
No Easy Flight Path

Innovation, Risk and the Future of Sustainable Aviation

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Miami in 2040



What does history tell us?

FLYING MACHINES WHICH DO NOT FLY

“...the flying machine
which will really fly
might be evolved...
in from one million
to ten million years.”

THE NEW YORK TIMES EDITORIAL • OCTOBER 9, 1903

69 days later.....



....the Wright Brothers flew

The risk of standing still



PORTO ALEGRE — AIRPORT FLOODING



AUCKLAND — TERMINAL FLOODING



BRISTOL — THUNDERSTORM DAMAGE



LUTON — RUNWAY HEAT DAMAGE

AI-generated illustrations of reported events. Sources cited separately.

Three parts of the flightpath

01

USE LESS

Reduce the energy and emissions from every flight

02

POWER DIFFERENTLY

Match each mission to the right energy pathway

03

MANAGE THE TRANSITION

Move safely from demonstration to scale

Use less



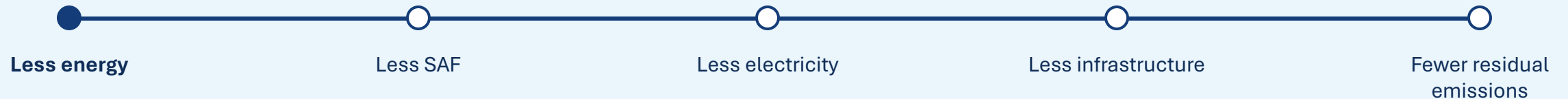
Aircraft efficiency reduces the scale of everything that follows

80%

more fuel-efficient than
early jets

15–20%

improvement with each
new aircraft generation



Use less



Photo Credit: NATS

The best fuel is the fuel you do not burn

Better use of today's fleet and airspace can reduce fuel burn now

Planning and coordination can deliver more direct routes, continuous climb and descent, less holding and shorter taxi times

Power differently



Photo Credit: INERATEC's ERA ONE Pioneer Power-to-Liquid plant at Frankfurt Höchst
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**SAF has a clear role.
The challenge is to build
genuine scale**

2.4m tonnes of SAF projected
for 2026

0.8% of global jet fuel
demand

IATA projection, June 2026

The fuel may look familiar
The risk landscape behind it is not

Power differently



Photo Credit: ZeroAvia

New propulsion changes the aircraft and the system around it

HYDROGEN A new way to power flight – with changes needed in the air and on the ground

BATTERIES Battery weight makes smaller aircraft and shorter routes the likely starting point

The challenge is to match the right solution to each type of flight

Manage the transition



Technology does not scale by itself

The greatest uncertainty often sits at the interfaces between organisations

Collaboration without consensus - progress comes when different perspectives meet early enough to influence the design

Manage the transition

From demonstration to deployment at scale

01

DEMONSTRATION

Can it work?

02

DEPLOYMENT

Can it work safely and reliably?

03

SCALE

Can it be manufactured, financed and insured?

Manage the transition

What remains

REMOVE RESIDUAL EMISSIONS Credible. Measurable. Permanent.



Photo Credit: Project DRIVE, Mission Zero Technologies Ltd/DESNZ. © Crown copyright 2026, licensed under the Open Government Licence v3.0.

BUILD CLIMATE RESILIENCE Infrastructure and operations prepared.



Illustrative image generated using AI

Reduce what we can. Remove what remains. Prepare for what is changing.

There is no easy flight path....



.... but aviation has never needed the whole route to be visible before taking the next step

Any Questions?

Decide • Commit • Act

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