

The Austrian SAF Roadmap

Development of a Roadmap for the introduction of sustainable aviation fuels in Austria

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The Austrian SAF Roadmap - Overview

- **Development process**

- Strategic framework
- Expertise and Timeline
- Stakeholder involvement

- **Content of the Roadmap**

- Structure
- Key Messages
- Policy recommendations and measures

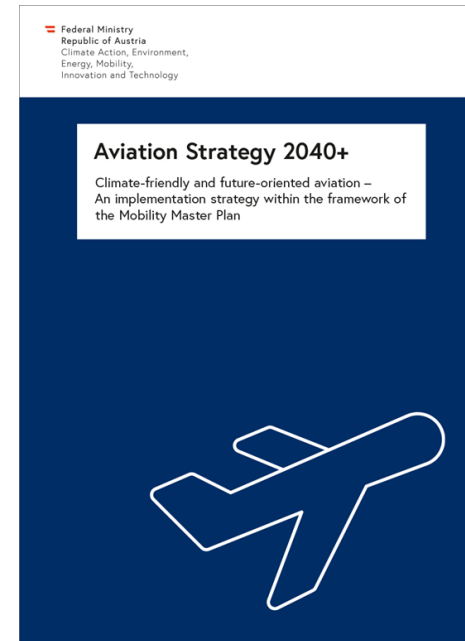
- **Next steps and lessons learned**



Strategic framework

Austrian Aviation Strategy 2040+ with 4 key areas

Sustainability,
environmental and
climate protection



➔ Development of national SAF Roadmap as key measure towards decarbonisation

Air transport in the
overall transport system

Competitiveness of the
aviation location

Digitalization and
technological change

Expertise and Time Frame

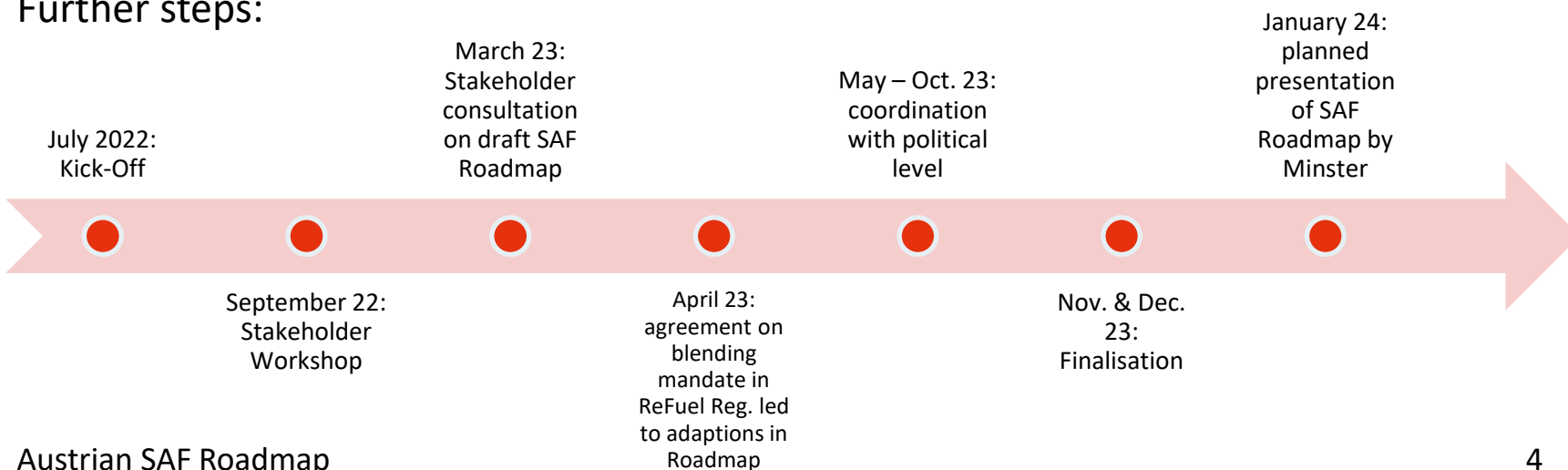
June 2022: Contract on elaboration of SAF Roadmap between

 Federal Ministry
Republic of Austria
Climate Action, Environment,
Energy, Mobility,
Innovation and Technology

and

umweltbundesamt^U
ENVIRONMENT AGENCY AUSTRIA

Further steps:



Stakeholder involvement

- Close cooperation with stakeholders via
 - Workshop
 - Working Group on Environment (within framework of Aviation Strategy)

- Environment Agency and stakeholder representative group „ZÖVI“ elaborated a common scenario for the SAF demand in Austria



- Involved partners:

Within Ministry, social partners, companies (airlines, airports, fuel and energy providers etc.), NGOs

Goals of the Austrian SAF Roadmap

The aim of the SAF Roadmap is:

- To ensure compliance with the requirements of the ReFuel EU Aviation Regulation
- To secure availability of SAF in Austria / for Austrian industry
- To ensure a successful market ramp-up in Austria



Structure of SAF Roadmap

Five Chapters:



Regulatory and strategic framework



Technology paths and sustainability



SAF demand in Austria



Economic potential in Austria



Strategic focus and measures

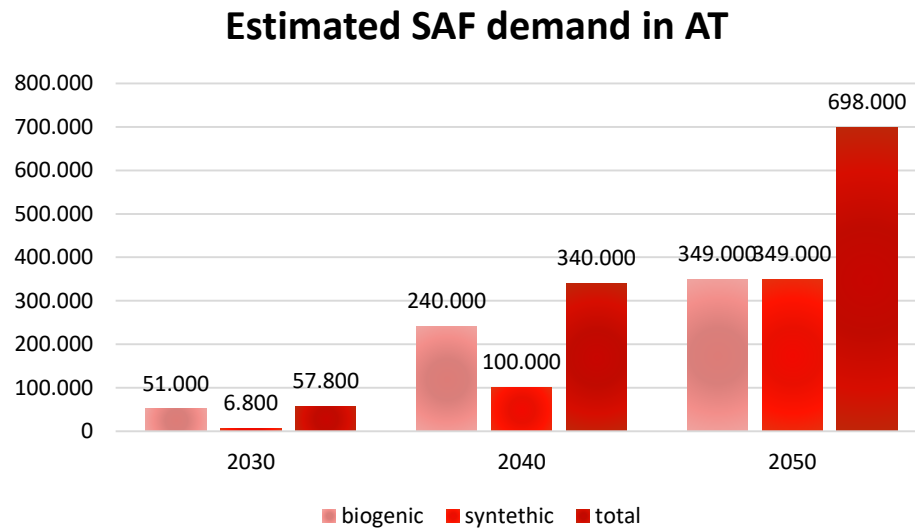
Key messages: SAF Demand

- Estimated SAF demand in Austria until 2050 based on
 - the estimated traffic development according to Eurocontrol forecasts (low, base and high scenario, additional national “ZOVI” scenario)
 - the estimated consumption of kerosene
 - the respective blending mandate according ReFuel EU Aviation Regulation

Conclusion: The **future demand for SAF in Austria is enormous**. This need requires large quantities of raw materials (biomass and energy), as well as a rapid ramp-up of SAF production in Austria, Europe and the rest of the world.

Key messages: SAF Demand

Estimated SAF demand in Austria in tons per year according to ReFuel EU quota:



Key messages: Economic potential in Austria

- The amount of SAF that can be produced depends on the availability of raw materials and the availability/capacities of production facilities
- The need for **raw materials** is not met in terms of both biomass and “green” hydrogen due to high competition with other sectors.
 - This may require measures to control the available raw material flows or to prioritize the use of raw materials in sectors that are hard to abate, such as aviation.
- The **production capacities** are limited, which is why imports will play a crucial role in securing the availability of SAF.
 - Continuous monitoring of the development of European production capacities in particular and the development of an import strategy is recommended.

SAF Roadmap: Policy recommendations and measures

Five focus areas with 17 detailed measures:



Next steps and lessons learned

- **Next steps:**
 - Publication is planned in January 2024
 - Implementation already started with focus on analysing possibilities for government support for SAF production and use
- **Lessons Learned:**
 - Cross- sectoral coordination is highly important
 - Process of political coordination is time consuming
 - Broader political coordination on governmental level is an advantage (governmental vs. ministerial strategy)

Questions?

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