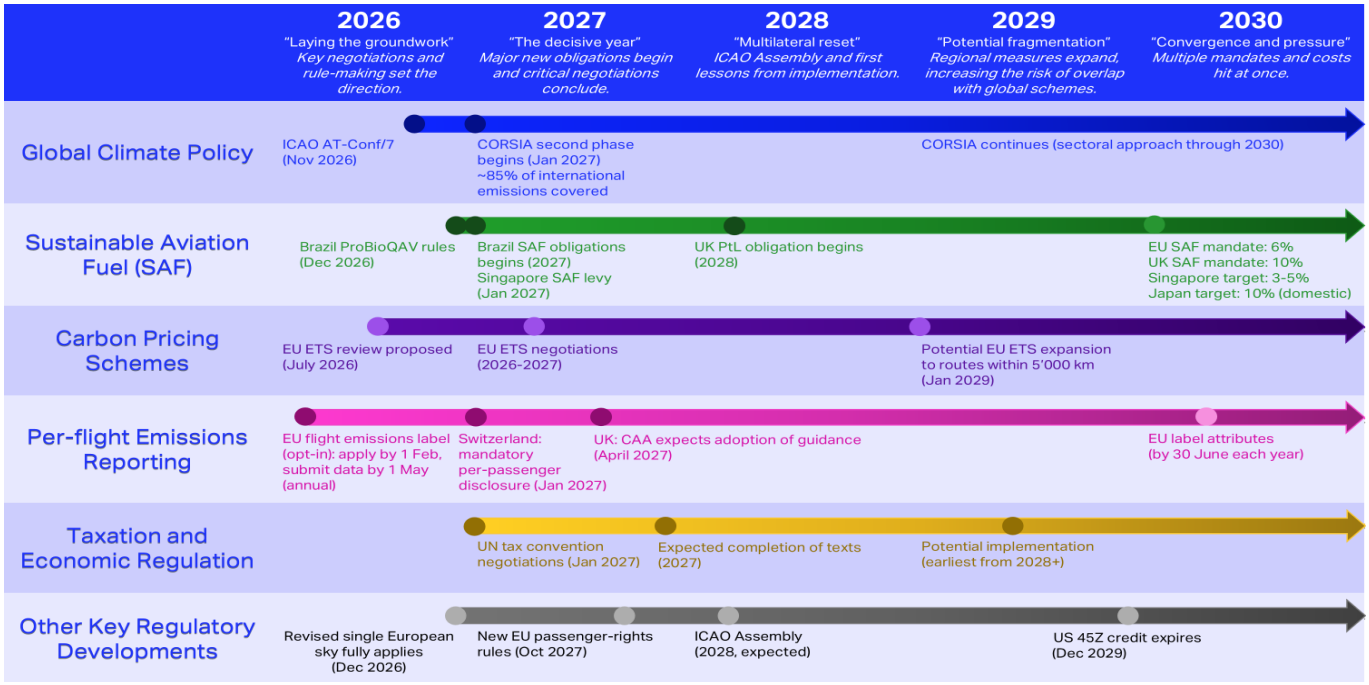
Chart of the Week

13 November 2026

Different Routes. Same Destination?

The growing risk of overlapping costs, complexity, and fragmentation in climate policy



Source: IATA Sustainability and Economics

- Between now and 2030, airlines face a rapidly thickening policy calendar. The timeline illustrates that the challenge is not simply the number of new policies. It is that measures addressing the same global activity are increasingly being designed independently across jurisdictions.
- 2027 is the decisive year. CORSIA's second phase begins, Switzerland introduces mandatory emissions information in flight offers, the UK expects adoption of its flight-emissions guidance, and negotiations on the UN Framework Convention on International Tax Cooperation are due to conclude.
- 2028 should provide a multilateral reset point. The next ordinary ICAO Assembly cycle provides an opportunity to strengthen globally coordinated approaches before national and regional measures become more deeply embedded.
- 2029 is the potential fragmentation point. The proposed expansion of the EU ETS to additional international routes would overlap with CORSIA, while the current US Section 45Z clean-fuel production credit expires at the end of the year.
- By 2030, several pressures converge. The EU SAF mandate reaches 6%, the UK mandate reaches 10%, Singapore is targeting 3–5% subject to market conditions, and airlines will continue to face carbon-pricing, reporting, and consumer-transparency requirements across multiple regimes.
- The opportunity is to focus on the destination: actual emissions reductions. Global challenges are best addressed through global frameworks, while regional and national measures should complement and strengthen those frameworks, not fragment or undermine them, because every dollar spent navigating overlapping rules is a dollar not invested in delivering the transition.

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