ATConf/7-WP/214
17/11/26

SEVENTH WORLDWIDE AIR TRANSPORT CONFERENCE (ATCONF/7)

Montréal, HQ, 16 to 20 November 2026

Agenda Item 2: Fostering aviation growth and air connectivity through investments in infrastructure, human capital and partnerships
2.2: Investment for the development and modernization of civil aviation infrastructure

DRAFT REPORT

(9 pages)

Agenda Item 2: Fostering aviation growth and air connectivity through investments in infrastructure, human capital and partnerships

2.2 Investment for the development and modernization of civil aviation infrastructure

2.2.1 DOCUMENTATION

2.2.1.1 WP/152, presented by Brazil, Airports Council International (ACI), Aviation Services Association (ASA World), Civil Air Navigation Services Organisation (CANSO), the International Coordinating Council of Aerospace Industries Associations (ICCAIA), the International Federation of Air Line Pilots' Association (IFALPA) and the International Federation of Air Traffic Controllers' Associations (IFATCA), and co-sponsored by Singapore and the United Arab Emirates, emphasized the importance of coordinated and economically sustainable air traffic management (ATM) modernization to accommodate future aviation growth, strengthen operational resilience and support emerging aviation operations. The paper highlighted the need for sustained investment in modern ATM and airspace infrastructure, global interoperability and harmonisation. It also stressed that coordinated implementation through the International Civil Aviation Organization's (ICAO) Global Air Navigation Plan (GANP) and the proposed Minimum Implementation Path (MIP), could reduce fragmentation and costs while improving investment certainty. The Conference was invited to encourage States to integrate ATM modernization into national infrastructure strategies, promote transparent and economically sustainable financing, and support ICAO's efforts to strengthen globally coordinated and interoperable implementation.

2.2.1.2 WP/37, presented by China, examined coordinated development of facilities and capabilities, covering all-cargo aircraft operations, cargo terminals and regulatory facilities, special cargo handling, digital systems, and multimodal connectivity. Drawing on the experience of China's Ezhou Huahu Airport in developing a specialized air cargo hub, the paper provided practical lessons for developing countries in planning cargo infrastructure according to market demand and local conditions, with a view to strengthening supply chain resilience, improving trade facilitation, and promoting regional economic development. The Conference was invited to request ICAO to facilitate the voluntary sharing of good practices in developing specialized air cargo hubs, encourage States to strengthen project preparation, and support capacity-building in developing countries, including through China's offer to share its experience with Ezhou Huahu Airport.

2.2.1.3 WP/141, presented by the Dominican Republic, and co-sponsored by the United Arab Emirates, proposed an integrated approach to modernizing air navigation services, drawing on the country's experience in upgrading communications, navigation, surveillance, air traffic management automation and meteorological systems. The paper highlighted the importance of aligning infrastructure investments with projected traffic demand, operational redesign, financial sustainability, asset life-cycle management and workforce readiness. Drawing on the project to restructure Dominican Republic airspace, it demonstrated how coordinated technology upgrades, revised procedures and personnel training can improve capacity and operational resilience. The Conference was invited to encourage States to adopt integrated planning when prioritizing modernization projects and recommend that ICAO provide practical guidance and case studies to support implementation across different national contexts.

2.2.1.4 WP/47, presented by Indonesia, and co-sponsored by ACI highlighted the connectivity and financing challenges faced by archipelagic and geographically isolated States, where low traffic volumes, high infrastructure costs, climate vulnerability and operational constraints hinder the provision of sustainable air services. The paper emphasized the importance of innovative financing mechanisms, including public-private partnerships, blended finance and development bank support, alongside

assessments of the socio-economic benefits of aviation infrastructure. It also highlighted the limitations of national-level connectivity indicators in identifying underserved areas and proposed exploring sub-national connectivity analysis to better target investment. The Conference was invited to encourage the exchange of best practices, request ICAO to compile guidance and case studies on sustainable infrastructure financing models, explore innovative financing mechanisms, promote consideration of socio-economic and connectivity benefits in investment decisions, and examine the feasibility of sub-national connectivity measurement.

2.2.1.5 WP/60, presented by Indonesia, emphasized the importance of linking airport capacity assessments and future demand forecasts with infrastructure investment planning. The paper proposed strengthening capacity planning through demand scenarios, capacity gap analysis, capacity development options, investment triggers, phased implementation, and periodic reassessment, while considering airport capacity within the wider air transport network. Such an approach can assist States in aligning infrastructure development with actual and projected demand, efficiently utilizing investment resources, and responding to changing traffic and operating conditions. The Conference was invited to encourage States to strengthen the integration of capacity assessment, demand forecasting and investment planning, adopt flexible and phased approaches to capacity development, and request ICAO to enhance relevant guidance and facilitate the exchange of best practices on airport capacity planning and infrastructure investment.

2.2.1.6 WP/46, presented by Japan, and co-sponsored by ACI, proposed that future international air transport policy should focus not only on promoting growth through expanded market access, but also on investing in aviation infrastructure and human resources. The paper emphasized the importance of predictable, long-term policy frameworks that integrate aviation into national development plans, as well as creating an enabling environment to facilitate investment. It also highlighted the need to diversify airport management models, strengthen stakeholder cooperation, and optimize the utilization of existing infrastructure, and invest in human resources. The Conference was invited to recognize the importance of sustained investment, flexible approaches tailored to States' circumstances, and enhanced cooperation among governments and aviation stakeholders to expand capacity and make effective use of existing infrastructure.

2.2.1.7 WP/143, presented by Namibia on behalf of 54 Member States of African Civil Aviation Commission (AFCAC)[1], highlighted the potential of the Cape Town Convention and Aircraft Protocol to improve access to aircraft financing by reducing legal uncertainty and creditor risks. The paper emphasized that treaty accession alone does not guarantee lower aircraft prices or leasing costs; benefits depend on appropriate declarations, effective national implementation, predictable enforcement procedures and airlines' creditworthiness. It proposed a structured African implementation-support programme to identify legal and operational gaps, strengthen institutional capacity and assess the impact on financing terms. The Conference was invited to encourage States to accede to and effectively implement both instruments, request ICAO and relevant partners to strengthen implementation guidance and capacity-building and promote evidence-based monitoring of their effects on financing costs, fleet renewal and air connectivity.

2.2.1.8 WP/73, presented by Saudi Arabia, highlighted that a transparent, stable and predictable regulatory environment is critical to reducing avoidable regulatory uncertainty and lowering financing costs for aviation infrastructure projects. The paper proposed four adaptable ex-ante regulatory mechanisms:

[1] Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cabo Verde, Central African Republic, Chad, Comoros, Congo, Côte d'Ivoire, Democratic Republic of the Congo, Djibouti, Egypt, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Sao Tome and Príncipe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Togo, Tunisia, Uganda, United Republic of Tanzania, Zambia, Zimbabwe.

determining the treatment of approved investments for cost recovery before financial commitments are made, clarifying how subsequent regulatory changes apply, defining the circumstances under which regulatory decisions may be reopened, and ensuring continuity when successor decisions are delayed. It emphasized that greater predictability could improve project bankability and reduce financing premiums while preserving States' regulatory authority, protecting users and maintaining appropriate allocation of project risks. The Conference was invited to recognize the importance of predictable regulatory treatment for efficient infrastructure investment and request ICAO to develop practical, non-prescriptive guidance on the proposed four adaptable ex-ante mechanisms in consultation with relevant stakeholders.

2.2.1.9 WP/75, presented by Saudi Arabia, and co-sponsored by Egypt, emphasized that air transport liberalization and expanded market access alone are insufficient to realize the projected growth of global air traffic without adequate airport and air navigation capacity and infrastructure modernization. The paper highlighted that infrastructure bottlenecks could lead to congestion, service degradation, undermining aviation's contribution to economic growth. It proposed a more integrated approach linking liberalization, infrastructure development, including improved use of data to identify capacity gaps and stronger mechanisms to mobilize investment. The Conference was invited to request ICAO to recognize the interdependence of liberalization and infrastructure, leverage infrastructure and supply chain data to inform policy and capacity planning, establish a platform to facilitate infrastructure financing and modernization, and urge States to integrate infrastructure projects into national aviation priorities and strategies.

2.2.1.10 WP/74, presented by South Africa on behalf of 54 Member States of AFCAC[2], reported on Africa's efforts to translate Africa's identified aviation infrastructure gaps into bankable and implementable projects. The paper outlined five Aviation Infrastructure Project Pipelines following the 2023 Aviation Infrastructure Gap Analysis, which identified 60 infrastructure gaps across aerodromes, air navigation services and aircraft equipage. Building on the outcomes of the 2026 African Air Transport Convention and Expo in Lomé, it emphasized the need to strengthen project preparation, feasibility studies, demand forecasting, financial modelling and risk allocation, while promoting regional and cross-border projects to advance identified priorities. The Conference was invited to recognize Africa's coordinated framework for advancing infrastructure projects, request ICAO to strengthen practical guidance on project preparation and financing and encourage development of finance institutions and partners to provide project-preparation support and appropriate financing and risk-mitigation instruments.

2.2.1.11 WP/175, presented by the United Arab Emirates and Oman, emphasized the urgent need to modernize airspace infrastructure and air navigation services to keep pace with global air traffic growth and protect the value of investments in aviation. The paper highlighted inconsistent service levels and separation standards over the high seas, as well as capacity constraints and outdated fixed routes in continental airspace, which can increase delays, fuel consumption and emissions while placing pressure on safety. It proposed three complementary priorities: harmonized Minimum Service Level Requirements (MSLR) for high-seas airspace; enhanced airspace structures, including dynamic airspace management and free-route operations; and accelerated implementation of ICAO Project 30/10 to reduce aircraft separation where operationally safe. The Conference was invited to urge ICAO to prioritize the development of MSLR for high-seas airspace, accelerate coordinated implementation of enhanced airspace structures and Project

[2] Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cabo Verde, Central African Republic, Chad, Comoros, Congo, Côte d'Ivoire, Democratic Republic of the Congo, Djibouti, Egypt, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Sao Tome and Príncipe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Togo, Tunisia, Uganda, United Republic of Tanzania, Zambia, Zimbabwe.

30/10 across oceanic and continental airspace, and establish performance indicators, milestones and regular reporting to the ICAO Council to monitor progress.

2.2.1.12 WP/109, presented by ACI, and supported by Indonesia, highlighted the need for substantial long-term investment in airport infrastructure to accommodate projected passenger traffic growth. The paper emphasized the importance of consistent implementation of ICAO's policies on charges set out in *ICAO's Policies on Charges for Airports and Air Navigation Services* (Doc 9082), enabling airports to recover costs and finance development, supported by proportionate economic oversight and stable, predictable and transparent institutional, legal and regulatory frameworks. It also highlighted the role of diversified financing sources, commercially sustainable airport business models, and private-sector participation in strengthening airport financial viability and attracting investment. The Conference was invited to reaffirm airports' role as strategic assets and competitive businesses, encourage States to implement Doc 9082 and establish a stable investment climate, and promote market access and connectivity to support long-term infrastructure investment.

2.2.1.13 WP/25, presented by the International Air Transport Association (IATA), emphasized the importance of effective economic regulation and independent oversight of airports and air navigation services providers (ANSPs) to ensure that infrastructure investment is efficient and charges remain consistent with Doc 9082. The paper highlighted the need for adequately resourced regulators to scrutinize costs, investment plans, reasonable returns and risk allocation, regardless of ownership or financing arrangements. It also stressed that appropriate regulatory frameworks should be established before privatization or concession arrangements, supported by transparent cost allocation, meaningful user consultation and safeguards against excessive transfer of financial risks to users. The Conference was invited to reaffirm ICAO's charging principles, request ICAO to monitor and support their effective implementation, strengthen economic oversight frameworks, promote demand-driven infrastructure investment, and limit pre-funding to exceptional circumstances subject to appropriate safeguards.

2.2.2 **DISCUSSION**

2.2.2.1 The Conference emphasized the need for sustained investment in the development and modernization of civil aviation infrastructure to accommodate projected air traffic growth, enhance air connectivity and support the long-term sustainability and resilience of the air transport system. The need for integrated, evidence-based planning encompassing airport and air navigation infrastructure, human capital, supply chains and financing was highlighted. Support was expressed for aligning infrastructure investment planning with traffic forecasts, capacity assessments, operational requirements and national development priorities, while ensuring the efficient utilization of existing infrastructure. The interdependence of market liberalization and infrastructure development was acknowledged, while it was stressed that infrastructure development should not be a precondition for liberalizing air services agreements, as liberal agreements can send clear market signals that stimulate investment.

2.2.2.2 The importance of mobilizing adequate and sustainable financing for aviation infrastructure development and modernization was widely recognized. Particular attention was drawn to the need to strengthen project preparation, financial viability, investment readiness and appropriate risk allocation to attract public and private investment. Support was expressed for diversified financing approaches, including public-private partnerships, concessions and blended finance, as well as enhanced cooperation between States and development finance institutions, taking into account different national circumstances and investment needs.

2.2.2.3 The need for coordinated modernization of air navigation infrastructure and air traffic management systems was widely emphasized. Broad support was provided for the efforts to enhance global interoperability, harmonized implementation and sustained investment in modern ATM capabilities, in line with ICAO's GANP, regional Air Navigation Plans (ANPs) and related implementation initiatives. Attention was also drawn to the need to integrate human capital development, including workforce planning, training and competency requirements, into infrastructure modernization. Several States shared experiences in modernizing specialized aviation infrastructure, including air cargo facilities and air navigation services systems. It was stated that harmonized service levels and implementation should be performance-based and phased, taking into account the different starting point and capabilities of States.

2.2.2.4 The Conference highlighted the importance of stable, transparent and predictable economic regulatory frameworks in facilitating infrastructure investment. Broad support was expressed for the continued application of ICAO's policies on charges in Doc 9082, including the principles of cost relatedness, transparency, non-discrimination, and consultation with users, as well as appropriate economic oversight. Some delegations expressed reservations regarding proposals for additional oversight requirements or restrictions on pre-funding, cautioning against overly prescriptive oversight frameworks, and emphasizing the need to preserve flexibility in financing major infrastructure projects and maintaining consistency with existing ICAO policies and guidance.

2.2.2.5 Financing challenges associated with infrastructure development and modernization were highlighted, particularly in developing countries, archipelagic States and regions with limited traffic volumes or constrained financial resources. It was highlighted that project preparation and bankability represent often greater constraints than the availability of capital. The need for flexible financing and infrastructure development approaches adapted to local circumstances was underscored, recognizing that essential air services may not always be commercially viable. The contribution of non-scheduled aviation services to connectivity in underserved areas was also noted.

2.2.2.6 The Conference also considered the importance of effective implementation of the Cape Town Convention and Aircraft Protocol in facilitating access to aircraft financing. Several States emphasized that ratification should be accompanied by appropriate domestic legislation, predictable judicial and administrative procedures, and effective enforcement mechanisms. Support was expressed for strengthened technical assistance and capacity-building, including cooperation among ICAO, relevant international organizations and regional partners, to facilitate implementation and improve access to aircraft financing.

2.2.2.7 The following information papers were noted by the Conference: WP/181 presented by Brazil, WP/34 and WP/35 presented by China, WP/197 presented by India, WP/204 presented by Japan, WP/157 presented by Malaysia, WP/208 presented by Mexico and WP/ 117 presented by Uruguay.

2.2.3 **CONCLUSION**

2.2.3.1 As a result of the documentation considered and ensuing discussion on investment for the development and modernization of civil aviation infrastructure under Agenda Item 2.2, the Conference concluded that:

a) sustained investment in civil aviation infrastructure is essential to accommodate traffic growth, enhance air connectivity, improve operational efficiency and resilience, and support the long-term sustainability of international air transport;

b) infrastructure investment planning should be based on comprehensive assessments of current and projected traffic demand, capacity requirements, operational needs, socioeconomic benefits analysis, and workforce requirements, while promoting the efficient utilization of existing infrastructure and adopting flexible and phased development approaches suited to national circumstances;

c) coordinated modernization of airport and air navigation infrastructure, including air traffic management systems, is essential to enhancing capacity, efficiency, resilience and global interoperability, supported by ICAO's GANP and related implementation initiatives, and implemented in a phased manner reflecting the different starting points of States;

d) mobilizing adequate and sustainable financing remains a significant challenge for aviation infrastructure development and modernization, particularly in developing countries and underserved regions. Strengthening project preparation and bankability, investment readiness, and appropriate risk allocation, together with diversified financing approaches and partnerships with financial institutions, can facilitate the mobilization of public and private investment;

e) stable, transparent and predictable institutional, legal and economic regulatory frameworks are essential to attracting long-term infrastructure investment and reducing regulatory uncertainty. Effective economic oversight and consistent implementation of ICAO's policies on charges, as contained in Doc 9082, are important to ensuring an appropriate balance between the financial sustainability of infrastructure providers, efficient investment, reasonable charges and the interests of users;

f) ICAO should continue supporting infrastructure development and modernization through guidance, capacity-building, technical assistance and cooperation with States and industry stakeholders;

g) wider participation in and effective implementation of the Cape Town Convention and Aircraft Protocol, with implementation support, is an essential element in ensuring access to aircraft financing and fleet renewal; and

h) a non-prescriptive guidance on ex-ante regulatory mechanisms for prudent and efficient airport and air navigation investment in support of States and project bankability should be developed.

2.2.4 RECOMMENDATION

Recommendation 2/2 — Investment for the development and modernization of civil aviation infrastructure

The Conference recommends that:

a) States strengthen infrastructure investment planning through comprehensive assessment of current and projected demand, capacity requirements, operational needs, and socio-economic benefits analysis, and workforce requirements, while promoting the efficient utilization of

existing infrastructure and adopting flexible and phased approaches suited to national circumstances;

b) States promote coordinated development and modernization of airport and air navigation infrastructure, including air traffic management systems, in accordance with relevant ICAO global and regional plans and guidance, with a view to enhancing capacity, efficiency, resilience and interoperability;

c) States establish and maintain stable, transparent and predictable institutional, legal and economic regulatory frameworks that facilitate sustainable infrastructure investment, while ensuring effective and proportionate economic oversight, appropriate stakeholder consultation and consistent implementation of ICAO's policies on charges contained in Doc 9082, taking into account the financial sustainability of infrastructure providers and the interests of users;

d) States strengthen project preparation and investment readiness, including through feasibility studies, demand forecasting, financial modelling and appropriate risk allocation, and explore diversified financing approaches, including public-private partnerships, blended finance, development finance and other appropriate financing and risk-mitigation mechanisms, taking into account national circumstances and project viability;

e) States be encouraged to consider accession to, and effective implementation of, the Cape Town Convention and the Aircraft Protocol, to facilitate access to aircraft financing and fleet renewal;

f) ICAO continue to develop and enhance practical guidance, tools and capacity-building assistance to support States in aviation infrastructure investment planning, capacity assessment, project preparation, financing approaches, workforce planning and economic regulatory frameworks, including through the exchange of relevant experiences, case studies and good practices;

g) ICAO facilitate the exchange of experiences and good practices on sustainable and resilient infrastructure development, including capacity planning, innovative financing approaches, infrastructure modernization and human capital development;

h) ICAO, in collaboration with relevant partners to promote and support the effective implementation of the Cape Town Convention and Aircraft Protocol, including through technical assistance and capacity-building; and

i) ICAO should consider the possibility of developing a non-prescriptive guidance on ex-ante regulatory mechanisms for prudent and efficient airport and air navigation investment in support of States and project bankability.

— END —