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Agenda Item 3: Strengthening regulatory and institutional frameworks

3.2: Enhancing air connectivity through progressive economic and regulatory aviation frameworks for international air transport

ENHANCING GLOBAL CONNECTIVITY AND SUPPLY CHAIN RESILIENCE THROUGH THE LIBERALIZATION OF AIR CARGO SERVICES

(Presented by Qatar)

EXECUTIVE SUMMARY

This paper highlights the increasing strategic importance of air cargo services in supporting global trade, supply chain resilience, economic development and connectivity. The expansion of cross-border e-commerce, the growing integration of global value chains and evolving logistics requirements have reinforced the critical role of air cargo in the global economy. The paper emphasizes the need for regulatory frameworks that recognize the unique operational characteristics of all-cargo services and support greater operational flexibility to enhance connectivity, efficiency and responsiveness to market demand.

Action: The conference is invited to:

- recognize the increasing strategic importance of air cargo services in supporting global trade, supply chain resilience and economic development;
- encourage States to consider more liberal approaches to air cargo services in air services agreements, with a view to enhancing operational flexibility, including the provisions listed in paragraphs 2.4 to 2.6 relating to commercial opportunities, operational flexibility and traffic rights; and
- request the International Civil Aviation Organization (ICAO) to continue supporting States in the implementation of air cargo liberalization through policy guidance and dissemination of best practices.

<i>Strategic Goal:</i>	This working paper relates to Strategic Goal: <i>The Economic Development of Air Transport Assures the Delivery of Economic Prosperity and Societal Well-Being for All.</i>
<i>Financial implications:</i>	
<i>References:</i>	ICAO Strategic Plan 2026-2050 Resolutions Adopted by the 42nd Session of the Assembly, Provisional Edition, October 2025 (ICAO Assembly Resolution A42-26)

1. INTRODUCTION

1.1 Air cargo has become an increasingly important component of the global economy and international air transport system. The rapid expansion of cross-border e-commerce, increasing integration of global value chains and growing demand for time-sensitive transportation have significantly increased the strategic importance of efficient air cargo services.

1.2 Recent global disruptions have further highlighted the essential role of air cargo in maintaining the movement of goods, supporting supply chain resilience and facilitating the transport of critical products. As economies become increasingly interconnected, the ability of air cargo operators to respond quickly and efficiently to market requirements will remain essential.

1.3 The International Civil Aviation Organization (ICAO) forecasts indicate that global air traffic is expected to more than double by 2050. This unprecedented growth will place increasing demands on the global aviation system and reinforce the need for modern and flexible regulatory frameworks that support efficient cargo operations, enhance connectivity and enable operators to respond effectively to evolving market and supply chain requirements.

1.4 Qatar recognizes the strategic role of air cargo in facilitating trade, economic diversification and international connectivity. Consistent with the objectives of the Qatar National Vision 2030, Qatar has supported the development of a globally connected aviation sector and has pursued policies that facilitate international air transport and logistics activities.

1.5 Qatar has concluded more than 180 air services agreements worldwide, many of which incorporate liberalized or open-skies provisions. Through its participation in ICAO's work on air transport regulation, including the ongoing review of the Template Air Services Agreements (TASA) and the drafting work relating to updated provisions for all-cargo services, Qatar continues to support the modernization of international air transport regulatory frameworks.

1.6 During FY2025/2026, Qatar Airways Cargo transported more than 2.8 million tonnes of cargo through its entire network supported by a fleet of over 260 aircraft, enabling the movement of pharmaceuticals, perishables, live animals, e-commerce shipments, industrial products, and humanitarian relief across global supply chains by connecting the country to more than 170 passenger (belly-hold) destinations and over 70 dedicated cargo destinations worldwide. In addition, Qatar Airways Cargo opened a state-of-the-art Animal Centre in 2024 - the world's largest animal facility spanning 5,260 square meters, which set new standards for live animal transport.

2. DISCUSSION

2.1 Air cargo services differ from passenger operations in several important respects. Cargo demand is often highly dynamic and can be influenced by seasonal factors, changing trade policies, shifts in global trade patterns, supply chain disruptions, geopolitical developments, humanitarian requirements, industrial production cycles and evolving consumer demand. As a result, cargo operators frequently require a higher degree of operational flexibility to adapt rapidly to changing market conditions and maintain resilient and efficient supply chains.

2.2 Air cargo has acquired strategic importance due to the continued growth of cross-border e-commerce and the increasing integration of global value chains. Efficient cargo connectivity has become

a critical component of economic competitiveness and an important facilitator of international trade, particularly for time-sensitive and high-value goods.

2.3 Despite the progress achieved in liberalizing international air transport, many air services agreements continue to contain restrictions affecting all-cargo operations. Such restrictions reduce the ability of operators to respond effectively to market demand and optimize cargo networks.

2.4 The characteristics of all-cargo services require regulatory frameworks that provide sufficient flexibility to support efficient logistics networks and supply chain resilience. To better reflect contemporary cargo operations, States should consider incorporating in their air services agreements the following provisions regarding commercial opportunities for all-cargo services allowing carriers:

- a) non-discriminatory treatment with respect to access to facilities for cargo clearance, handling, storage and facilitation;
- b) the ability, subject to national laws and regulations, to use or directly operate other modes of transport as part of integrated logistics and supply chain solutions;
- c) the use of leased aircraft, provided that applicable safety and security requirements are met;
- d) the ability to enter into cooperative arrangements with other air carriers, including code-sharing, blocked-space arrangements and interline agreements; and
- e) the freedom to establish cargo tariffs without filing or approval requirements by aeronautical authorities.

2.5 In addition to the commercial opportunities set out in paragraph 2.4, the efficient operation of all-cargo networks requires a corresponding degree of operational flexibility. States should therefore consider provisions enabling carriers to:

- a) operate flights in either or both directions;
- b) combine different flight numbers within one aircraft operation;
- c) serve intermediate and beyond points, and points in the territories of the Parties in any combination and in any order;
- d) omit stops at any point or points;
- e) transfer traffic from any of its aircraft to any of its other aircraft at any point (change of gauge);
- f) make stopovers at any points whether within or outside the territory of either Party;
- g) carry transit traffic through the territory of the other Party;
- h) combine traffic on the same aircraft regardless of where such traffic originates; and
- i) serve more than one point on the same service (co-terminalisation).

2.6 These commercial opportunities and operational flexibilities should be reinforced by the granting of full third, fourth and fifth freedom traffic rights for all-cargo services, without limitation in terms of capacity, frequencies, aircraft equipment and routing.

2.7 Looking towards the future and considering the growing importance of global supply chains, e-commerce and integrated logistics networks, States should begin examining the potential benefits of granting seventh freedom traffic rights for all-cargo services. Such arrangements could provide

additional flexibility for cargo operators, facilitate the development of more efficient logistics networks and contribute to enhanced connectivity, trade facilitation and supply chain resilience.

2.8 These provisions can contribute significantly to improving cargo connectivity, enhancing network efficiency, strengthening supply chain resilience and supporting the development of global trade. They also recognize the increasingly integrated nature of modern logistics operations and the importance of allowing operators to optimize routing, capacity deployment and market responsiveness.

2.9 The ongoing work within ICAO to review and modernize the TASA, including provisions relating to all-cargo services, provides an important opportunity to support States in developing regulatory frameworks that better reflect contemporary cargo operations and evolving market requirements.

2.10 Qatar's experience demonstrates the benefits that can be achieved through connectivity-oriented aviation policies and modern market access frameworks. The development of Qatar as a global logistics and aviation hub, supported by extensive international air transport agreements and a strong cargo network, illustrates the contribution that air cargo can make to economic development, trade facilitation and global connectivity.

3. CONCLUSION

3.1 Air cargo has become a strategic enabler of global trade, economic development and supply chain resilience. The increasing importance of e-commerce, integrated supply chains and time-sensitive logistics underscores the need for regulatory frameworks that facilitate efficient and responsive cargo operations.

3.2 Greater operational flexibility and progressive liberalization of air cargo services can contribute to enhanced connectivity, improved network efficiency and stronger economic outcomes. Modern all-cargo provisions relating to intermodal operations, cooperative arrangements, leasing, tariff freedom and traffic rights can help ensure that regulatory frameworks remain aligned with evolving market realities.

3.3 Looking ahead, States should continue reviewing and modernizing market access arrangements applicable to all-cargo services, while giving due consideration to future opportunities for enhanced operational flexibility and market access, including seventh freedom traffic rights. Such efforts will support the development of more resilient supply chains, stronger trade links and a more connected global economy.

3.4 ICAO's ongoing work on air transport liberalization and the modernization of regulatory guidance material provides an important opportunity to support States in developing regulatory approaches that recognize the evolving role of air cargo and facilitate its continued contribution to global economic development.

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