

Supporting  
European  
Aviation



# Towards greener and more resilient ATM

## Europe for Aviation Stand, World ATM Congress 2022

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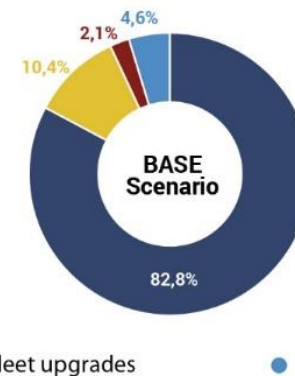
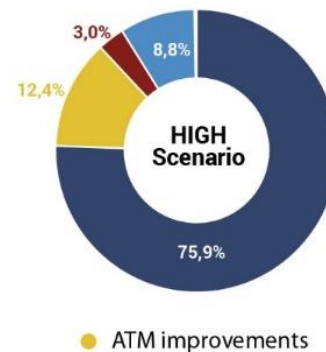
Madrid, 21 June 2022



# INDUSTRY-DRIVEN RESPONSES

## 2030 CO<sub>2</sub> EMISSIONS SAVINGS & CONTRIBUTION TO 55% REDUCTION TARGET

	High	Base	Low
Savings from ATM improvements	25.5 MtCO <sub>2</sub> / 12.4%	18.3 MtCO <sub>2</sub> / 10.4%	13.0 MtCO <sub>2</sub> / 8.3%
Savings from fleet upgrade	6.1 MtCO <sub>2</sub> / 3%	3.8 MtCO <sub>2</sub> / 2.1%	1.9 MtCO <sub>2</sub> / 1.2%
Savings from SAF	18.0 MtCO <sub>2</sub> / 8.8%	8.1 MtCO <sub>2</sub> / 4.6%	6.1 MtCO <sub>2</sub> / 3.9%
Emission Reduction Potential	49.6 MtCO <sub>2</sub> saving / 24.1%	30.2 MtCO <sub>2</sub> saving / 17.2%	21.0 MtCO <sub>2</sub> saving / 13.4%



● ATM improvements

● Fleet upgrades

● SAF

● MBM (ETS + CORSIA)

# OVERALL DECARBONISATION DIFFERENTIAL COSTS



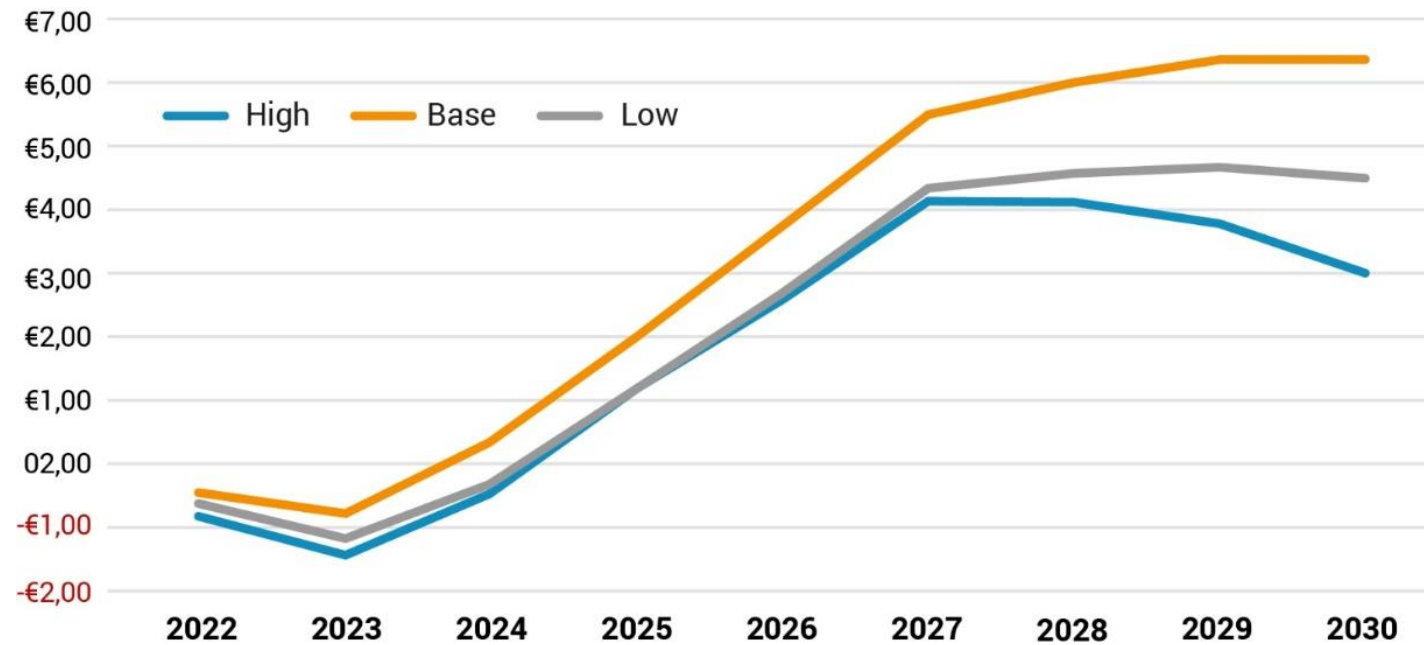
Cumulative costs over 2022-2030 (€ billion)	High (with 10% SAF uptake in 2030)		Base (with 5% SAF uptake in 2030)		Low (with 4% SAF uptake in 2030)	
	Before industry measures	After industry measures	Before industry measures	After industry measures	Before industry measures	After industry measures
Extra fuel mix costs (SAF/kerosene)	€12.1	€-18.5	€10.0	€-11.4	€4.3	€-22.4
Extra ETS costs	€19.6	€8.7	€23.2	€14.9	€24.1	€18.3
Reduced CORSIA costs	€-0.6	€-1.4	€-0.3	€-0.8	€-0.2	€-0.6
Extra taxation costs	€30.9	€27.4	€28.8	€26.2	€26.6	€24.7
<b>TOTAL cumulative costs</b>	<b>€62.0</b>	<b>€16.4</b>	<b>€61.8</b>	<b>€28.9</b>	<b>€54.8</b>	<b>€20.0</b>

## COST SAVINGS FROM INDUSTRY-DRIVEN MEASURES 2022-2030

Cost savings from industry-driven measures 2022-2030 (€ billion)	High (with 10% SAF uptake in 2030)	Base (with 5% SAF uptake in 2030)	Low (with 4% SAF uptake in 2030)
Fuel cost mix savings (SAF/kerosene)	€-30.6	€-21.4	€-26.7
ETS cost savings	€-10.9	€-8.3	€-5.9
CORSIA cost savings	€-0.7	€-0.5	€-0.4
Taxation cost savings	€-3.5	€-2.6	€-1.9
<b>Cumulative cost savings</b>	<b>€-45.7</b>	<b>€-32.9</b>	<b>€-34.8</b>

# The preferred trajectory to -55%

- The **“High”** scenario, boosted by a higher level of revenues, is the preferred trajectory to -55% in 2030 offering the **most promising decarbonisation capability** by 2050 at **lower costs**.
- The **“Base”** scenario demonstrates that **without financial support** and extra incentives, the costs of the **decarbonisation** measures **can slow down** the potential of the aviation industry to decarbonise.
- The **“Low”** scenario, **affecting negatively the revenues, profitability and investment capabilities** of the airspace users, presents the highest reliance on market-based measures obliging airlines to severely **rely on carbon trading and offsetting measures**. It exposes the weakest resilience in any future economic downturn and energy crisis.



# SUPPORTING EUROPEAN AVIATION

