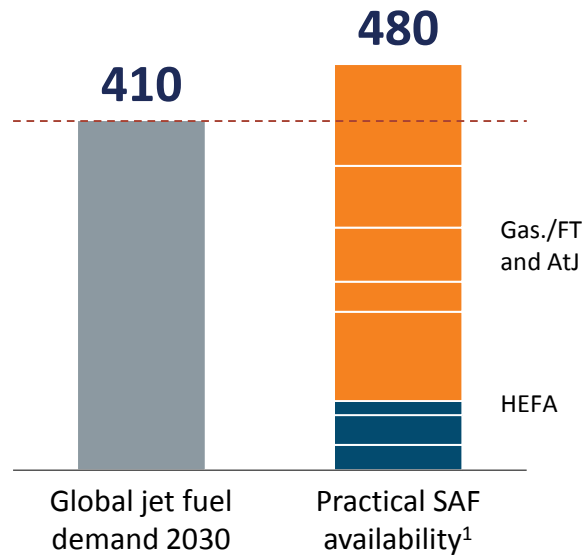
### 5: Develop a blueprint for financing

Develop a blueprint for the financing of the transition to SAF, based on dialogues between aviation players and the finance community



# There is enough feedstock to scale SAF and costs will decrease

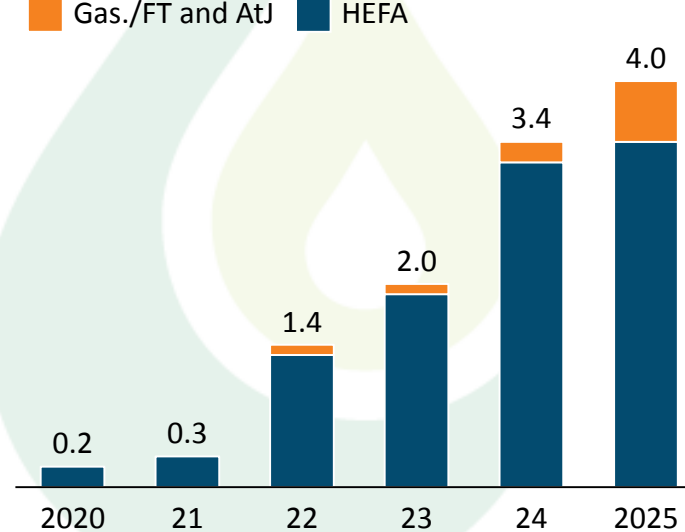
There is enough feedstock to power aviation in 2030, million tons



HEFA fuel can only supply a share of global jet fuel demand

Feedstock availability considers sustainability criteria but not competing demand

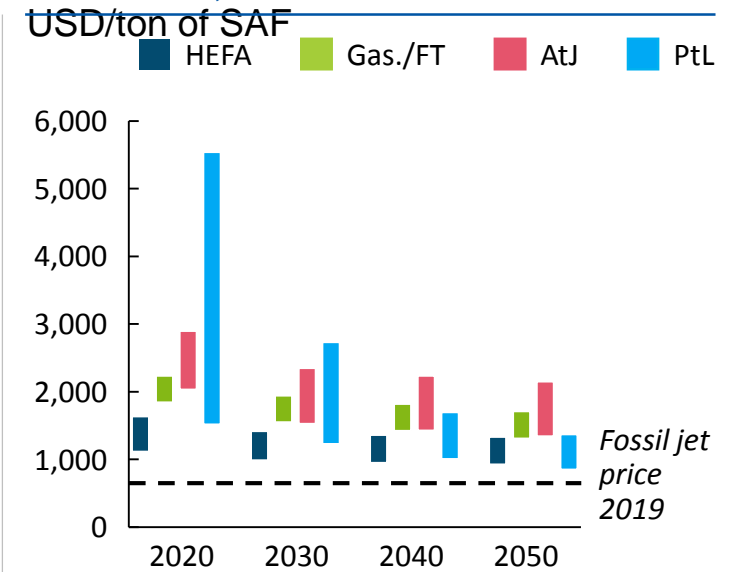
Production capacity reaches approx. 1% of global jet fuel demand by 2025, million tons



Slow capacity increase according to public announcements

Scale-up driven by HEFA SAF producers and smaller companies

Production costs of SAF will reduce but remain above the fossil alternative, USD/ton of SAF



SAF costs will decrease with scale, learning rate effects and lower cost of green electricity

There is no "silver bullet": different regions will transition to new technologies at different pace

1. Not considering power-to-liquid / e-fuels






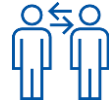
## Status of the Forum's *Clean Skies for Tomorrow* work on SAF enablers



### Policy




Ongoing conversations in Europe to align on **coherent policies** combining **demand side incentives** and **supply side de-risking**

- Sep  Publish joint policy proposal (EU)
- Oct  Publish joint view of feasible ramp
- Dec  Consult with European Commission



### Demand side



Building a market place and an operating system that **allows corporate customers to decarbonize through SAF** and receive credits

- Oct  Design "unit of trade" and accounting framework
- Nov  Draft demand use cases and consult with NGOs
- Jan 2021  Launch SAF credit pilot (early 2021)



### Financing

Exploring options with banks and public finance institutions to **support SAF investment** and **de-risk business models**

- Oct  Convene coalition of finance players
- Nov  Review business models & key financing challenges
- Dec  Identify scalable solutions for project finance

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# Thank You



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Montréal

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North Atlantic  
(EUR/NAT) Office  
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(APAC) Sub-office  
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