



WORKING PAPER

**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

2.1: Integrating civil aviation into national development and investment plans

**SUSTAINING THE BENEFITS OF AIR TRANSPORT LIBERALIZATION THROUGH
CONTINUOUS INVESTMENT IN INFRASTRUCTURE AND HUMAN CAPITAL**

(Presented by Japan)

EXECUTIVE SUMMARY

Since the Sixth Worldwide Air Transport Conference (ATConf/6), air transport liberalization and the expansion of market access have contributed significantly to the growth of international air transport networks. As demand for air transport is expected to continue to grow, the importance of investment in aviation infrastructure and human resources is becoming increasingly evident.

This Working paper proposes 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, as well as creating an enabling environment to facilitate such investment. In this context, the paper discusses the importance of long-term policy visions that provide predictability, diverse airport management models, stakeholder cooperation, the effective utilization of existing infrastructure, and investment in human resources.

Action: The conference is invited to:

- a) recognize that, while air transport liberalization and expanded market access continue to play an important role in the development of international aviation, adequate investment in aviation infrastructure and human resources is increasingly becoming essential to sustain the benefits generated by such growth;
- b) recognize the importance of establishing an environment that promotes long-term investment in aviation infrastructure and human resources through enhanced predictability of the operating environment; and
- c) recognize the importance of enabling States to pursue approaches suited to their individual circumstances and of promoting cooperation among governments, airport operators, airlines, and other stakeholders in advancing infrastructure development, capacity enhancement, and the effective utilization of existing infrastructure.

<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>	None.
<i>References:</i>	None.

1. INTRODUCTION

1.1 Since the Sixth Worldwide Air Transport Conference (ATConf/6), air transport liberalization and the expansion of market access have been promoted as key policy priorities in international civil aviation. In Japan, the growth of international air transport networks has been supported not only through the implementation of Open Skies policies, but also through measures such as capacity enhancement at major airports, including those in the Tokyo metropolitan area, and the improvement of air traffic management systems.

1.2 Global air transport demand is expected to continue to grow over the long term, with passenger traffic projected to increase to approximately 2.7 times the 2024 level by 2050. Particularly strong growth is expected in the Asia-Pacific and Middle East regions, further underscoring the importance of investment in aviation infrastructure and human resources to support such growth.

1.3 This Working paper seeks to initiate discussion on investment in aviation infrastructure and human resources, with a view to ensuring that the benefits generated by air transport liberalization can be sustained over the long term.

2. DISCUSSION

2.1 Achievements of Liberalization and the Need for Sustained Investment

2.1.1 Air transport liberalization and expanded market access have contributed significantly to the growth of international air transport networks and improvements in passenger convenience. In Japan, international air connectivity has been enhanced through the implementation of Open Skies policies, together with measures such as capacity enhancement at metropolitan airports and the promotion of market entry by low-cost carriers (LCCs). As a result, the number of weekly international frequencies increased from 2,649 flights per week in 2010, when Japan initiated its Open Skies policies, to 5,679 flights per week as of the end of October 2025, more than doubling over this period.

2.1.2 As traffic has increased, further expanding capacity at congested airports and in the airspace, as well as securing human resources have become important policy challenges. In response to growing demand, Japan has pursued measures including capacity enhancement at metropolitan airports, improvement of air traffic management systems, and the planned development of aviation personnel, including pilots and mechanics. In addition, the recovery and growth of air transport demand following the COVID-19 pandemic have highlighted the need to secure sufficient ground handling and aviation security personnel.

2.1.3 These experiences demonstrate that the growth generated through liberalization can only be sustained through continued investment in aviation infrastructure and human resources. Future international air transport policy should therefore place greater emphasis not only on promoting growth through expanded market access, but also on investment in aviation infrastructure and human resources, together with fostering an enabling environment that facilitates such investment.

2.2 Creating an Enabling Environment for Long-Term Investment

2.2.1 Long-Term Policy Vision Based on National Strategies

2.2.1.1 Aviation infrastructure, airports in particular, comprises long-lived public capital assets that require extended periods for planning, construction, operation, and renewal, while generating benefits

over many years. Accordingly, the development and expansion of aviation infrastructure require sustained and carefully planned investment from a long-term perspective.

2.2.1.2 At the same time, air transport demand may fluctuate significantly in the short term due to economic conditions, pandemics, natural disasters, and other external factors. To enable airport operators, airlines, and private investors to make informed long-term investment decisions, it is important to ensure predictability in the operating environment through stable and long-term policy frameworks. In this regard, States should clearly articulate the direction of aviation infrastructure development and operation within national strategies and development plans and provide long-term and predictable policy guidance.

2.2.1.3 In Japan, aviation infrastructure has been positioned as a socio-economic foundation in national strategies and comprehensive development plans since the 1960s, and has been developed continuously from a long-term perspective. As a result, a diverse range of aviation infrastructure has been established, ranging from airports serving as major international gateways to airports supporting local communities, thereby forming the foundation of Japan's air transport network. This experience demonstrates the importance of long-term policy visions and predictable investment environments in facilitating the steady development of aviation infrastructure.

2.2.2 Diverse Airport Management Models and Stakeholder Cooperation

2.2.2.1 Airports differ considerably in terms of size, role, and market conditions. While some airports function as key nodes within international air transport networks, others play a vital role in supporting local communities. Passenger volumes, revenue structures, and opportunities for private-sector participation also vary from airport to airport. Accordingly, Japan employs a variety of airport management models, including nationally managed airports, locally managed airports, and corporatized airports, including those operated under concession arrangements, reflecting the characteristics and circumstances of individual airports and regions.

2.2.2.2 Regardless of the management model adopted, meeting future air transport demand and achieving the necessary investment and capacity enhancement require the involvement of a broad range of stakeholders, including governments, airport operators, airlines, and local authorities. In particular, initiatives such as airport capacity expansion and workforce development cannot be achieved by any single entity and must be pursued through cooperation among multiple stakeholders. In Japan, such initiatives have likewise been advanced through close collaboration among relevant stakeholders. To enable such cooperation, it is important that national strategies and development plans clearly set out the direction of aviation infrastructure development and operation, thereby allowing stakeholders to share common long-term objectives and work together in accordance with their respective roles and responsibilities.

2.2.3 Considerations for Creating an Enabling Environment

2.2.3.1 Addressing future growth in air transport demand requires not only investment in new infrastructure, but also the effective utilization of existing infrastructure and investment in the human resources that support the aviation sector.

2.2.3.2 In Japan, airport capacity has been enhanced not only through runway and terminal development but also through measures such as revised flight procedures and improvement of air traffic management systems. Furthermore, efforts are underway to improve passenger processing capacity through closer coordination among airports, airlines, and border control agencies (CIQ), with a view to promoting digitalization across the airport.

2.2.3.3 At the same time, against the backdrop of demographic change and growing post-pandemic demand, Japan is facing personnel shortages in areas such as ground handling and aviation security. To address these challenges, efforts are being made to improve productivity by promoting digitalization and automation, and strengthen workforce recruitment and training.

3. CONCLUSION

3.1 Air transport liberalization and expanded market access have contributed significantly to the development of international aviation. However, sustaining these achievements over the long term requires continued investment in aviation infrastructure and human resources. Future international air transport policy should therefore place investment in aviation infrastructure and human resources among its key policy priorities alongside the continued promotion of market access.

3.2 It is desirable that States clearly define the role of aviation infrastructure within national strategies and development plans and enhance the predictability of the operating environment in order to facilitate long-term investment.

3.3 It is desirable that States make use of airport management arrangements suited to their individual circumstances and create conditions that enable governments, airport operators, airlines, and other stakeholders to work together to deliver the infrastructure and capacity enhancements required to meet future growth in air transport demand.

3.4 In addition to new infrastructure development, the efficient utilization of existing infrastructure and investment in human resources are important to achieve sustainable growth in international aviation.

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