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MODERNISING AIRPORT SLOT POLICY FOR THE ASIA-PACIFIC REGION

Presented by Airports Council International (ACI)

SUMMARY

Persistent congestion at major airports in the Asia-Pacific is reshaping how access to scarce airport capacity is allocated, used and renewed over time. The administrative slot system established by the Worldwide Airport Slot Guidelines (WASG) has delivered global coordination, but its foundational principles predate liberalisation and the rapid growth of capacity-constrained airports across the Region. Building on ACI World's working paper A42-WP/242 to the 42nd Session of the ICAO Assembly, and the encouragement of the Assembly's Economic Commission for continued engagement on slot modernisation taking into account local infrastructure realities, this paper sets out a regional perspective on five proposed reforms: acknowledging the role of the global airport slot coordination framework (Worldwide Airport Slot Board) as a technical coordination tool; setting globally standardised airport slot data and reporting; a structured and transparent role for airports in the slot coordination process; defined conditions governing the continuity of historic slots; and oversight of slot mobility within the administrative system. These regional priorities are consistent with, and draw on, the reform areas identified in the ACI World White Paper on Airport Slot Allocation.

MODERNISING AIRPORT SLOT POLICY FOR THE ASIA-PACIFIC REGION

1. INTRODUCTION

1.1 Airport slot allocation has evolved from a technical scheduling tool into a structural feature of the global aviation system. At capacity-constrained airports, the administrative slot framework set out in the Worldwide Airport Slot Guidelines (WASG)[1] determines who is able to access scarce airport infrastructure, when, and on what terms. It therefore directly shapes connectivity, competition, infrastructure investment decisions and the broader socio-economic contribution of aviation to the communities served by airports.

1.2 The principles underpinning slot allocation were established in the early 1970s[2], in a pre-liberalisation environment characterised by State-owned flag carriers, publicly owned airports, and limited congestion at a small number of major hubs. Liberalisation is about allowing airlines to operate in the market with commercial freedom, meaning they can decide where to fly, how often and at what price. At capacity-constrained airports, however, it is the slot system that determines who can operate and when. In such cases, commercial freedom is already contingent on holding a slot. Over time, the interpretation that historic precedence alone can deliver stable expectations for investment and planning has become increasingly difficult to reconcile with the liberalised market environment. While the framework has since been refined through successive editions of the WASG and through the establishment in 2020 of the Worldwide Airport Slot Board (WASB), giving airport operators a formal role alongside airlines and coordinators, its core principles continue to reflect the assumptions of that earlier era.

1.3 The relevance of these foundations to today's capacity-constrained environment was examined by ACI in its working paper *Toward a Modern Airport Slot Policy Framework for Social and Economic Growth* (A42-WP/242, EC/20)[3], presented to the Economic Commission of the 42nd Session of the ICAO Assembly. The Commission, in its report (A42-WP/660), encouraged Member States to continue engaging in ongoing discussions on the modernisation of airport slot practices, while taking into consideration local infrastructure realities[4]. ACI Asia-Pacific & Middle East (ACI APAC & MID) presents this paper to bring the regional perspective into that dialogue. The analysis and proposed reforms set out in this paper are consistent with the ACI World White Paper on Airport Slot Allocation, which represents the global airport community's position on modernisation of the slot system.

[1]Worldwide Airport Slot Guidelines (WASG), jointly published by IATA, ACI and the Worldwide Airport Coordinators Group (WWACG). The WASG, currently in its 4th Edition (effective with the Northern Summer 2027 season), is the principal global reference for airport slot allocation.

[2]IATA Scheduling Procedures Guide, first published in 1974, which provided the foundation for what subsequently became the Worldwide Slot Guidelines (WSG) and, from 2020, the Worldwide Airport Slot Guidelines (WASG).

[3]ICAO, A42-WP/242 (EC/20), *Toward a Modern Airport Slot Policy Framework for Social and Economic Growth*, presented by ACI to the Economic Commission of the 42nd Session of the ICAO Assembly (Montréal, 23 September – 3 October 2025), under Agenda Item 26: Economic Development of Air Transport.

[4]ICAO, A42-WP/660 (EC/50), Draft Report of the Economic Commission on Agenda Item 26, 42nd Session of the ICAO Assembly, paragraph on airport slot policy modernisation.

2. BACKGROUND AND REGIONAL CONTEXT

2.1 Demand for air travel is growing more rapidly in the Asia-Pacific than anywhere else in the world. Six of the world's ten fastest-growing aviation markets are within the Region[5]. By 2043, ACI projects global passenger traffic to reach approximately 17.7 billion, an almost twofold increase from 2024 levels, with the Region absorbing a disproportionate share of that growth.

2.2 This growth is occurring against a backdrop of intensifying capacity pressures. The number of fully slot-coordinated (Level 3) airports rose globally from approximately 170 in 2015 to 214 by the Northern Summer 2026 season, and schedule-facilitated (Level 2) airports increased from approximately 120 to 181 over the same period. Together, Level 3 airports now account for more than 40 per cent of global air traffic. A significant and rising share of these constrained airports is located in the Region, including major gateways in South Asia, East Asia, South-East Asia, Oceania and the Middle East.

2.3 States and airport operators in the Region are advancing one of the world's most ambitious airport infrastructure investment programmes. As noted in DGCA — 60/IP/04/15 presented jointly by ACI APAC & MID and CANSO at the 60th DGCA Conference, combined investments of approximately USD 240 billion are planned for 30 major gateways across the Region between 2025 and 2035, with the potential to deliver capacity for approximately 1.24 billion additional passengers. Even with this unprecedented investment, lead-times of a decade or more, environmental and community constraints, and the rapid pace of demand recovery mean that many gateways are likely to remain capacity-constrained well into the next decade. Slot allocation will continue to be the primary mechanism through which access to that scarce capacity is managed.

2.4 The legitimacy of any administrative system that allocates a scarce, publicly regulated resource depends on whether its outcomes continue to serve the public interest. The ICAO Secretariat's 2000 study on slot allocation, reviewed by the Air Transport Committee and by the Conference on the Economics of Airports and Air Navigation Services (ANSConf 2000)[6], already identified concerns about chronic shortages of airport capacity and the responsiveness of existing allocation mechanisms. Twenty-five years on, those concerns are markedly more acute, particularly in the Asia-Pacific.

3. MODERNISE THE PRINCIPLES OF THE AIRPORT SLOT POLICY

3.1 The WASG is guided by a small set of underlying principles — certainty, flexibility, preservation of legacy arrangements, neutrality and transparency — which remain valid in themselves but continue to be understood through a pre-liberalisation lens. Modernisation does not require abandoning the administrative slot system or replacing it with market-based allocation mechanisms. Instead, it requires reforming these principles through a series of reforms to reflect today's operational, market and public-interest realities, while preserving the global compatibility that the WASG provides. Such reforms include:

[5]DGCA — 60/IP/04/15, *Strengthening Airport and ATM Cooperation to Meet Capacity Demand*, presented by ACI and CANSO at the 60th Conference of Directors General of Civil Aviation, Asia and Pacific Regions, Sendai, Japan, 28 July – 1 August 2025.

[6]ICAO Secretariat Study on the Allocation of Flight Departure and Arrival Slots at International Airports, reviewed by the Air Transport Committee in February 2000 and by the Conference on the Economics of Airports and Air Navigation Services (ANSConf 2000) held in June 2000. Available on the ICAO website at www.icao.int/sustainability/pages/eap_ep_slots.aspx.

- Acknowledging the role of the global airport slot coordination framework as a technical coordination tool;
- Setting Globally standardised airport slot data and reporting
- Defining structured and transparent role for airports in the slot coordination process;
- Governing historic slot continuity through defined conditions;
- Oversight of slot mobility within the administrative system and treatment of scarcity value arising from slot mobility

4. DISCUSSION: PROPOSED REFORMS FOR MODERNISATION

Any modernisation of the slot allocation system should be viewed as a question of governance over scarce and strategic airport infrastructure, not only technical schedule coordination.

4.1 REFORM 1: Acknowledging the role of Worldwide Airport Slot Board as a technical coordination Group

4.1.1 At the global level, the WASB should focus on maintaining basic common coordination processes, data standards and transparency. It should not extend to standardising the detailed application of the WASG framework at individual airports, including how secondary criteria and new entrant priority are applied, how traffic types are distributed, how historic continuity is maintained, and how local rules are taken into account. The role of the WASB should continue to include:

- Maintain the global slot coordination calendar and standard coordination milestones;
- Provide guidance on communication and transparency best practices; and
- Provide time-limited guidance when extraordinary circumstances that threaten the stability or sustainability of the aviation system as a whole arise.

4.1.2 The role of the WASB should also include developing tools that recognise the inherently local nature of how the airport slot framework is applied:

- Support consistency in basic common coordination processes (such as coordination timelines, data formats and key coordination steps) across jurisdictions, while recognising that national regulatory frameworks take precedence;
- Maintain a transparent repository of local slot practices and relevant criteria for information and comparability purposes, to support predictability and compliance for airlines, without affecting the autonomy of States or competent authorities; and
- Develop standardised airport slot data reporting covering both slot use and resulting outcomes to enable global benchmarking and analysis, including by academic and policy institutions.

4.2 REFORM 2: Globally standardised airport slot data and reporting

4.2.1 Transparency in the airport slot system has focused primarily on the information needed to participate effectively in slot coordination as an airline, while also supporting airport planning. This includes visibility into coordination parameters, slot allocations, indications of slot availability and high-level information on the application of provisions such as justified non-use and secondary criteria. These forms of transparency remain essential for coordination to function efficiently and predictably.

4.2.2 At present, slot series are not identified in a consistent way across coordinators, limiting the ability to understand how slots are used in practice or compare approaches across airports and jurisdictions. Addressing this gap would not represent a technical challenge, but would require agreement on common data standards and their incorporation into existing slot management systems.

4.2.3 A fair, neutral and transparent system must be supported by consistent, verifiable and comparable information that allows relevant stakeholders to understand where capacity is available, how slots are allocated, and how they are used in practice over time. To support systemic transparency, ACI APAC & MID recommends that the WASB, airports and slot coordinators should implement the following:

- Develop a globally compatible approach to slot data reporting at capacity-constrained airports, with requirements proportionate to the level of coordination and the complexity of capacity constraints. This approach should build on existing coordination data and processes and be designed to support comparability and analysis across coordination periods and across airports.
- Establish clear and role-appropriate access to information, whereby coordinators continue to publish the information required for coordination, while enhanced system-level reporting enables States, airports and other relevant stakeholders to understand how scarce airport capacity is allocated and used over time.

4.3 REFORM 3: Structured and transparent role for airports in the slot coordination process

4.3.1 Modernised slot policies should integrate local capacity and policy goals into a globally harmonised framework. This can be achieved by strengthening accountability for access outcomes at the level where their consequences arise.

4.3.2 The slot framework was established in an era when public authorities played a direct role in airport ownership, investment and aviation policy. In that context, the public interest in access outcomes was addressed largely outside the slot framework itself. As airports and airlines have evolved to operate in increasingly liberalised markets, the assumption that public-interest considerations are addressed elsewhere is no longer valid in many jurisdictions of the Asia-Pacific. The proximity to infrastructure performance and local operating conditions places airports at the point where State-defined public-interest considerations related to access, capacity use and long-term development arise most directly.

4.3.3 In addition, as operators of fixed, capital-intensive infrastructure, airports are best placed to understand how capacity is delivered in practice, where constraints arise and how infrastructure development can support long-term capacity needs. This enables them to identify bottlenecks, promote operational improvements and champion solutions that support the most efficient use of scarce infrastructure in coordination with other operational partners.

However, today the slot allocation system gives priority to incumbent airlines on the basis of historic precedence, with limited input from the airports whose infrastructure is being used.

4.3.4 The governance framework must now better reflect airports' role in the coordination process ensuring that access to scarce capacity is managed in a way that remains aligned with local policy objectives and the public interest. This includes the determination of coordination parameters based on infrastructure capacity and service-level constraints in consultation with operational partners; the definition of local access priorities consistent with applicable national policy objectives, set in advance

and applied without discrimination; and periodic, structured reviews of slot use outcomes, while preserving the independence of the slot coordination function.

4.4 REFORM 4: Efficient use of scarce airport capacity - Governing historic slot continuity through defined conditions

4.4.1 Under conditions of persistent congestion, to ensure that priority treatment at allocation remains meaningful in practice, the slot framework should strengthen the relationship between allocation criteria and subsequent use. Conditions currently associated with historic precedence, notably slot usage requirements (the so-called "80/20 rule") and safeguards against misuse, are insufficient under persistent capacity constraints.

4.4.2 At congested airports today, the primary condition for retaining access to capacity over time is compliance with the minimum utilisation threshold of 80 per cent of a slot series under historic precedence[7]. This threshold provides a clear and predictable test, but it was not designed to assess how slots, and by extension scarce airport capacity, are used once congestion becomes a widespread and permanent feature. As a result, slots may be retained indefinitely on the basis of utilisation alone, even where their use over time no longer reflects the basis on which priority was originally granted. However, the conditions under which the administrative model must remain sustainable have changed. The effects of how scarce capacity is used have become more consequential not only for airlines, but also for the performance of the aviation system and the communities it serves. The long-term sustainability of the slot system should therefore no longer be understood solely as preserving all aspects of an allocation model developed under pre-liberalisation assumptions. It increasingly depends on whether the outcomes it produces command legitimacy in the context in which the framework is now applied, including whether they support connectivity and economic development, and respond to the expectations of communities affected by how airport infrastructure is used.

4.4.3 To complement, and in combination with, existing requirements related to slot utilisation and safeguards against misuse, ACI APAC & MID supports the development, at the airport level and under State oversight where required, of structured, periodic reviews of slot use outcomes. Such reviews would examine whether historic slot series continue to align with the efficient use of declared capacity. They would not involve assessment of individual airline strategies, routes or services, nor any ad hoc or case-by-case intervention in scheduling decisions. The criteria for continuity should be set out in advance, publicly documented and applied to future scheduling seasons, with sufficient notice for airlines to adjust their operations. Under such an approach, airlines retain commercial freedom in how slots are used within their existing holdings, while the administrative system retains the ability to return slots to the pool in future seasons where those criteria are no longer met.

4.5 REFORM 5: Oversight of airport slot mobility within the administrative system

4.5.1 Slot mobility, including secondary trading where permitted under applicable legal frameworks, plays a growing role at the most congested airports in the Region. It can serve legitimate operational purposes — fleet optimisation, schedule adjustments and network coordination. However, where mobility operates outside the transparency of the primary administrative allocation process, it can weaken

[7]WASG, paragraph 8.4. Under the WASG 4th Edition, effective from the Northern Summer 2027 season, a series of slots will become seven slots for the Northern Summer season.

neutrality and contestability, and the economic value associated with scarce capacity may accrue without visibility into the conditions under which access has evolved.

4.5.2 ACI APAC & MID considers that any exchange or transfer involving a material exchange of value, whether monetary or through reciprocal arrangements, should be subject to clear disclosure requirements, established in advance. The criteria and thresholds that trigger review should be publicly documented. Where review is required, it should be carried out by the slot coordinator acting independently, in accordance with criteria endorsed by the competent authority.

4.5.3 Where monetisation is permitted in practice under national law, a portion of any monetary value created by constrained capacity should contribute to expanding or improving that capacity, for example through capacity, efficiency or resilience improvements at the airport concerned. This is consistent with ICAO's long-standing policy direction on the cost basis for airport charges and the principle that aviation infrastructure should be developed and maintained in the public interest, as set out in ICAO's Policies on Charges for Airports and Air Navigation Services (Doc 9082).

5. REGIONAL CONSIDERATIONS FOR THE ASIA-PACIFIC

5.1 Asia-Pacific presents a diverse regulatory and institutional landscape. Some States have long-established slot coordination frameworks aligned with the WASG, including independent slot coordinators; others have developed national slot regulations reflecting their specific market conditions; and a number of States are introducing or formalising slot coordination at recently designated Level 2 or Level 3 airports. This diversity is a strength when it allows the slot framework to remain globally compatible while accommodating local infrastructure and policy realities.

5.2 At the same time, the Region faces several common challenges that argue for sustained, coordinated dialogue on slot policy modernisation, including:

- rapid growth at major hubs, combined with the emergence of new capacity-constrained airports in markets that were not historically slot-coordinated;
- substantial airport infrastructure investments that need to be aligned with airspace and air traffic management capacity — a point already raised by ACI APAC & MID and CANSO in DGCA — 60/IP/04/15 — and with effective slot management, so that declared capacity is delivered in practice; and
- the strategic importance, in many States of the Region, of connectivity to remote communities, secondary cities and Small Island Developing States, where the practical operation of liberalised market access depends on equitable access to constrained airport capacity at congested gateways.

5.3 ACI APAC & MID is committed to working with States/Administrations, slot coordinators, airlines and other stakeholders in the Region to advance the modernisation of the airport slot allocation system without prejudice to the global compatibility of the WASG, by strengthening the accountability for access outcomes at the level where their consequences arise, and enhancing the long-term legitimacy of the administrative slot system. These efforts are consistent with the spirit of the ICAO's Long-term Vision for International Air Transport Liberalization adopted by the Council in June 2015[8], the Manual

[8]ICAO's Long-term Vision for International Air Transport Liberalization, adopted by the ICAO Council in June 2015 and disseminated to Member States by State Letter 2015/54. See also Resolution A41-15 (consolidated statement of ICAO continuing policies in the air transport field).

on the Regulation of International Air Transport (Doc 9626), and the Strategic Objective on the Economic Development of Air Transport.

6. ACTION BY THE CONFERENCE

6.1 The Conference is invited to:

a) note the analysis set out in this paper and support continued engagement by States/Administrations of the Asia-Pacific region in the modernisation of airport slot policy, in line with discussion at the Economic Commission of the 42nd Session of the ICAO Assembly (A42-WP/660);

b) acknowledging the role of the Worldwide Airport Slot Board as a technical coordination group at global level on airport slot allocation framework;

c) encourage States/Administrations to assess jointly with the aviation stakeholders key policy reforms for modernising airport slot allocation, including:

- setting globally standardised airport slot data and reporting;
- a structured and transparent role for airports in the slot coordination process;
- defined conditions governing the continuity of historic slots; and
- oversight of slot mobility within the administrative system.

— END —