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Area Rule and Transonic Flight Can you explain what "Area Rule" is and what planes were developed thanks to this theory? - question from Bruno Hartmann The area rule is an important concept related to the drag on an aircraft or other body in transonic and supersonic flight. The area rule came into being in the early 1950s when production fighter designs began pushing ever closer to the sound barrier. Designers had found that the drag on these aircraft increased substantially when the planes traveled near Mach 1, a phenomenon known as the transonic drag rise illustrated below. This increase in drag is due to the formation of shock waves over portions of the vehicle, which typically begins around Mach 0.8, and this drag increase reaches a maximum near Mach 1. Because of its source, this type of drag is referred to as wave drag. Increase in wave drag at transonic Mach numbers Since the physics of supersonic flight were still largely a mystery to manufacturers, designers had no idea how to address this problem except to provide their aircraft with more powerful engines. Even though jet engine technology was rapidly advancing in those days, the first generation of jet-powered fighters was hampered by relatively low-thrust engines which limited them to subsonic flight. The US Air Force hoped to overcome this deficiency with its first dedicated supersonic fighter, the F-102 Delta Dagger. Since the transonic drag rise was still not fully understood, the F-102's designers chose an engine they believed would provide enough thrust to reach a maximum speed of about Mach 2. However, initial flight tests of the F-102 prototype indicated that the aircraft could not even reach Mach 1. The Convair engineers were baffled by this lack of performance until a NACA researcher named Dr. Richard Whitcomb developed the area rule. Whitcomb experimented with several different axisymmetric bodies and wing-body combinations in a transonic wind tunnel. What he found was that the drag created on these shapes was directly related to the change in cross-sectional area of the vehicle from the nose to the tail. The shape itself was not as critical in the creation of drag, but the rate of change in that shape had the most significant effect. For the mathematically inclined, we can say that wave drag is related to the second-derivative (or curvature) of the volume distribution of the vehicle. Whitcomb area rule test models: (a) cylindrical fuselage, (b) fuselage with wings, (c) bulged fuselage, (d) waisted fuselage with wings To illustrate the point, four of Whitcomb's experimental models are drawn above, representing a simple cylindrical fuselage, the same fuselage with wings attached, a bulged fuselage, and a "pinched" fuselage with wings. What Whitcomb discovered was that the addition of wings to the basic cylinder produced twice as much drag as the cylinder alone. He also found that drag rose by the same amount if a simple bulge were added to the cylinder, the bulge being of equivalent volume as the wings. However, if he reduced the cross-sectional area of the fuselage over the region where the wings were attached, shown as wing "D", the total drag was about the same as that of the cylinder alone. The conclusion of this research was that shaping the vehicle to create a smooth cross-sectional area distribution from the nose to the tail could drastically reduce the drag on an aircraft. The area rule tells us that the volume of the body should be reduced in the presence of a wing, tail surface, or other projection so that there are no discontinuities in the cross-sectional area distribution of the vehicle shape. Effect of the area rule on overall vehicle shape Whitcomb's findings are related to a more theoretical concept called the Sears-Haack body. This shape yields the lowest possible wave drag for a given length and volume. The variation in cross-sectional area for a Sears-Haack body, illustrating the following figure, tells us that wave drag is minimized when the curvature of the volume distribution is minimized. To close, the volume distribution of an aircraft or other high-speed vehicle comes to the ideal Sears-Haack body, the lower its wave drag will be. Volume distribution of a Sears-Haack body Whitcomb's research was a major breakthrough in supersonic aerodynamics and had an immediate effect on the design of the aforementioned F-102 fighter. Convair engineers quickly redesigned the aircraft's fuselage, taking the area rule concept into account, to create the "waisted" or "coke-bottle" fuselage. This modification, plus a new engine, allowed the aircraft to easily exceed Mach 1 and achieve a maximum speed over Mach 1.5. Effect of the area rule on the F-102 Today's supersonic fighters are fitted with much more powerful engines than were available in the 1950s, so the area rule is not as essential to their design as it used to be. However, it has found greater application to subsonic aircraft, particularly commercial airliners since they cruise at the lower end of the transonic regime. A good example is the Boeing 747, known for its distinctive "hump." This hump, which houses the cockpit and upper passenger deck, increases the cross-sectional area of the forward fuselage and has the effect of evening the volume distribution over the length of the aircraft. As a result, the 747 is able to cruise efficiently at a slightly higher speed than most other airliners since the increase in transonic wave drag is delayed. - answer by Jeff Scott, 24 November 2002 Related Topics: Read More Articles: Home Technology Cars & Other Vehicles Chapter 5 The Whitcomb Area Rule: NACA Aerodynamics Research and Innovation by Lane E. Wallace As the 1940s came to a close, military aircraft manufacturers in the United States faced a disturbing problem. The Bell X-1 had broken the so-called "sound barrier," and both the Air Force and the Navy were looking for next generation aircraft that could operate at supersonic speeds. But preliminary tests of models indicated that even the best designs put forth by industry engineers were not going to be able to achieve that goal. A sharp increase in drag at speeds approaching Mach One was proving too much for the limited-power jet engines of the day to overcome. The solution to this frustrating impasse was found by Richard T. Whitcomb, a young aerodynamicist at the National Advisory Committee for Aeronautics (NACA) Langley Research Center in Hampton, Virginia. His development of the "area rule" revolutionized how engineers looked at high-speed drag and impacted the design of virtually every transonic and supersonic aircraft ever built. In recognition of its far-reaching impact, Whitcomb's area rule was awarded the 1954 Collier Trophy. Yet it is not just the significance of the concept that makes the discovery and application of the area rule interesting. The story of its development provides insights on how innovations are "discovered" and how, even at a time when research projects were growing bigger and more complex in scope, a single, creative individual could still play a critical role in the development of new technology. In addition, while the area rule concept was applied almost universally to supersonic aircraft designs, that "success" also illustrates some of the factors that influence whether an industry applies a given technology, regardless of its inherent worth. The Transonic Drag Problem and the Area Rule Researchers in the Langley Research Center's wind tunnels had begun working with transonic airflows and the problem of transonic drag (at speeds approaching and surpassing the speed of sound) even before the end of World War II. In 1943, John Stack, head of Langley's Eight-Foot High-Speed Tunnel branch, obtained approval to increase the power in the tunnel from 8,000 horsepower to 16,000 horsepower. The upgrade, completed in the spring of 1945, allowed researchers to produce reliable airflow data in the tunnel for speeds up to Mach .95. One of the researchers working with Stack in the Eight-Foot High-Speed Tunnel was a young engineer named Richard Whitcomb. Whitcomb had been fascinated with airplanes and aerodynamics since he was a young boy, building and testing airplane models. J. James R. Hansen, Engineer in Charge: A History of the Langley Aeronautical Laboratory, 1917-1958 (Washington, DC: NASA SP-4305, 1987), pp. 313-14. 135 136 THE WHITCOMB AREA RULE: NACA AERODYNAMICS RESEARCH AND INNOVATION NACA/NASA Langley engineer Richard T. Whitcomb was awarded the 1954 Collier Trophy for his development of the "area rule," an innovation that revolutionized the design of virtually every transonic and supersonic aircraft ever built. Here Whitcomb inspects a research model in the 8-Foot Transonic Tunnel at Langley. (NASA photo no. LAL 89118). made out of balsa wood. He was hired by the Langley Research Center in 1943, aft receiving an engineering degree from the Worcester Polytechnic Institute. The Langley managers initially wanted him to work in the Flight Instrument Division, but Whitcomb stubbornly insisted that he wanted to work in aerodynamics. Fortunately, he was granted his preference and was assigned to Stack in the 8-foot wind tunnel. Initially, Whitcomb was assigned the task of performing test monitoring for other researchers. But for an eager young engineer, the key to advancement was to "run the tests and keep your eyes open, your ears open." Whitcomb recalled, "I kept coming to Gene (Draley, Stack's replacement as head of the 8-foot tunnel) and saying maybe it ought to be done this way. Let's try this. And somewhere along the way, Gene says 'OK, go try it,' and that's where I got started." 2 By July 1948, Whitcomb had developed a reputation as "someone who had ideas" 3 and was starting to pursue his own research experiments. He proposed a series of wind tunnel tests in the repowered 8-Foot High-Speed Tunnel for a variety of swept wing and fuselage combinations. He hoped the tests would uncover a configuration with significantly lower 2. Richard T. Whitcomb, interview with Walter Bonney, March 27, 1973. 3. Richard T. Whitcomb, telephone interview with author, May 2, 1995. FROM ENGINEERING SCIENCE TO BIG SCIENCE 137 drag at transonic speeds. The tests were run in late 1949 and 1950, but the results were both perplexing and discouraging. None of the combinations had much effect on reducing the drag of the models as they approached Mach One.4 Clearly, the researchers needed to know more about the behavior of airflow in the transonic region in order to figure out what was causing such a stubborn drag problem. Unfortunately, this data was difficult to obtain. Even the upgraded eight-foot wind tunnel at Langley could only reach speeds of 95 Mach. Because of the limitations of the available wind tunnels, researchers in the mid-1940s had resorted to several "stopgap" methods to try to learn more about transonic airflow. One series of experiments involved dropping instrumented test missiles from a B-29 Superfortress. Test areas were also mounted on the wings of a P-51 Mustang fighter plane that was then put into a high-speed dive. With this configuration, the airplane's wings remained stationary but the airflow over the portion of the wing holding the test airfoil surpassed the speed of sound. A third approach used rocket models launched from Wallops Island, a remote beach location across the bay from the Langley Research Center. All three methods had their drawbacks, however. The falling-body and wing-flow techniques offered less precise data than that obtained in a wind tunnel. The rocket tests produced more precise data, but they were "100 times as expensive as a wind tunnel test" and could only explore a single parameter at a time. Furthermore, the Schlieren photographs that illustrated the shock wave patterns of high-speed airflow could only be obtained in a wind tunnel.5 Consequently, it was not until Stack and his team of engineers, which included Whitcomb, developed a "slotted-throat" modification for the 8-foot wind tunnel in 1950 that transonic flows could be thoroughly explored.6 The slotted-throat modification prevented the choking that had limited the speeds in the test section of the tunnel and allowed the air to go through the speed of sound. For the first time, researchers had a tool to investigate precisely what airflow did in that speed range and what might be causing the puzzling drag they had observed. Actually, the slotted throat wind tunnel was only one of the tools Whitcomb and his associates used to investigate transonic airflows. But once that was in place, they could then employ other existing research tools to look at what the airflow was doing. In late 1951, Whitcomb tested a swept-back wing-fuselage combination in the now-transonic Eight-Foot High-Speed Tunnel.7 Tuft surveys, which used small pieces of yarn taped onto inlet and fuselage sections, were conducted to look at airflow disturbances. Coverings with pressure-sensitive openings were put on model sections to determine the velocity of the air over various areas, and Schlieren photographs were used to look at the shock wave characteristics of the model at transonic speeds.8 4. Richard T. Whitcomb, "A Proposal for a Swept Wing-Fuselage Combination at Transonic Speeds," Langley Central Files, AF 421-1, July 1948. 5. Hansen, Engineer in Charge, pp. 332-33. 6. Richard T. Whitcomb, telephone interview, May 2, 1995; Hansen, Engineer in Charge, pp. 261-70. 7. The development of the slotted-throat transonic wind tunnel at the Langley Research Center proved important enough to merit its own Collier Trophy, awarded to Stack and his associates in 1951. 8. The time delay between each of Whitcomb's initial delay and the actual wind tunnel tests of them was a result of Langley's typical but long process of designing and building wind tunnel models. It was not at all unusual for that process to take fifteen-eighteen months. Nevertheless, the time delay was frustrating and Whitcomb sometimes worked directly with wind tunnel technicians to incorporate modifications in the tunnel to avoid the delay of going through normal channels. 8. Richard T. Whitcomb and Thomas C. Kelly, "A Study of the Flow over a 45-degree Sweptback Wing-Fuselage Combination at Transonic Mach Numbers," NACA RM L5D201 June 25, 1952; Dr. Richard T. Whitcomb, "Research on Methods for Reducing the Aerodynamic Drag at Transonic Speeds," address presented at the ICASE/LARC Inaugural Eastman Jacobs Lecture, Hampton, VA, November 14, 1994, pp. 1-2; Hansen, Engineer in Charge, pp. 332-33. 138 THE WHITCOMB AREA RULE: NACA AERODYNAMICS RESEARCH AND INNOVATION The results, especially those revealed by the Schlieren photographs, showed that the shock waves created as the airflow approached the speed of sound were different and bigger than anticipated. Undoubtedly, it was the losses from these unexpected shock patterns that was causing the sharp increase in drag at transonic speeds. But the question of what was causing the shockwaves still had to be answered before researchers could try to find a way to combat the phenomenon. Several weeks later, a world renowned German aerodynamicist named Dr. Adolf Busemann, who had come to work at Langley after World War II, gave a technical symposium on transonic airflows. In a vivid analogy, Busemann described the stream tubes of air flowing over an aircraft at transonic speeds as pipes, meaning that their diameter remained constant. At subsonic speeds, by comparison, the stream tubes of air flowing over the surface would change shape, become narrower as the speed increased. This phenomenon was the converse, in a sense, of a well-known aerodynamic principle called Bernoulli's theorem, which stated that as the area of an airflow was made narrower, the speed of the air would increase. This principle was behind the design of venturis.9 as well as the configurations of Langley's wind tunnels, which were "necked down" in the test sections to generate higher speeds.10 But at the speed of sound, Busemann explained, Bernoulli's theorem did not apply. The size of the stream tubes remained constant working with this kind of flow, therefore, the Langley engineers had to look at themselves as "pipettifiers." Busemann's pipetting metaphor caught the attention of Whitcomb, who was in the symposium audience. Soon after that Whitcomb was, quite literally, sitting with his feet up on his desk one day, contemplating the unusual shock waves he had encountered in the transonic wind tunnel. He thought of Busemann's analogy of pipes flowing over a wing-body shape and suddenly, as he described it later, a light went on. The shock waves were larger than anticipated, he realized, because the stream tubes did not get narrower or change shape, meaning that any local increase in area or drag would affect the entire configuration in all directions, and for a greater distance. More importantly, that meant that in trying to reduce the drag, he could not look at the wing and fuselage as separate entities. He had to look at the entire cross-sectional area of the design and try to keep it as smooth a curve as possible as it increased and decreased around the fuselage, wing and tail. In an instant of clarity and inspiration, he had discovered the area rule. In practical terms, the area rule concept meant that something had to be done in order to compensate for the dramatic increase in cross-sectional area where the wing joined the fuselage. The simplest solution was to indent the fuselage in that area, creating what engineers of the time described as a "coke bottle" or "Marilyn Monroe" shaped design. The indentation would need to be greatest at the point where the wing was the thickest, and could be gradually reduced as the wing became thinner toward its trailing edge. If narrowing the fuselage was impossible, as was the case in several designs that applied the area rule concept, the fuselage behind or in front of the wing could be expanded to make the change in cross-sectional area from the nose of the aircraft to its tail less dramatic.11 9. A venturi, named after the 19th century Italian physicist G. B. Venturi, is one method used to generate the suction or vacuum power necessary to drive aircraft instruments. A venturi is mounted on the outside of air craft, paralleling the fuselage. As the speed of airflow through the cinched neck portion of the venturi increases, it is accompanied by a decrease in air pressure, creating suction that runs the instruments connected to the system inside the plane. 10. Whitcomb, interview, March 27, 1973. 11. Richard T. Whitcomb, "A Study of the Aero-Lift Drag-Rise Characteristics of Wing-Body Combinations Near the Speed of Sound," NACA Report 1273, Langley Aeronautical Laboratory, Langley Field, Virginia, 1956, pp. 1, 20-21; Whitcomb, interview, March 27, 1973; Whitcomb, "Research on Methods for Reducing the Aerodynamic Drag at Transonic Speeds," p. 3. FROM ENGINEERING SCIENCE TO BIG SCIENCE 139 The Pieces of the Puzzle: Creative Innovation Although the pieces may have come together in a flash of insight, there were actually several important elements and processes that contributed to Whitcomb's discovery. Whitcomb had developed a reputation as something of a "Wunderkind" at Langley because of his unique combination of knowledge and intuition about airflows; a combination that undoubtedly contributed to his discovery of the area rule. 12 The intuition may have been a gift, but his knowledge of airflow behavior was certainly enhanced by his seven years of experience working with Langley's 8-foot wind tunnel. The discovery of the area rule concept was also dependent on the previous invention of the slotted-throat tunnel design. Without that piece of technology, Whitcomb could not have gathered the information necessary to understand the causes of transonic drag. In fact, the very existence of the wind tunnels at Langley was a critical factor in allowing a new approach in design to surface and be tested. If the information had to be obtained through an elaborate, expensive flight test program, fewer ideas could have been investigated, and Whitcomb might not have had the opportunity to test his innovative theory. At Wallops Station, in Tidewater Maryland, in 1953, Langley's Pilots Aircraft Research Division (PARI) tested rocket-powered models of the delta-winged Convair F-102 before, (left) and after (right) modification to take advantage of Whitcomb's "area rule." (NASA Photo). 12. Eugene S. Ferguson, Engineering and the Mind's Eye (Cambridge, MA: MIT Press, 1992), p. 54; Hansen, Engineer in Charge, p. 332. 140 THE WHITCOMB AREA RULE: NACA AERODYNAMICS RESEARCH AND INNOVATION In addition, the projects conducted at Langley were still fairly small, individual research efforts that allowed for experimentation. This kind of atmosphere, while not entirely unique among government-funded facilities in the early 1950s, was becoming more unusual. At one time, individual or small-group research efforts had characterized many research laboratories. But the exponential growth of technology and complex technological research during World War II began to change that. The Manhattan Project, responsible for the development of the atom bomb, symbolized for many a significant shift in technological research from small, independent projects conducted by single laboratories to large, complex research programs involving many people, broad resources and funding, and multiple disciplines.13 In a bigger and more complex research environment, with approvals and decisions dependent on higher-level program managers, Whitcomb might not have had the latitude or opportunity to develop and test the area rule concept. But the NACA Langley environment offered a middle ground between a small, independent laboratory and a large research program. Whitcomb had expensive technological tools at his disposal, such as the slotted-throat wind tunnel, but he still had the independence and flexibility to develop and test a radical new concept on his own.14 Whitcomb was also assisted by the informal management environment and the orientation toward experimental research at the Langley Research Center, both of which were conducive to individual innovation. As John Becker explained in his case histories of four NACA programs, Management (at Langley) assumed that research ideas would emerge from an alert staff at all levels.... On a problem of major proportions such as transonic facilities, any scheme for research that survived peer discussions and gained section and division approvals was likely to be implemented ... and very little (paperwork) was required in the simple NACA system. Occasional chats with his division chief or department head, or a brief verbal report at the monthly department meeting were about all that was required of the NACA project engineer.15 This kind of environment was particularly well-suited to an introspective thinker like Whitcomb. Managers knew he was a talented aerodynamicist, and they were wise enough to keep his paperwork to a minimum and give him the space and freedom to think, experiment, and explore.16 Langley's orientation toward hands-on, experimental research was a significant factor in Whitcomb's discovery, as well. As opposed to researchers that focused more on theoretical research, Langley encouraged exploratory experiments such as the wind tunnel tests Whitcomb devised to investigate wing-body combinations and airflow at transonic speeds. The breakthrough on the transonic wind tunnel test, in fact, was a result of a researcher asking himself, "I wonder what would happen if I turned up the power?" That simple question—"I wonder what would happen if. . ." instigated numerous experiments at Langley that, in turn, led to significant discoveries. 17 13. James H. Capshaw and Karen A. Rader, "Big Science: Price to the Present," OSRIS, 2nd series 7 (1992); 19; Thomas P. Hughes, American Genesis: A Century of Invention and Technological Enthusiasm (New York, NY: Penguin Books, 1989), pp. 440-42. 14. John V. Becker, The High-Speed Frontier: Case Histories of Four NACA Programs, 1920-1950 (Washington, DC: NASA SP-445, 1980), pp. 117-18. 15. Ibid. 16. Hansen, Engineer in Charge, p. 341. 17. Whitcomb, interview, May 2, 1995; information on transonic wind tunnel development also in Hansen, Engineer in Charge, p. 322; and in Ch. 1 of this book. FROM ENGINEERING SCIENCE TO BIG SCIENCE 141 This curiosity-driven, experimental approach was especially significant in discovering the area rule, because there was no available theory to explain the unusual drag encountered at transonic speeds. Researchers had to come up with a creative way of reaching beyond the known, and the exploratory experiments conducted by Whitcomb and others yielded the data that allowed him to understand the cause of the transonic drag and shockwave phenomena. Conducting hands-on experiments with an aircraft model in a wind tunnel also helped Whitcomb "see" the airflow behavior in a way that mathematical formulas would not have. Still, those factors only provided the tools and environment that made Whitcomb's discovery possible. The breakthrough still required the insight of a creative mind, a mind able to "see" the problem and able to step back from accepted rules of design to contemplate a solution based on an entirely new approach. The process by which Whitcomb was able to do that offers insight itself as how scientific or technological innovation occurs. Science and technology are often viewed as fields completely divorced from any of the arts. Common phrases that distinguish something as "a science, not an art" and describe "the scientific method" as a way to discern an unassailable truth indicate our collective view of science as a rational, logical, linear, mathematical and precise process. Yet since almost the beginning of time, artistic vision has played a critical role in the advancement of technology and science. Undoubtedly, even the first cave dweller to invent the wheel first had a picture in his or her mind of what the device would look like. Albert Colquhoun, a British architect, asserted that even scientific laws are "constructs of the human mind," valid only as long as events do not prove them wrong, and applied to a solution of a design problem only after a designer develops a vision of the solution in his head.18 This artistic vision becomes even more important when a scientist or engineer needs to go beyond the leading edge of knowledge, where existing theories cease to explain events. At this point, a designer's imagination is critical in envisioning potential new solutions. As one analyst of technological development said, "The inventor needs the intuition of the metaphor maker, some of the insight of Newton, the imagination of the poet, and perhaps a touch of the irrational obsession of the schizophrenic."19 Whitcomb was not the only person to look at the problem of transonic drag. As early as 1944, German aerodynamicist Dietrich Kuchemann had designed a tapered fuselage fighter plane that was dubbed the "Kuchemann Coke Bottle" by American intelligence personnel. Kuchemann's design was not aimed at smoothing the curve of the cross-sectional area to displace the shock waves, but he had simply observed the direction of flow over a swept-wing design and was trying to design a fuselage that would follow the contours of that flow.20 Whitcomb's area rule was also, in retrospect, said to be implicit in a doctoral thesis on supersonic flow by Wallace D. Hayes, published in 1947. But the mathematical formulas employed by Hayes, as well as several other researchers working on the general problem of transonic and supersonic air flows, did not lead their creators to the necessary flash of inspiration that crystallized the area rule for Whitcomb. Why didn't they see what Whitcomb did? The answer, in part, may lie in the precise fact that they were working with mathematical formulas, instead of visual images. The answer may have been imbedded in the numbers in front of them, but they couldn't see it. 18. Ferguson, Engineering and the Mind's Eye, p. 172. 19. Hughes, American Genesis, p. 76; Hansen, Engineer in Charge, p. 311; Ferguson, Engineering and the Mind's Eye, pp. 172-73. 20. David A. Anderson, "NACA Formula Eases Supersonic Flight," Aviation Week & Space Technology 63 (September 12, 1955): 13. 142 THE WHITCOMB AREA RULE: NACA AERODYNAMICS RESEARCH AND INNOVATION What led to Whitcomb's insight was his talent to see and work with visual metaphors a skill described by Aristotle as a "sign of genius" and an important tool for seeing things from a fresh perspective, or discovering new truths about existing objects or ideas.21 In his history of American technological progress, Thomas Hughes also stressed the importance of visual metaphors in developing innovative ideas, noting that "although they are articulated verbally, the metaphors of inventors have often been visual or spatial. Inventors, like many scientists, including Albert Einstein, Niels Bohr, and Werner Heisenberg, show themselves adept at manipulating visual, or nonverbal, images." 22 When Adolf Busemann used his "pipetting" metaphor to describe the behavior of transonic air flow, Whitcomb painted a vivid picture in his mind of air "pipes" flowing over an aircraft. He then incorporated into that image the other information he had obtained through his experiments with transonic air flow. Suddenly, he "saw" what was causing the unusual shock waves and what needed to be done to combat them. In order to see a solution to a problem, however, Whitcomb also had to be willing to break free from accepted rules, or paradigms, of aerodynamics. 23 In the late nineteenth century, Ernst Mach had shown that a bullet-shaped body produced less drag in flight than any other design. This accepted "paradigm" of aircraft design led to the basic fuselage shape employed by transports, World War II fighter planes, and even the Bell X-1 rocket plane. It was also still the accepted rule of thumb as engineers began to design the first turbojet-powered supersonic aircraft. The assumption that a bullet-shaped fuselage was the most efficient aerodynamic shape, however, led researchers to look elsewhere for elements that could be modified to reduce the drag of aircraft at transonic speeds. To see the solution that Whitcomb envisioned—indenting the fuselage in the area of the wing to reduce the dramatic changes in the aircraft's overall cross-sectional area from nose to tail—required going against a "truth" that had worked and had been accepted for over fifty years. The same paradigm that had helped advance aircraft design for half a century became, ironically, one of the barriers that kept researchers from advancing aircraft design beyond subsonic flight. Why was Whitcomb able to step back and consider an approach that broke this accepted rule? For one thing, the circumstances required it. Kuhn noted that "the failure of existing rules is the prelude to a search for new ones."24 Certainly, the stubborn problem of transonic drag presented Whitcomb with a situation where existing theories and rules were not working. Secondly, Kuhn observed that "almost always, the men who achieve ... fundamental inventions of a new paradigm have been either very young or very new to the field whose paradigm they change." 25 When he came up with the area rule concept, Whitcomb was only 30 years old. Possibly, the fact that he had not spent twenty years designing bullet-shaped fuselages contributed to Whitcomb's ability to conceive of a different design. He was also something of an introspective thinker and individualistic researcher, which may have made him more able to contemplate a "fringe" idea that broke from his peer group's assumptions. In any event, Whitcomb was willing to step back from accepted truths and 21. Aristotle, *Physics*, in *The Complete Works of Aristotle*, ed. W. D. Ross, 1984, p. 255. 22. Thomas P. Hughes, *American Genesis: A Century of Invention and Technological Enthusiasm* (New York, NY: Penguin Books, 1989), p. 440. 23. The idea of a "paradigm" of science was popularized by Thomas S. Kuhn in his 1970 book *The Structure of Scientific Revolutions*, 2nd ed. (Chicago: University of Chicago Press, 1970), pp. 10-11, 24, 37, 24. Ibid., p. 68. 25. Ibid., p. 90. FROM ENGINEERING SCIENCE TO BIG SCIENCE 143 simply look at what his data was showing him: paint a visual picture of it in his mind and see not what he expected to see, but what was really there. While this may seem a simple and obvious solution to outsiders with forty years of hindsight, Whitcomb's ability to break free of the design doctrines that dominated aeronautics in his day was, in fact, a unique and remarkable ability that truly set him apart from many others in his field. Once someone comes up with an answer, it often seems obvious. But the researchers struggling with transonic drag were not aware they were caught in a paradigm that did not work. They were focused on trying to cut a workable path through a dense forest they knew as real and immutable. Whitcomb's genius was his ability to see that the problem was not the path, but the forest itself. From Idea to Application When Whitcomb presented his concept of the area rule to some of his colleagues at Langley, he encountered skepticism. After all, it was a radical approach to aircraft design. But division chief John Stack still allowed Whitcomb to present the idea at the next technical seminar. And listening to Whitcomb's presentation, this time, was Adolf Busemann, whose stature in the aerodynamics community was such that his opinion carried a great deal of weight. Busemann, whose visual pipetting metaphor had provided the catalyst to Whitcomb's discovery, understood what Whitcomb had seen. He told the others present that Whitcomb's idea was "brilliant." The skepticism among some of the others, including Stack, remained. But the support from Busemann was enough to get Whitcomb to go ahead to test his theory. 26 Throughout the first quarter of 1952, Whitcomb conducted a series of experiments using various area-rule based wing-body configurations in Langley's 8-Foot High-Speed Tunnel. As he expected, indenting the fuselage in the area of the wing did, indeed, significantly reduce the amount of drag at transonic speeds. In fact, Whitcomb found that "indenting the body reduced the drag-rise increments associated with the unswept and delta wings by approximately 60 percent near the speed of sound," virtually eliminating the drag rise created by having to put wings on a smooth, cylindrical shaped body.27 In a simple world, this validation of Whitcomb's theory would have been sufficient for the principle to be applied to all new industry designs. All that would have been necessary would have been to notify the aircraft manufacturers that a better design approach had been developed. The world is not that simple, however, and the inherent worth of an innovation is rarely enough for it to be incorporated into commercial products. As Louis B.C. Fong, director of the Office of Technology Utilization at NASA (National Aeronautics and Space Administration) commented in 1963, "In this age of automation, there is nothing automatic about the transfer of knowledge or the application of an idea or invention to practical use ... there is resistance to new ideas and new technologies; part practical ... and often economic."28 26. Whitcomb, interview, May 2, 1995; Hansen, Engineer in Charge, p. 336. 27. Whitcomb, "A Study of the Aero-Lift Drag-Rise Characteristics of Wing-Body Combinations Near the Speed of Sound," pp. 20-21. 28. Louis B.C. Fong, *Dir., NASA Office of Technology Utilization, "The NASA Program of Industrial Applications,"* address at the Third National Conference on the Peaceful Uses of Space, Chicago, IL, May 8, 1963, NASA Historical Reference Collection, NASA History Office, NASA Headquarters, Washington, DC. 144 THE WHITCOMB AREA RULE: NACA AERODYNAMICS RESEARCH AND INNOVATION NACA or NASA engineers tend to measure the success of a new idea or technology strictly in terms of technical objectives met. Industry, on the other hand, measures innovative success in terms of profit dollars generated within a specified payback period.29 Consequently, a new approach or technology, even if it is technically superior to what is currently in use, may not be adopted by industry if its cost involves extra costs for the manufacturer. These costs may be in tooling for a new design, replacing machinery, or even in retaining employees or changing the manufacturing process. As engineers, the industry factors can produce a new idea or technology within a company, and overcoming that resistance can be a difficult process.30 There are a couple of situations in which new technology may be rapidly assimilated into commercial products, however. One is if it can be incorporated with minimal extra cost, and a second is if it solves a problem that a manufacturer needs to solve.31 When Whitcomb developed his area rule, there was a manufacturer in each of these situations, and that fact played a significant role in the speed with which his innovation began to impact the design of new aircraft. While Whitcomb was conceiving and testing his area rule concept, the Convair Division of General Dynamics was developing what it hoped would be the company's first supersonic aircraft. The Convair F102 "Delta Dagger" was designed to be a long-range interceptor, with delta wings and the most powerful turbojet engine available at that time, the Pratt & Whitney J-57. 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In mid-August 1952, a group of Convair engineers were at Langley to observe the performance of the F102 model in the Eight-Foot High-Speed Tunnel. Shown the disappointing test results, the engineers asked the NACA engineers if they had any other design. This accepted "paradigm" of aircraft design led to the basic fuselage shape employed by transports, World War II fighter planes, and even the Bell X-1 rocket plane. It was also still the accepted rule of thumb as engineers began to design the first turbojet-powered supersonic aircraft. The assumption that a bullet-shaped fuselage was the most efficient aerodynamic shape, however, led researchers to look elsewhere for elements that could be modified to reduce the drag of aircraft at transonic speeds. To see the solution that Whitcomb envisioned—indenting the fuselage in the area of the wing to reduce the dramatic changes in the aircraft's overall cross-sectional area from nose to tail—required going against a "truth" that had worked and had been accepted for over fifty years. The same paradigm that had helped advance aircraft design for half a century became, ironically, one of the barriers that kept researchers from advancing aircraft design beyond subsonic flight. Why was Whitcomb able to step back and consider an approach that broke this accepted rule? For one thing, the circumstances required it. Kuhn noted that "the failure of existing rules is the prelude to a search for new ones."24 Certainly, the stubborn problem of transonic drag presented Whitcomb with a situation where existing theories and rules were not working. Secondly, Kuhn observed that "almost always, the men who achieve ... fundamental inventions of a new paradigm have been either very young or very new to the field whose paradigm they change." 25 When he came up with the area rule concept, Whitcomb was only 30 years old. Possibly, the fact that he had not spent twenty years designing bullet-shaped fuselages contributed to Whitcomb's ability to conceive of a different design. He was also something of an introspective thinker and individualistic researcher, which may have made him more able to contemplate a "fringe" idea that broke from his peer group's assumptions. In any event, Whitcomb was willing to step back from accepted truths and 21. Aristotle, *Physics*, in *The Complete Works of Aristotle*, ed. W. D. Ross, 1984, p. 255. 22. Thomas P. Hughes, *American Genesis: A Century of Invention and Technological Enthusiasm* (New York, NY: Penguin Books, 1989), p. 440. 23. The idea of a "paradigm" of science was popularized by Thomas S. Kuhn in his 1970 book *The Structure of Scientific Revolutions*, 2nd ed. (Chicago: University of Chicago Press, 1970), pp. 10-11, 24, 37, 24. Ibid., p. 68. 25. Ibid., p. 90. FROM ENGINEERING SCIENCE TO BIG SCIENCE 143 simply look at what his data was showing him: paint a visual picture of it in his mind and see not what he expected to see, but what was really there. While this may seem a simple and obvious solution to outsiders with forty years of hindsight, Whitcomb's ability to break free of the design doctrines that dominated aeronautics in his day was, in fact, a unique and remarkable ability that truly set him apart from many others in his field. Once someone comes up with an answer, it often seems obvious. But the researchers struggling with transonic drag were not aware they were caught in a paradigm that did not work. They were focused on trying to cut a workable path through a dense forest they knew as real and immutable. 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But the support from Busemann was enough to get Whitcomb to go ahead to test his theory. 26 Throughout the first quarter of 1952, Whitcomb conducted a series of experiments using various area-rule based wing-body configurations in Langley's 8-Foot High-Speed Tunnel. As he expected, indenting the fuselage in the area of the wing did, indeed, significantly reduce the amount of drag at transonic speeds. In fact, Whitcomb found that "indenting the body reduced the drag-rise increments associated with the unswept and delta wings by approximately 60 percent near the speed of sound," virtually eliminating the drag rise created by having to put wings on a smooth, cylindrical shaped body.27 In a simple world, this validation of Whitcomb's theory would have been sufficient for the principle to be applied to all new industry designs. All that would have been necessary would have been to notify the aircraft manufacturers that a better design approach had been developed. The world is not that simple, however, and the inherent worth of an innovation is rarely enough for it to be incorporated into commercial products. As Louis B.C. Fong, director of the Office of Technology Utilization at NASA (National Aeronautics and Space Administration) commented in 1963, "In this age of automation, there is nothing automatic about the transfer of knowledge or the application of an idea or invention to practical use ... there is resistance to new ideas and new technologies; part practical ... and often economic."28 26. Whitcomb, interview, May 2, 1995; Hansen, Engineer in Charge, p. 336. 27. Whitcomb, "A Study of the Aero-Lift Drag-Rise Characteristics of Wing-Body Combinations Near the Speed of Sound," pp. 20-21. 28. Louis B.C. 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