ORGANISATION DE L'AVIATION CIVILE INTERNATIONALE

INTERNATIONAL CIVIL AVIATION ORGANIZATION

Report on the

Evaluation of ICAO's Economic Development of Air Transport Strategic Objective

EV/2026/1

Office of Internal Oversight

Prepared by:	Gugsa Yimer Farice, Evaluation Specialist Achim Engelhardt, Evaluation Consultant
Reviewed and approved by:	Malika Mukhitdinova (Chief, OIO)
Final Draft Issued	March 23, 2026
Action plan completed:	June 7, 2026
Final report issued:	June 8 2026

TABLE OF CONTENTS

TABLE OF CONTENTS i
FIGURES ii
ACRONYMS i
EXECUTIVE SUMMARY 1
INTRODUCTION AND BACKGROUND 5
EVALUATION PURPOSE, SCOPE & STAKEHOLDERS 8
Evaluation Purpose 8
Evaluation Scope and Clients 8
Evaluation Criteria and Questions 8
METHODOLOGY 9
Data Collection 9
Data Analysis and Quality Assurance 10
Ethical Considerations 10
FINDINGS 11
Relevance 11
Coherence 17
Effectiveness 21
Efficiency 39
Sustainability 44
Cross-cutting Criteria 49
CONCLUSIONS AND RECOMMENDATIONS 51
Conclusions 51
Recommendations 54
Lessons learned 55
ANNEX 1: MANAGEMENT ACTION PLAN i
ANNEX 2: THEORY OF CHANGE v

FIGURES

Figure 1: Stakeholder consultations – regional breakdown 9
Figure 2: Relevance of economic development aspects (n=89) 12
Figure 3: Infographic with regional views of relevance 13
Figure 4: ICAO Assembly resolutions (2020 – 2025) and their linkages to economic development 14
Figure 5: Alignment of ICAO's economic development standards/policies, programmes and initiatives/projects with other ICAO's standards/policies, programmes and projects/initiatives (n=82) 20
Figure 6: Summary – effectiveness of monitoring and evaluation performance 22
Figure 7: Planned versus achieved activities under the Economic Development of Air Transportation Strategic Objective 23
Figure 8: Activities under the Economic Development Strategic Objective 2023 to 2025 24
Figure 9: ICAO contribution to components under the Economic Development Strategic Objective 25
Figure 10: Member States' and administrations' perception of effectiveness of work on ICAO's Economic Development Strategic Objective (n=63) 25
Figure 11: Member States' and administrations' perception of the effectiveness of ICAO economic development support- regional breakdown by aggregated effectiveness scores (n=63) 35
Figure 12 : Effectiveness of ICAO economic development support: accomplishments and challenges (n=63) . 36
Figure 13: Utility of ICAO's regulations and policies/practices in addressing the current practices and challenges of the aviation sector (n=62) 37
Figure 14: ICAO's Regular Budget and Expenditure for Economic Development of Air Transport 2020 -2024 . 41
Figure 15: Efficiency criteria for the implementation of the Strategic Objective on Economic Development (n=53) 44
Figure 16: Regional perspectives on the efficiency of implementing the Strategic Objective on Economic Development (n-53) 44
Figure 17: Sustainability aspects of ICAO's work on the Economic Development Strategic Objective (n=55) ... 47
Figure 18: Challenges to the sustainability of the economic development of air transport in ICAO member States and Administrations 48
Figure 19: Reconstructed Theory of Change for the Economic Development Strategic Objective vi

ACRONYMS

ANB	Air Navigation Bureau
ANS	Air Navigation Services
ATB	Air Transport Bureau
ATConf/7	Seventh Worldwide Air Transport Conference
APAC	Asia and Pacific Region
CDI	Capacity Development and Implementation Bureau
CMRT	Corporate Monitoring and Reporting Tool
CPMR	Corporate Planning, Monitoring and Reporting
DAC	OECD Development Assistance Committee
EDAT SO	Economic Development of Air Transport Strategic Objective
ESAF	Eastern and Southern African Region
EUR/NAT	European and North Atlantic Region
FTK	Freight Tonne-Kilometres
GDP	Gross Domestic Product
IATA	International Air Transport Association
ICAN	ICAO Air Services Negotiation Event
ICAO	International Civil Aviation Organization
iPacks	Implementation Packs
JSC	Joint Support Committee
LTAG	Long-Term Aspirational Goal
MID	Middle East Region
NACC	North American, Central American and Caribbean Region
NCLB	No Country Left Behind
OECD	Organisation for Economic Co-operation and Development
OIO	Office of Internal Oversight
OSG	Office of the Secretary General
RO	Regional Office
RPK	Revenue Passenger-Kilometres
SAF	Sustainable Aviation Fuel
SAM	South American Region
SARPs	Standards and Recommended Practices
SDG	Sustainable Development Goal
WACAF	Western and Central African Region

EXECUTIVE SUMMARY

1. The 2025 Work Programme of the Office of Internal Oversight (OIO) includes the Evaluation of ICAO's Economic Development of Air Transport Strategic Objective (EDAT SO), undertaken in line with the OIO Charter and the ICAO Evaluation Policy. The evaluation assesses the relevance, coherence, effectiveness, efficiency, and sustainability of ICAO's work under the EDAT SO from January 2020 to June 2025, drawing on document review, face-to-face and virtual interviews, and Member State survey. The intended users of the evaluation are the Air Transport Bureau (ATB), Office of the Secretary General (OSG), the Regional Offices (ROs), other ICAO Bureaus, the ICAO Council, and Member States. Other users include industry and ICAO partners, who may draw on the findings and lessons learned as appropriate.

Key findings and conclusions

2. ICAO's work under the EDAT SO is generally relevant and aligned with the needs and expectations of Member States. At the same time, there is a significant opportunity to better align ICAO's global offerings with the differentiated expectations of Member States. Industrialized economies tend to prioritize tailored analytics, facilitation mechanisms, and pragmatic bilateral support, while developing economies focus more on enhancing connectivity, securing financing, and building institutional capacity.

3. While Assembly resolutions provide a clear and authoritative policy foundation for the EDAT SO, emerging priorities are not always swiftly integrated into operational planning. For instance, issues such as taxation, reaffirmed under Resolution A41-27 in 2022, had not yet been reflected in the Operating Plan at the time of this evaluation.

4. The EDAT SO currently lacks a results framework that clearly defines the intended impact with related outcomes, outputs, indicators, a programmatic structure and resources for tracking progress. Monitoring and evaluation of ICAO's economic development activities remain fragmented across headquarters, regional, and national levels. While Headquarters provides a strong baseline through updated core policies and authoritative data products, there is no systematic approach with indicators to assess how Member States implement these policies.

5. ICAO demonstrates strong effectiveness in setting global policy and regulatory frameworks, developing and updating core guidance materials, advocating for key priorities, and providing data and statistics to support long-term planning, including through platforms such as ICAO Air Services Negotiation Event (ICAN). While ICAO's contributions are most significant at the normative and policy levels, its operational influence remains limited and uneven across regions. This underscores the need for more tailored, practical, and operational support to Member States and regional entities.

6. In 2023 and 2024, ICAO implemented all activities from the Operational Plan under the EDAT SO. However, data about the implementation of the earlier evaluation period (2020–2022) is unavailable in the Corporate Monitoring and Reporting Tool (CMRT) system, limiting a comprehensive effectiveness assessment. In addition to emerging priorities mentioned in para 3, Joint financing—one of the three ATB workstreams—is not explicitly

reflected in the Operational Plan components. Despite completing planned activities for 2023 and 2024, stakeholder feedback indicates only moderate progress toward achieving the overall EDAT SO. This could be due to the absence of a results framework and related monitoring and evaluation framework to ensure the necessary results and related activities are clearly set and measured.

7. The evaluation found that ICAO provided timely crisis-related guidance during the COVID-19 pandemic. Member States recognized ICAO's support through the provision of economic impact data and guidance on economic and financial measures. However, the absence of consistent regional follow-through limited the sustainability and equitable outreach of these efforts.

8. ICAO's tools and services, data and analytics, policy guidance, and facilitation through ICAN, demonstrate clear value when delivered in formats that are practical and user oriented. Since its establishment in 2008, ICAN has facilitated the conclusion of over 5,000 air services agreements, illustrating the significant catalytic potential of convening for platforms and applied instruments. This success highlights a strategic opportunity for ICAO to further emphasize facilitation and operational guidance, effectively bridging global policy frameworks with actionable support.

9. Member States recognize and value ICAO's neutral and authoritative role in the provision of statistics and analytics, which serve as essential inputs for evidence-based decision-making. To maintain trust and ensure continued utility, greater emphasis is needed on enhancing the timeliness, accessibility, and relevance of these products.

10. The evaluation observed that ICAO's contribution to integrating aviation into national and sectoral planning is primarily normative and policy-focused, including through resolutions, guidance materials, and awareness-raising platforms. Member States have largely led related reforms and increasingly seek practical tools and capacity-building to support implementation. This presents an opportunity for ICAO to reinforce its enabling role in helping Member States position aviation as a strategic driver of trade, tourism, sustainability, and infrastructure development.

11. ICAO advances air transport liberalization through global policy frameworks and platforms such as the ICAO Air Services Negotiation Event (ICAN), but progress is hindered by political sensitivities, voluntary uptake, uneven regional coordination, and capacity constraints. Existing tools (e.g. WASA and model clauses) remain underutilized, prompting Member States to call for stronger implementation support through training, toolkits, and technical assistance to achieve sustainable results. The evaluation also found that Joint Financing remains operationally effective in its established arrangements and reflects broader ICAO experience in administering international cost-sharing and cost-recovery mechanisms. While its role within ICAO's wider economic development portfolio remains limited, it could be modernized and selectively expanded to address broader financing needs where appropriate. Its strategic relevance would be strengthened through clearer positioning, modernization, and stronger monitoring and reporting.

12. The EDAT was found to provide a solid strategic platform; however, the impact varies depending on the alignment of services with Member State needs and the timeliness with which new priorities are operationalized. Providing a tailored support to the Member States based on their needs, accelerating the translation of Assembly

decisions into programme delivery, and pairing normative tools with sustained learning and strategic partnerships would support more consistent realization of results at the Member States level.

13. Efficiency analysis remains a challenge due to the absence of a results framework and related results-based budgeting, limiting ICAO's ability to assess performance under the EDAT SO. While ATB generates revenue through data-related activities, these proceeds are not retained by the Bureau, creating resource constraints and reducing incentives. A disconnect persists between the recognized importance of this Strategic Objective—acknowledged by two-thirds of Member States who responded to the survey—and the resources allocated for its delivery. The existing limited resources, not well aligned with divergent needs and expectations, coupled with the absence of a results framework, have contributed to ATB's capacity to plan proactively, address emerging priorities, and maintain operational resilience.

14. Achieving long-term results requires a comprehensive ICAO-wide sustainability strategy explicitly linked to the Economic Development Strategic Objective. In capacity development, shifting from standalone trainings to structured learning pathways—supported by institutional partnerships, communities of practice, and alumni networks—would strengthen post-training application and durability of impact. Yet, gaps remain in embedding sustainability by design, including the lack of integrated strategies, robust metrics, and capacity-building models that institutionalize behavior change and ensure continuity beyond individual interventions.

15. ICAO's work under the EDAT SO increasingly intersects with global priorities such as environmental sustainability and women's inclusivity. To address gender-related issues in the aviation sector, gender-disaggregated data is being collected. However, integration of these priorities remains a work in progress across regions, regulatory frameworks, and partnerships.

Recommendations

16. Aligned with the ICAO Strategic Plan 2026–2050, ATB should develop an improved integrated results framework for the Economic Development Strategic Goal, with clear outcomes and outputs, indicators, responsibilities, and related monitoring, reporting and evaluation provisions. As part of this work, ATB should clarify the role of the Joint Financing function within the broader Economic Development framework, ensure that it is appropriately reflected in planning, monitoring and reporting, and assess options to modernize and selectively expand its contribution to broader financing needs where appropriate.

17. ATB, in collaboration with CDI, and the Regional Offices, should conduct a functional review of the implementation support modalities to achieve the Economic Development Strategic Goal, assessing staffing, skillsets and workflows, and funding and resource-allocation constraints across the Headquarters and Regional Offices. Based on the review, ATB and CDI should design and implement a resourcing and delivery mechanism that clarifies implementation responsibilities and regional support arrangements and identifies feasible resourcing options to strengthen its tailored support to the Member States.

18. Aligned with the ICAO Strategic Plan 2026–2050, ATB, in collaboration with the Aviation Data and Analysis Panel, should develop a mechanism to strengthen ICAO aviation data as a strategic enabler for Member State decision-making, by improving the timeliness, accessibility, and relevance of ICAO data products, as well as by enhancing partnerships for data sharing. This could include clear corporate commitments for regular and timely

data release, equitable and predictable access to core datasets (e.g. traffic, connectivity, the Sustainable Development Goals (SDG) indicators), and closer alignment of data products with differentiated regional and national policy and planning needs.

19. In collaboration with Panels, ATB should assess, identify and develop quasi-regulatory instruments[1] (e.g., model regulations, voluntary codes, implementation scorecards) needed by Member States to strengthen the normative pull of ICAO's economic guidance in the absence of the Standards and Recommended Practices (SARPs) and introduce regular reporting or peer-review mechanisms to monitor Member State uptake, fostering transparency and peer pressure.

20. ATB should adopt a results-oriented liberalization package[2] that emphasizes practical, bilateral-level facilitation and links ICAO's normative instruments to hands-on delivery (e.g., modernize and embed economic data and negotiation tools into State decision cycles; update and expand TASA tools and model clauses; provide region-specific capacity-building etc.).

21. The above recommendations should be aligned with the outcomes of the November 2026 Air Transport Conference (ATConf/7), which is expected to provide strategic direction and guidance on economic regulation.

[1] Quasi-regulatory instruments are non-binding tools or mechanisms that resemble formal regulations but do not carry the force of law. They are designed to influence behavior, promote compliance, and strengthen normative guidance without imposing mandatory obligations. These instruments often operate in sectors where formal regulatory frameworks (SARPs) are absent or limited.

[2] A results-oriented air transport liberalization package refers to a structured set of policies, tools, and facilitation measures designed to help States progressively open their air transport markets while focusing on measurable outcomes such as improved connectivity, fair competition, and economic benefits. Unlike traditional liberalization approaches that emphasize agreements alone, a results-oriented package integrates implementation support, monitoring, and capacity-building to ensure tangible impact.

INTRODUCTION AND BACKGROUND

22. Air travel is the world's rapid transport network, essential for economic growth. Every day, close to 100,000 scheduled flights take off, carrying over 12 million passengers and a significant amount of global trade valued at $21.9 billion[3,4]. It is a major economic driver that contributes to global, regional and individual Member States economic development by facilitating trade, business, tourism, and connectivity, creating jobs, and supporting sustainable development efforts. It has a catalytic effect on other industries and the economy as a whole.

23. Historically, air transport has doubled in size approximately every 15 years, growing faster than many other industries and consistently outpacing global Gross Domestic Product (GDP) growth. This expansion was primarily driven by technological advancements, sustained investments in infrastructure, and increasing demand for both passenger and cargo air services.

24. Before the COVID-19 pandemic, the sector reached record levels in 2019. Air transport carried 4.5 billion passengers worldwide, generating 8.3 trillion revenue passenger-kilometres (RPKs). Freight also played a major role, with 58 million tonnes transported by air, amounting to 228 billion freight tonne-kilometres (FTKs). On average, more than 12 million passengers and goods worth around US$18 billion were transported daily across over 100,000 flights.

25. The economic significance of aviation was substantial. Prior to the pandemic, air transport supported 11.3 million direct jobs globally and contributed to a total of 87.7 million jobs worldwide through its wider value chain. Its direct global economic impact was estimated at US$961.3 billion, while the total global economic contribution of the sector reached approximately US$3.5 trillion[5].

26. In its early 2023 short-term forecast, ICAO predicted that most route groups would return to or exceed pre-pandemic levels by the end of 2023. While this was largely achieved, the overall recovery remained slightly below expectations, at 94% of 2019 levels, primarily due to underperformance in certain route groups, particularly those involving Asia and especially routes to and from China. ICAO forecasts that global RPK will reach 8.8 trillion (101% of 2019) in 2024, with most routes recovering or exceeding pre-pandemic levels. By 2025, ICAO projects global RPK to rise to 9.4 trillion (108% of 2019), driven by the recovery of these lagging routes, further solidifying the overall market rebound[6].

27. Looking ahead, forecasts indicated that between 2024 and 2050, global passenger traffic in RPKs was expected to grow at a compound annual rate of around 4 per cent, while air cargo traffic in FTKs was projected to expand by 3 per cent annually. At this pace, both passenger and cargo volumes were expected to more than double within the next two decades, reinforcing the sector's critical role in global economic development and connectivity[7].

28. Air transport is a crucial enabler of tourism, allowing people to travel to different countries and experience diverse cultures. Aviation connects people across borders, promoting cultural exchange and

[3] https://aviationbenefits.org/
[4] https://www.icao.int/sustainability/Documents/Informal%20Meeting%20ATC%20Presentation%20on%20ECD.pdf
[5] ICAO: 2024: Wings of Prosperity. Economic Growth Through Transport.
[6] ACI, 2025: JOINT ACI WORLD-ICAO PASSENGER TRAFFIC REPORT, TRENDS, AND OUTLOOK https://aci.aero/2025/01/28/joint-aci-world-icao-passenger-traffic-report-trends-and-outlook/
[7] ICAO: 2024: Wings of Prosperity. Economic Growth Through Transport.

understanding. It allows people to visit friends and family in different countries and participate in international events. It also facilitates business travel, enabling international meetings and conferences.

29. In line with Article 44 of the Convention on International Civil Aviation, 1944[8], the aims and objectives of ICAO are to develop the principles and techniques of international air navigation and to foster the planning and development of international air transport to ensure a safe and orderly growth of international civil aviation throughout the world. ICAO envisions a long-term liberalization of international air transport, aiming to reduce restrictions on air traffic while promoting a more open and efficient global aviation system[9]. This vision prioritizes safety, security, and ensuring fair opportunities for all stakeholders. The goal is to create a system where the benefits of air travel are accessible to a wider range of people and businesses, leading to increased economic activity.

30. Under its Economic Development of Air Transport Strategic Objective, ICAO focuses on fostering global cooperation, providing economic policies and regulatory guidance, and ensuring accurate aviation data. This includes efforts to modernize the global regulatory framework, ensure fair passenger protection, and promote more flexible ownership/control for airlines. Key initiatives also involve strengthening competition safeguards, integrating aviation into national planning, and removing regulatory barriers to market access.[10] Main priorities for ICAO today also include increased liberalization, leading to improved global connectivity for passengers and business.

31. ICAO develops and disseminates policies and guidance on issues like economic regulation, liberalization of air transport, and airport/air navigation economics. Efficient movement of people and goods by air requires effective national organization and harmonized adoption of best practices and technologies to facilitate cross-border processes. In this regard, ICAO's air transport facilitation activities involve the provision of regulatory material and guidance to ensure that national structures, facilities and technical capabilities are appropriately established and maintained, for a more seamless and efficient passenger journey.

32. The organization provides tools to enhance the transparency of the air transport regulatory framework and encourage its development, including ICAO aeronautical charges, the ICAO online Compendium of Competition Policies and Practices, and a database on the World's Air Services Agreements (WASA)[11]. ICAO facilitates States' air services negotiations through the annual ICAN and provides principles on consumer protection and policies on taxation. Since its inception in 2008, ICAN has facilitated over 5,000 air service agreements worldwide, forming the regulatory foundation that enables international air transport.[12]

33. ICAO develops an air cargo regulatory framework and guidance material on air cargo services and conducts studies on aircraft leasing and on business and general aviation services. These activities are primarily to achieve higher levels of economic productivity through diversification, technological upgrading and innovation.

34. In addition, ICAO is responsible for the collection, analysis, publication, standardization, improvement and dissemination of statistics pertaining to civil aviation. It provides data, analyses and forecasts to assess the

[8] Chicago Convention Article 44

[9] https://www.icao.int/Meetings/ICAN2017/Documents/YWang_presention_for_ICAN2017.Dec2017.pdf

[10] https://www.icao.int/sustainability/Documents/Informal%20Meeting%20ATC%20Presentation%20on%20ECD.pdf

[11] https://www.icao.int/about-icao/aviation-development/SDGFR/ED.pdf

[12] https://www.icao.int/Newsroom/Pages/Global-Aviation-Connectivity-Expands-Through-ICAN-2024-Nearly-500-Air-Transport-Agreements-Concluded-in-Malaysia.aspx

economic impact of aviation and help States make informed decisions, ensure sustainable development, improve efficiency, and mitigate risks within the global aviation sector.

35. ICAO also provides diverse types of assistance, capacity-building, and training programmes for Member States in areas like civil aviation management, aviation policy, and regulatory frameworks in line with ICAO's No Country Left Behind (NCLB) initiative. Additionally, ICAO supports human resource development through initiatives like the Aviation Training and Capacity-Building Roadmap. ICAO has also been closely working with other international bodies to provide support to Member States in implementation and capacity building and contributes to the achievements of SDG.[13]

[13] ICAO and the United Nations Sustainable Development Goals

EVALUATION PURPOSE, SCOPE & STAKEHOLDERS

Evaluation Purpose

36. This evaluation serves the dual purposes of evaluation in ICAO, i.e. accountability and learning:

- Accountability – it independently assessed the progress made over the years across key areas of ICAO's Economic Development of Air Transport Strategic Objective. In this regard, the evaluation more specifically assessed performance, strategies, implementation modalities, including partnerships with other organizations, constraints, and opportunities.
- Learning – it identified good practices and lessons learned and provide recommendations to improve performance and deliver results, as appropriate.

Evaluation Scope and Clients

37. The evaluation covered key activities and outputs in the areas of ICAO's Economic Development of Air Transport Strategic Objective delivered by ICAO from January 2020 until June 2025, such as Connectivity, Competition, Emergency Response Planning, Infrastructure Management, Aviation Data, Joint Financing and monitoring of the economic impact of COVID 19. The primary clients of the evaluation are ATB, OSG, CDI, ROs, the ICAO Council and Member States. Other stakeholders, such as the industry and ICAO partners, would use, as appropriate, the evaluation findings and lessons learnt.

Evaluation Criteria and Questions

38. The evaluation was guided by the OECD Development Assistance Committee (DAC) criteria of relevance, coherence, effectiveness, efficiency, and sustainability. In formulating the final evaluation questions (EQ), the evaluation team considered the availability and reliability of data as well as the ease of data collection to ensure the responses would be credible.

METHODOLOGY

Data Collection

39. The evaluation used a mixed-methods approach combining various quantitative and qualitative data sources. These include:

    a. Desk review and secondary data: The desk review included an analysis of policies, guidance materials, manuals, C-WPs, ATB, and Regional Operating Plans, projects and monitoring reports, ICAO Business Plans, Global Plans, Member States' implementation plans, and other documents. In addition, the evaluation team collected and reviewed statistical data and information from ICAO websites and other sources.

    b. Interviews with stakeholders: The evaluation team undertook group and/or individual discussions with:

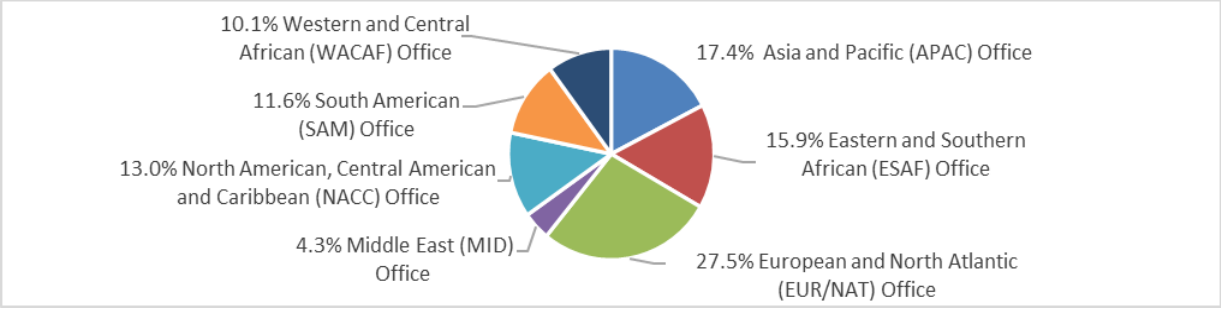
    - ICAO Council President and Members including Members of the Committee on Air Transport and the chairperson of the Joint Support Committee (JSC)
    - Secretary General
    - ICAO HQ and RO managements and staff
    - DGCA and experts of Member States
    - Partner/stakeholder representatives
    - Other relevant stakeholders

    c. Online survey: The evaluation team launched an online survey utilizing a largely quantitative approach to complement the primarily qualitative interviews, targeting all Member States to gather their feedback.

40. The selected methodological approach helped triangulate findings and provide a holistic understanding of ICAO's effectiveness in meeting its economic development objectives and plans over the past five years, as well as an understanding of the needs and expectations of Member States for the future.

41. The evaluation reached 69 Member States and administrations (see Figure 2) across all regions through the online survey and interviews, either in person in Montreal or remotely, while all Member States were invited by State letters to participate in the evaluation through an online survey[14].

Figure 1: Stakeholder consultations – regional breakdown



[14] Out of the 117 survey responses, 46 were partial and could not be used due to the scarcity of data provided. 71 could be used, with some countries responding more than once due to overlapping jurisdictions.

Data Analysis and Quality Assurance

42. A range of qualitative and quantitative techniques was used to analyze and triangulate the data collected throughout the assessment, including the following methods:

    - Descriptive analysis was utilized to examine the online survey responses and other relevant data derived from the desk reviews. Quantitative data are presented in graphs and tables as applicable.
    - Content analysis was employed to assess qualitative information gathered from the desk review and key informant interviews in order to identify major themes. Qualitative data are quantified as much as possible, with processes, trends, or clusters illustrated using infographics.

43. Using triangulation, the information collected from both primary and secondary sources was systematically analyzed and cross-referenced to reach findings. Similar questions were posed to stakeholders to compare responses, verify information, and identify lessons learned.

44. To ensure transparency, analytical clarity, and methodological rigor, the evaluation used a Key Findings–Conclusions–Recommendations Matrix as a central tool for presenting results. This matrix systematically maps the key findings to the corresponding conclusions and recommendations, thereby demonstrating a coherent and logical progression from evidence to judgment to action. This approach mitigates potential bias, enhances transparency, and strengthens the overall credibility of the evaluation.

Ethical Considerations

45. The evaluation abided by the United Nations Evaluation Group (UNEG) Ethical Guidelines for Evaluation.[15] Special care was given to the storage of documents, notes from the interviews, and the confidentiality of the data collected for this evaluation. The identity of evaluation participants was preserved by reporting aggregate-level results only. All participants were briefed about the purpose of the evaluation, data use, the confidentiality of the information, and their right not to respond to a specific question or to withdraw at any moment from the evaluation process.

46. This evaluation was independently carried out by OIO, with the assistance of an independent consultant. There was no conflict of interest from any evaluation team member in this engagement.

[15] http://www.unevaluation.org/document/detail/102

FINDINGS

47. This section presents the main evaluation findings focusing on the relevance, coherence, effectiveness, efficiency, sustainability, and cross-cutting issues like gender and environment. Results are disaggregated by ICAO region, where specific patterns emerge.

Relevance

Finding 1: Overall relevance is confirmed but unevenly perceived. ICAO's Economic Development Strategic Objective is broadly regarded as relevant, averaging 63.1% in survey ratings, with the highest scores for capacity-building, data, and statistics. Industrialized economies mainly request tailored analytics, facilitation, and pragmatic bilateral support, while developing economies emphasize connectivity, financing, and capacity-building, underscoring divergent expectations across regions. ICAN was unanimously lauded by the interviewed Representatives across ICAO Member States.

48. ICAO's work on the Economic Development of Air Transport Strategic Objective, including policies and guidelines, is widely acknowledged as relevant and strategically important, particularly in supporting long-term aviation outcomes such as market growth, affordability, and carbon neutrality. Stakeholders view economic development not only as a goal in itself but also as a key driver for ICAO's broader objectives, including safety, security, and environmental sustainability. However, some of ICAO's legacy tools related to the Economic Development area remain rooted in outdated, state-controlled models from the 1940s, which limit their applicability in today's context of privatization, modern financing, and liberalized markets. Their greater alignment with the ICAO Strategic Plan 2026-2050 would enhance the relevance and responsiveness of these tools.

49. While data is considered as foundational for effective policy making, its value depends on its timeliness, granularity, accuracy and visibility. When datasets are outdated or aggregated without sufficient details and breakdowns, they diminish the utility of policies and hinder informed decision-making. Stakeholder perspectives underscore the need for tool modernization, data-driven approaches, and context-sensitive economic policies to ensure ICAO's continued leadership in global aviation development. The next paragraphs provide insights into varying stakeholder perspectives.

50. Survey data confirms that ICAO's Economic Development Strategic Objective is widely regarded as relevant, but expectations differ sharply across regions and thematic areas. About 63% of Member States rated the Strategic Objective as relevant. The moderate relevance is also reflected in previous evaluative evidence[16].

51. A clear pattern emerges across stakeholders' narratives. Industrialized economies tend to prioritize tailored, high-resolution analytics and facilitation mechanisms, favoring economic development guidance that complements their mature domestic and regional frameworks rather than imposing generic models. Their relevance judgments hinge on the timeliness and the specificity of data, as well as on pragmatic bilateral

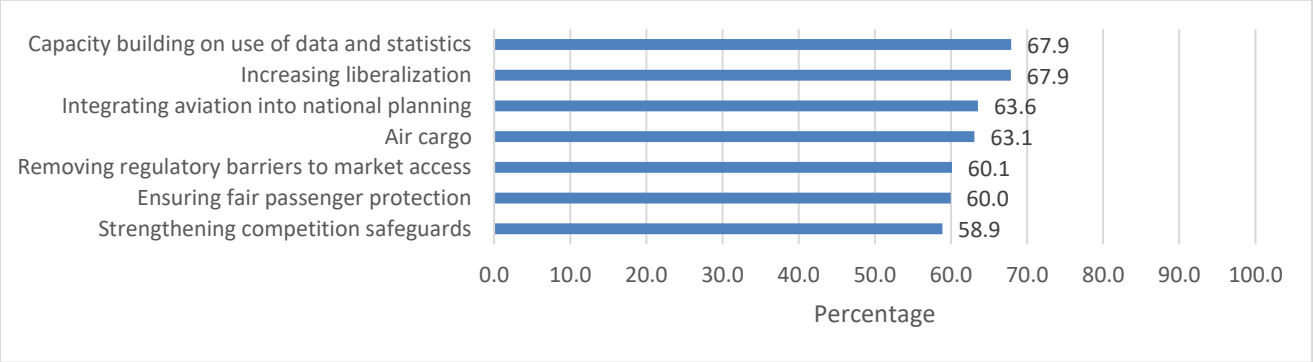
[16] ICAO, 2023: Assessment of Member States' Needs and Expectations. The report states on page 7 that: ICAO Strategic Objectives are assessed to be relevant to meet State needs, with stakeholders considering Safety and Environmental Protection as the most relevant objectives. However, States perceive Economic Development of Air Transport and Environmental Protection as less clear and more difficult to achieve and implement.

facilitation. In contrast, developing economies emphasize the importance of connectivity, financing, and capacity-building. They value ICAO's neutral platform and its policies supporting liberalization and negotiations while looking for practical implementation tools, training programmes, and investment-enabling instruments to support airport/ANSP modernization and to integrate aviation into broader national development plans. One important theme is the distribution of investments associated with achieving the Long-Term Aspirational Goal (LTAG) for 2050, with developing countries flagged as bearing a disproportionate share of the burden, reinforcing the need for country-level analytics and financing solutions. The value of ICAN was unanimously lauded by interviewed Representatives across ICAO Member States.

"ICAN is such a very important event for our small country. It helped save money and so much travel. The last event was used to sign up to five agreements at the time. It has the highest relevance for our civil aviation authority. Agreements …[three more countries] are to be signed later this year. Now ICAN should also take place in Africa". Member State from WACAF region.	"ICAN is a very useful yearly event. We can get a lot of work done there in one shot, hundreds or thousands of agreements were done through ICAN, since 2009. In our case, for example, we achieved 15 country agreements in one week, all within a single trip. This could not be done otherwise. So much happens in the hallways during ICAN, and this could not be replaced by video conference only. Invaluable relationships are forged that way". Member State from NACC region.

52. Figure 2 presents the survey results across all seven sub-criteria, highlighting the perceived relevance of the economic development Strategic Objective. Capacity-building on aviation data, statistics, and liberalization emerges as most relevant, with 67.9% of Member States rating it highly. Integrating aviation into national planning (63.6%) and air cargo development (63.1%) follow closely, indicating moderately high relevance. Slightly lower, though still significant, are passenger protection (60.0%) and removing regulatory barriers to market access (60.1%). At the lower end, strengthening competition safeguards (58.9%) records moderate relevance, reflecting more limited demand compared to other priorities.

Figure 2: Relevance of economic development aspects (n=89)

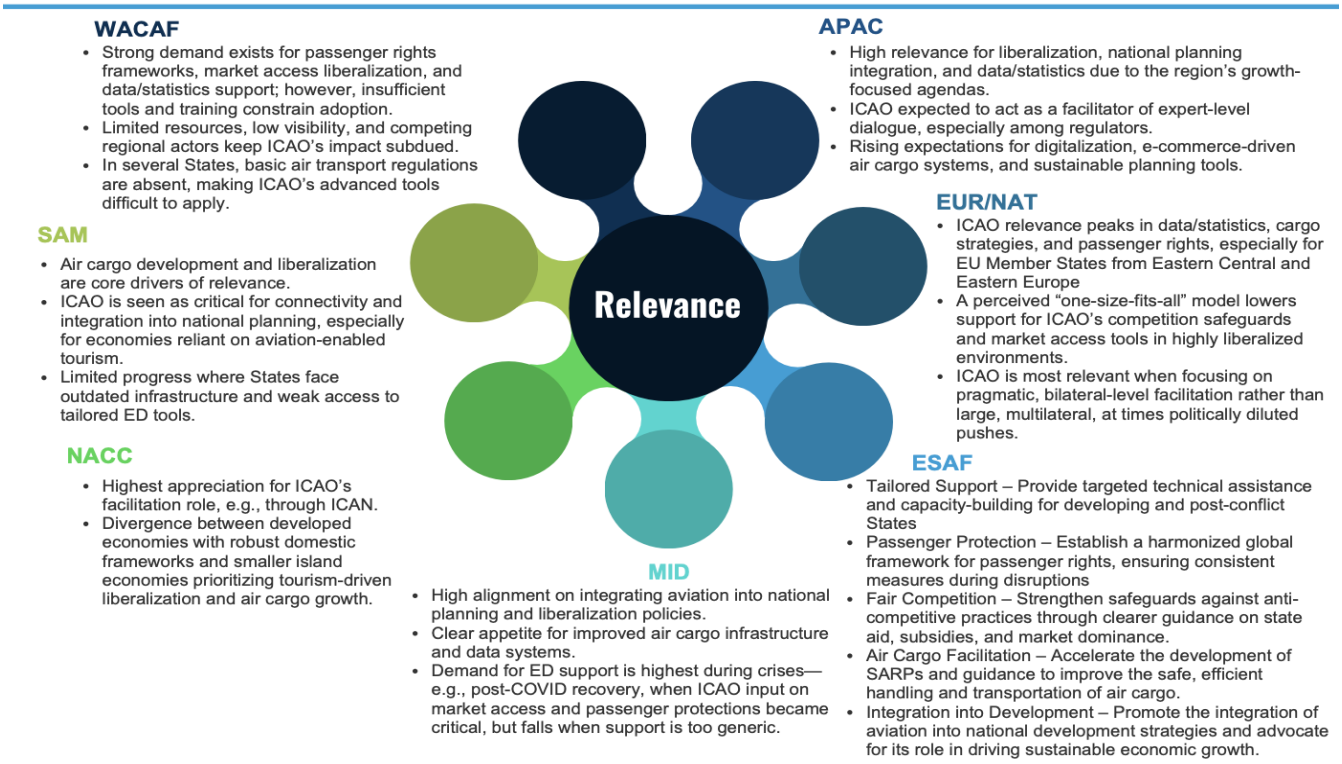


53. ICAO's economic development work is perceived most relevant in the Asia and Pacific Region (APAC) (67.9%), the Middle East Region (MID) (67.2%), the South American Region (SAM) (66.7%), and the North American, Central American and Caribbean Region (NACC) (65.9%), followed by the (Eastern and Southern African Region) ESAF (65.2%). Relevance is lower in the European and North Atlantic Region (EUR/NAT) (58.1%) and lowest in the Western and Central African Region (WACAF) (52.1%), according to the Member States participating in the online evaluation survey. The variation correlates strongly with Member States'

narratives: relevance rises where ICAO supports States with timely data, negotiates liberalized agreements, facilitates connectivity, and aligns the economic development Strategic Objective with national planning. It declines where tools are perceived as outdated, visibility is low, or regional institutions assume leading roles.

54. Figure 3. summarizes the relevance of ICAO's Economic Development Strategic Objective for each region, with emerging key thematic patterns.

Figure 3: Infographic with regional views of relevance



55. The relevance of joint financing work within ICAO's Economic Development Strategic Objective appears to be limited in scope, as the mechanism currently reflects a long-standing arrangement and has not been widely applied for broader aviation financing needs. Over the past six years, ICAO has not updated or expanded its joint financing mechanism to address broader and more pressing economic development challenges, particularly the financing gaps for infrastructure modernization and decarbonization in developing regions. The Danish and Icelandic Joint Financing Agreements remain a long-standing cost-sharing mechanism for certain North Atlantic air navigation services. At present, 25 States are parties to the Agreements. Most costs are recovered from users, while the residual share not allocable to international civil aviation is borne by the States parties under the agreed formula. Although the function is financed predominantly through cost-recovery arrangements, some regular-budget-funded leadership and support functions also contribute. However, the limited application of these arrangements highlights missed opportunities to adapt Joint Financing more strategically to emerging needs.

56. The Bureau highlighted the evolution and continued relevance of the Joint Financing Agreements and the value of the JSC in keeping ICAO informed of operational challenges in a high-traffic region. It also acknowledged the potential to apply joint financing concepts more broadly, while noting that resource

constraints and competing economic development priorities have limited progress. While the current arrangements work well in their original context, the strategy is implemented narrowly despite its potential to address emerging needs, including in ESAF, WACAF and other regions. Accordingly, the evaluation recommends more proactive identification of needs, strong coordination and support to Member States in applying joint financing to a wider set of air transport economic development priorities, building on good practices already in place. Notably, joint financing is not explicitly integrated into ICAO's Operational Plan (see section 5.3.8), indicating that it is institutionally sidelined rather than actively leveraged for broader economic development purposes. Although projects such as homogeneous air traffic areas, major traffic routes, and ground aid calibration have been recognized as promising candidates for joint financing—particularly in regions like Africa and the Indian Ocean, where regional collaboration is vital for cost-effective service delivery—no concrete implementation has taken place to date[17]. Member States outside the North Atlantic rarely reference joint financing. This reveals a disconnect between ICAO's proven but static financing model and the dynamic, region-specific needs of its members. Without substantive reform and expansion, joint financing will continue to play only a marginal role in advancing ICAO's economic development objectives, serving more as an institutional legacy than as a strategically relevant tool.

Responsiveness to Assembly Resolutions

Finding 2: ICAO's Assembly Resolutions provide a comprehensive policy backbone for economic development in air transport, addressing key areas such as liberalization, sustainability, infrastructure, and global cooperation. However, newer priorities such as taxation introduced in 2022 (A41-27) have yet to be incorporated and are yet to be reflected into the Operating Plan of the Economic Development of Air Transport of ICAO.

57. ICAO's Assembly Resolutions provide a comprehensive policy backbone for economic development in air transport, but newer priorities such as taxation and consumer protection introduced in 2022 (A41-27) have yet to be reflected in the latest Operating Plan of the Economic Development team, highlighting a short-term gap between policy evolution and operational implementation. Figure 4 summarizes the linkages of ICAO's work on economic development and the respective Assembly Resolutions.

Figure 4: ICAO Assembly resolutions (2020 – 2025) and their linkages to economic development

Resolution	Title (short)	Linkage to Economic Development of Air Transport
A41-27	Consolidated statement of continuing ICAO policies in the air transport field	Core economic framework: market access & liberalization, fair competition, consumer protection, statistics/forecasting, airport & ANS charges, taxation—directly shaping the cost and regulatory environment for air transport growth.
A41-24	Aviation's contribution towards the UN 2030 Agenda for Sustainable Development	Integrates aviation into national development planning and SDG strategies; strengthens aviation's role as an enabler of trade, tourism, and connectivity.
A41-17	Consolidated statement of continuing ICAO policies related to facilitation	Supports efficient passenger/cargo flows through streamlined border controls, health/security processes, accessibility—reducing transaction costs and enabling seamless connectivity.
A41-22	CORSIA	Creates a global market-based measure to stabilize emissions growth; affects airline operating costs and incentives for sustainable fuel/offset markets.
Upcoming (A42, 2025)	Proposed update to A41-27 (under discussion)	Potential new guidance on taxation, charges, and economic policies for recovery and resilience—outcome to be seen once Assembly concludes (late Sept–Oct 2025).

[17] Possible Use of Joint Financing Concept

58. ICAO's work on the economic development of air transport is anchored in the Assembly's resolutions, which set global policy directions for States and industry. The Consolidated Statement on Air Transport Policies (A41-27) is the backbone: it codifies principles on market access, fair competition, consumer protection, data and forecasting, and the economic oversight of airports and air navigation services. These elements ensure that the global air transport system grows in a liberalized, efficient, and financially sustainable way.

59. Complementing this, the facilitation resolution (A41-17) emphasizes streamlined border and passenger processes. By reducing barriers to movement and improving connectivity, it strengthens the economic contribution of air transport to trade and tourism. Likewise, A41-24 explicitly connects aviation to the UN 2030 Agenda for Sustainable Development, urging States to integrate air transport into their national economic and development strategies.

60. Environmental resolutions—A41-20, A41-21, and A41-22—while primarily addressing environmental sustainability, have major economic implications. The global long-term aspirational goal of net-zero emissions by 2050, and the continuation of CORSIA, set predictable policy frameworks that shape investment, operating costs, and financing in the sector. This alignment of environmental and economic objectives underscores ICAO's role in ensuring sustainable growth.

61. Together, these resolutions illustrate how ICAO balances liberalization, efficiency, sustainability, and facilitation to enhance the economic resilience and development potential of international air transport. The 42nd Assembly (2025) has further refined these policies, particularly in taxation and cost-related charging, reflecting evolving post-pandemic and climate-related challenges. ICAO's Assembly Resolutions, particularly A41-27 adopted in 2022, have refined and updated the scope of economic policy to include emerging issues such as taxation, consumer protection, and competition safeguards. These themes reflect the evolving pressures on States and industry in the post-COVID and sustainability era. However, the Operating Plan and its activities for 2025 do not yet include work on (taxation and related economic measures[18]). ATB informed the evaluation team that although the 2025 Operating Plan does not explicitly include additional activities on taxation, work in this area continued throughout the year. This included collaboration with the UN Committee of Experts on International Cooperation in Tax Matters on the proposed amendment to Article 8 of the UN Model Double Taxation Convention, issuance of State Letter EC2/10-25/1 in January 2025, updates to the compendium on States' consumer protection regulations, and contributions to incorporating ICAO Core Principles into the ICAO Template Air Services Agreements (TASA).

62. ICAO's work under this strategic objective also directly supports the implementation of Assembly Resolution A38-14, which outlines the Consolidated statement of continuing ICAO policies in the air

[18] A41-17 — *Consolidated statement of continuing ICAO policies related to facilitation* (adopted 7 October 2022).
A41-20 — *Consolidated statement of continuing ICAO policies and practices related to environmental protection – General provisions, noise and local air quality* (adopted 7 October 2022).
A41-21 — *Consolidated statement of continuing ICAO policies and practices related to environmental protection – Climate change* (adopted 7 October 2022).
A41-22 — *Consolidated statement of continuing ICAO policies and practices related to environmental protection – Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA)* (adopted 7 October 2022).
A41-24 — *Aviation's contribution towards the United Nations 2030 Agenda for Sustainable Development* (adopted 7 October 2022).
A41-27 — *Consolidated statement of continuing ICAO policies in the air transport field* (adopted 7 October 2022)

transport field." In response, ICAO developed a long-term vision for international air transport liberalization and a set of core principles on consumer protection, disseminated to Member States for feedback and integration into national practices.

Relevance and responsiveness to the sustainable recovery post COVID-19

Finding 3: ICAO has used the EDAT SO to guide efforts in post-COVID-19 aviation recovery, emphasizing the role of air transport in economic revitalization. This includes provision of data, policy guidance, and financial tools to help States address infrastructure and airspace capacity constraints, in line with Assembly priorities. Member States appreciated, for example, ATB's role in providing data to monitor the economic impact of COVID-19 and the Guidance on Economic and Financial Measures provided. Yet sustainable recovery efforts have lacked consistent regional tailoring and implementation tools, with capacity-building needs most acute in Africa and South America.

63. ICAO played a central role in guiding Member States through the post-COVID-19 aviation recovery, with a particular emphasis on the sector's contribution to economic revitalization. These included the provision of data, policy guidance, and financial tools to help States address infrastructure and airspace capacity constraints. ICAO has taken significant steps to support post-COVID-19 aviation recovery through the provision of data to help States revitalize their economies and address infrastructure and airspace capacity constraints. One of the major works of ICAO in this regard is the enhancement of ICAO's data platforms, such as the Monthly Monitor and the Civil Aviation Data Solutions (iCADS), which deliver real-time analytics on passenger and cargo traffic, aircraft operations, and route forecasts. These resources enable States to benchmark recovery progress and inform strategic planning. Furthermore, ICAO developed post-pandemic forecast scenarios (low, mid, and high) extending to 2050, endorsed by the Aviation Data and Analysis Panel to support long-term planning.

64. In addition, ICAO's Aviation Infrastructure Gap Analysis (2023) identified over 60 critical infrastructure deficiencies across 41 Member States[19]. These efforts are aligned with ICAO's Global Implementation Roadmap and Assembly priorities, ensuring that data-driven decision-making supports sustainable recovery and economic revitalization across the aviation sector. ICAO has also updated its Guidance on Economic and Financial Measures to Mitigate the Impact of the Corona Outbreak, which includes cost recovery policies, infrastructure funding mechanisms and support for unmanned aircraft systems and advanced air mobility (AAM). The evaluation identified a wide range of ICAO documents related to COVID-19 and the management of Air Transportation during the crisis[20].

[19] Aviation Infrastructure Gap Analysis (2023) Final Report 20082024.docx

[20] ICAO. *Manual on COVID-19 Cross-Border Risk Management (Doc 10152), Third Edition*. Montréal: ICAO; 2021.
ICAO. *Testing and Cross-Border Risk Management Measures Manual (Doc 10152), Second Edition (Advance Unedited)*. Montréal: ICAO; 2021.
ICAO. *Council Aviation Recovery Task Force (CART) Report: Guidance for Air Travel through the COVID-19 Public Health Crisis*, Fourth Edition, August 2021. Montréal: ICAO; 2021.
ICAO. *Updated List of Key Principles and Recommendations of the ICAO Council Aviation Recovery Task Force (CART)*. Montréal: ICAO; 5 October 2021.
ICAO. *Public Health Safety and Related Facilitation Measures – Review and updates of Doc 10152: Manual on COVID-19 Cross-Border Risk Management*. Montréal: ICAO; October 2021.
ICAO. *Global Implementation Roadmap of the Recommendations and Guidance of the Council Aviation Recovery Task Force (CART)*. Montréal: ICAO; [Date],
ICAO. *High-Level Cover Document for the CART Phase II*. Montréal: ICAO; 2020.

65. Overall, ICAO's COVID-19 response demonstrated its global relevance, but the sustainable recovery has highlighted a continuing gap between high-level policy guidance and localized, capacity-building support, especially in Africa and parts of South America.

66. Stakeholder feedback confirms that ICAO responded rapidly during the pandemic, issuing State Letters, adjusting regulatory frameworks, and facilitating bilateral agreements through ICAN platforms, which supported network reopening and trade resumption. CAPCSA programs and COVID-specific guidance were especially relevant for traffic monitoring, license renewal delays, and air cargo facilitation, helping member states maintain operational continuity.

67. However, the effectiveness of ICAO's interventions diminished after the immediate crisis had passed. Many stakeholders reported that ICAO's recovery initiatives lacked sustained follow-up, regional adaptation, and implementation tools. While frameworks for passenger protection, liberalization, and market access were introduced, adoption varied significantly across regions. APAC and EUR/NAT advanced quickly due to stronger regulatory capacities and digitalization, whereas ESAF and WACAF lagged because of infrastructure gaps and limited technical assistance.

68. Survey data further indicated the need for ICAO to improve integration of economic recovery measures into national planning, enhance passenger rights frameworks, and provide tailored capacity-building for smaller and developing states. Member states called for harmonized guidelines on market liberalization, digitalization of passenger services, and improved ICAO-regional coordination to avoid duplication and delays.

Coherence

Alignment with ICAO Programmes

Finding 4: ICAO's EDAT policies and initiatives complement the organization's broader strategic objectives, including safety, security, air navigation, and environmental sustainability. EDAT programmes also advance the EDAT SO by providing models, data, and principles to help Member States manage liberalization, consumer protection, infrastructure, and cargo policy. However, gaps remain in ambition and enforceability due to the absence of SARPs.

69. Overall, ICAO's EDAT policies and initiatives are designed to complement and support the organization's broader strategic objectives, including safety, security, air navigation, and environmental sustainability. For example, EDAT contributes to safety by promoting sound governance and infrastructure investment, which are essential for safe operations. It supports security through economic resilience and regulatory frameworks that enable secure air transport systems, aligning with ICAO's Global Aviation Security Plan and Cybersecurity Action Plan. In air navigation, EDAT addresses infrastructure and airspace capacity constraints by encouraging airport expansion and modernization, ensuring that economic planning aligns with technical upgrades. Environmentally, EDAT facilitates sustainable aviation growth by advocating for innovative financing mechanisms and public-private partnerships that support ICAO's goal of net-zero carbon emissions by 2050.

70. ICAO has also built a structured set of programmes that align with its Economic Development of Air Transport Strategic Objective[21]. Through the Template Air Services Agreements (TASA), States receive

[21] ICAO. *Template Air Services Agreements (TASA) and Related Liberalization Tools*. Montréal:

standardized clauses to modernize bilateral or plurilateral agreements, directly supporting liberalization and fair competition. The Core Principles on Consumer Protection and accompanying surveys provide a framework for passenger rights, while the Airport Economics Manual (Doc 9562) and Policies on Charges (Doc 9082) guide States on cost recovery and infrastructure efficiency. The Economic Analyses and Forecasting programme, alongside flagship outputs like the Aviation Benefits Report, positions ICAO as a provider of data and narratives linking aviation to GDP, jobs, and connectivity. Likewise, its Air Cargo Economic Policy hub underlines the sector's role in trade facilitation, and CART guidance during COVID-19 reinforced aviation's contribution to recovery and economic resilience.

71. However, when compared with the specific demands voiced in the primary data collection during this evaluation, several gaps emerge, which are further elaborated in section 6. While ICAO offers TASA and related liberalization tools, States called for a fully modernized, globally harmonized ASA framework that would go further—covering interlining, wet leasing, and even creating enforcement or incentive mechanisms, rather than relying on voluntary uptake. In consumer protection, ICAO's non-binding Core Principles fall short of the raw demand for binding SARPs or even a new Annex that would set enforceable passenger rights, including compensation standards and digital rights. This is primarily attributable to the Chicago Convention, which is founded on the principle of State sovereignty over international air services. Articles 5 and 6 affirm that States retain full discretion over scheduled operations. The Convention therefore provides no legal basis for obliging States to adopt liberalized air services arrangements or binding consumer protection standards. Meeting such expectations would require either amending the Convention or establishing a new global agreement.

72. On cargo, ICAO's policy hub does not yet translate into the global green cargo corridors, digital cargo roadmaps, or cargo-focused economic facilities that States identified as urgent priorities. Similarly, while ICAO publishes benefits reports and SDG-linked indicators, it has not delivered a National Aviation Contribution Index (NACI) or uniform state-level dashboards that measure aviation's contribution to GDP and employment across all States.

73. ICAO's economic work acknowledges new technologies but has not yet embedded Advanced Air Mobility, drones, AI, or cybersecurity into its economic development frameworks in the way that States proposed, linking them explicitly to prosperity, capacity building, and future markets rather than only to safety or environmental tracks. Hence, an opportunity emerges to mainstream economic development aspects into new initiatives addressing those emerging issues. ATRP/18 reviewed the rapid growth of international UAS operations and agreed to monitor their evolution before considering economic regulation, taking a cautious, evidence-based approach. Apart from this, AEP-ANSEP confirmed that existing airport and ANS

ICAO. *Core Principles on Consumer Protection*. Endorsed by the ICAO Assembly. Montréal:
ICAO. *Survey on Assistance to Passengers*. Montréal:
ICAO. *Policies on Charges for Airports and Air Navigation Services (Doc 9082)*, Ninth Edition. Montréal: ICAO; 2012.
ICAO. *Airport Economics Manual (Doc 9562)*, Third Edition. Montréal: ICAO; 2013.
ICAO. *Economic Analyses and Forecasting Programme*. Montréal: ICAO; ongoing.
ICAO. *Aviation Benefits Report*. Montréal: ICAO; published jointly with IATA, ACI, CANSO;
ICAO. *Air Cargo Liberalization and Air Cargo Economic Policy*. Montréal: ICAO; ongoing.
ICAO. *Council Aviation Recovery Task Force (CART) Reports*. Montréal: ICAO; 2020–2021
ICAO. *Implementation and Resolutions of the Economic Development of Air Transport Objective*. Montréal: ICAO; Assembly working papers and resolutions.
ICAO. *EUR/NAT Air Transport Policy and Regulation Programme*. Paris: ICAO EUR/NAT Office; ongoing.
ICAO. *Wings of Prosperity: Aviation and the Global Economy*. Montréal: ICAO; 2020.

cost-recovery principles apply to new entrants such as UAS and AAM, though implementation remains subject to bilateral agreement.

Finding 5: ICAO's economic development work is strategically important but remains siloed across bureaux. Less current or commercially restricted datasets, excessive survey, and limited stakeholder feedback loops affect coherence, undermining the usefulness and credibility of ICAO's economic data. Limited cross-agency engagement (e.g., on taxation, labor, and sustainability) and insufficient regional customization (e.g., EU competition frameworks, African Union liberalization plans) result in inconsistent policy messages and diluted impact.

74. The credibility and coherence of ICAO's economic data are undermined by outdated or commercialized datasets, excessive surveys, and limited stakeholder engagement. Additionally, weak external alignment—such as minimal cross-agency collaboration (e.g., on taxation, labor, and sustainability) and insufficient regional customization (e.g., EU competition frameworks, African Union liberalization plans)—dilutes policy impact and leads to inconsistent messaging across Member States.

75. At the headquarters level, coordination between ATB and The Air Navigation Bureau (ANB) has improved in areas like workforce planning and shared data systems, yet "silo" issues remain, producing inconsistent messages to Member States. Economic statistics are integrated into Council reporting, but economic development data are slower to process, sometimes commercialized[22] and therefore less accessible, or outdated[23]—undermining coherence.

76. Regional patterns captured in the evaluation survey reveal where coherence is stronger or weaker:

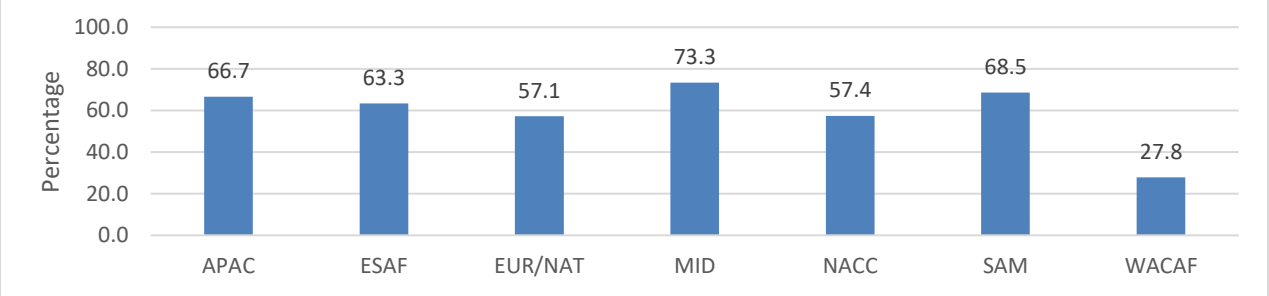
- APAC: Stakeholders note that economic development receives less attention than safety/security. Transparency issues with paid data platforms weaken trust, and excessive ICAO surveys dilute efficiency and coherence.
- EUR/NAT: While global economic development templates are coherent in concept, they need regional customization (e.g., alignment with EU competition frameworks or African Union liberalization plans). Some states judge economic policy outputs as too convention-focused and not integrated with real market performance data.
- ESAF & WACAF: Economic development is not mainstreamed alongside safety and security, and advocacy is perceived as less coherent than regional actors like the African Civil Aviation Commission (AFCAC) or the Airports Council International (ACI). Limited follow-up and weak integration into national planning further reduce policy coherence.
- MID: Engagement is fragmented, with ICAO sometimes reacting to regional bodies like the Arab Civil Aviation Organization (ACAO) rather than leading. States stress that progress in one country depends on coordinated capacity-building across the region.
- SAM: Economic development activities are often stand-alone without links to trade or tourism strategies. For example, one Member State points to a disconnect between ICAO's liberalization advocacy and weak national follow-through, limiting coherence.

[22] Based on the feedback of nine Member States covering five regions
[23] Based on feedback from five regions

- NACC: There is some Secretariat coordination between data and regulatory work, but economic development streams remain siloed from facilitation and safety. Concerns persist over inconsistent approaches to competition safeguards.

77. About 62.4% of Member States believe that ICAO's economic development standards/policies, programmes and initiatives/projects are aligned with other ICAO's standards/policies, programmes and projects/initiatives. Important regional variations are presented in Figure 5[6].

Figure 5: Alignment of ICAO's economic development standards/policies, programmes and initiatives/projects with other ICAO's standards/policies, programmes and projects/initiatives (n=82)



78. Recent ICAO surveys to Member States on liberalization, market access barriers, charges policies, and passenger protection reveal a clear global trend toward gradual liberalization and harmonized economic frameworks but highlight persistent implementation gaps and regional disparities. Overall, these surveys reflect steady policy alignment with ICAO's vision but underscore the need for stronger leadership, updated tools, and targeted capacity-building to accelerate liberalization, harmonize frameworks, and enhance consumer protection, as summarized in the following box.

The Survey on Liberalization of International Air Transport (2019) shows strong state alignment with ICAO's long-term vision, with 98% of respondents aware and 94% applying it in policymaking. Most favor gradual, flexible liberalization, prioritizing supplemental agreements over comprehensive multilateral treaties. Cargo policies are significantly more liberal than passenger markets, with 71% of states offering wider traffic rights and preferring supplemental cargo frameworks. However, concerns remain over fair competition, environmental safeguards, and ownership restrictions.

The Report on Barriers to Market Access (2025) finds that 77% of states still face significant regulatory constraints, mainly around traffic rights, capacity limits, foreign ownership, and code-sharing rules. While 62% of states urge ICAO to play a stronger leadership role by promoting model agreements and updated guidance, only 41% report actively using ICAO templates today. Regional frameworks, such as ASEAN and SAATM, are seen as useful but underutilized.

The Survey on States' Implementation of ICAO's Policies on Charges (2020) demonstrates high awareness and adoption of Doc 9082, with 100% of states familiar and 84% applying its principles in airport decision-making. Over 85% integrate ICAO's cost-relatedness, transparency, and non-discrimination principles into national law and air services agreements, showing strong alignment between ICAO standards and domestic regulatory frameworks. However, partial implementation persists in some states due to local legal conflicts and resource constraints.

Finally, the Survey on ICAO Assistance to Passengers & Consumer Protection (2020) highlights growing application of ICAO's core principles, with 80% of states adopting them and 85% finding them useful for shaping national laws. Yet, regulatory gaps remain: only 23% of states define "massive disruption" in law, and 56% allow airlines exemptions under force majeure. While 70% have contingency plans, states call for more tailored guidance on disruption management and special

Alignment with SDGs

79. ICAO's Economic Development of Air Transport Strategic Objective is explicitly designed to support the UN SDGs. ICAO's Assembly Resolution A41-24 recognizes aviation's contribution to the 2030 Agenda and calls for international solidarity and partnerships to promote sustainable, inclusive, and resilient economic recovery in civil aviation. ICAO's policies and regulatory guidance foster market liberalization, fair competition, and consumer protection, driving economic growth and employment.

80. A recent ICAO high-level review (ICAO, 2023)[24] found that ICAO positions aviation as a key enabler of sustainable economic growth, trade, and connectivity, and has linked this role to several Sustainable Development Goals. Its activities include advocacy through global forums and reports that highlight aviation's socio-economic benefits, and the development of guidance such as National Aviation Planning Frameworks and Civil Aviation Master Plans to help States integrate aviation into their national development strategies. ICAO also acts as custodian of SDG indicator 9.1.2, monitoring passenger and freight volumes to support infrastructure planning and investment decisions. Special initiatives, including No Country Left Behind and targeted support for vulnerable States, aim to ensure that small and less connected economies can leverage aviation for economic resilience.

Effectiveness

Finding 6: ICAO's Economic Development Strategic Objective lacks a clear results framework, defined outcome and output indicators, and a related monitoring and evaluation (M&E) framework to track progress on the Strategic Objective. While operational activities are being implemented, this approach is insufficient for such a critical area.

81. ICAO's Economic Development Strategic Objective currently lacks a coherent results framework that would clearly articulate how its activities contribute to intended results, as well as defined outcome and output indicators to measure progress in a systematic manner. The absence of a monitoring and evaluation framework further limits the Organization's ability to plan, monitor, evaluate and adjust interventions to ensure that the Strategic Objective is being advanced effectively over time. Although operational activities under this objective are being fully implemented, they tend to function in isolation rather than as part of an integrated results and resources framework.

82. Moreover, the evaluation found that results-based management principles are not sufficiently embedded in the monitoring and reporting of ICAO's economic development work. Current reporting practices focus primarily on activities rather than results, with the Corporate Planning, Monitoring and Reporting (CPMR) tool marking tasks as "achieved" or "not achieved" without capturing outcomes or impacts. Although the CPMR has been useful for identifying key activities, it does not allow for detailed or meaningful reporting on the achievement of results[25]., limiting ICAO's ability to assess progress toward its strategic objective and resulting in a fragmented picture across HQ, regional, and national levels.

83. At HQ level, ICAO maintains a strong baseline by keeping core policies updated and producing authoritative data products. These are valuable inputs for Council deliberations and technical panels. However, ICAO lacks a robust implementation model to track how states apply these policies. Monitoring is heavily dependent on voluntary state reporting, while delays in releasing datasets reduce their usefulness.

[24] ICAO, 2023: High-Level Review of ICAO's Contribution to the Sustainable Development Goals (SDGs)
[25] Evaluation of the Regional Portfolio of ESAF and the AFI SECFAL Plan

The absence of systematic performance tracking beyond initial adoption means effectiveness often stops at the point of policy issuance, with a lack of indicators to assess the implementation/usefulness of the various policy documents and guidelines.

84. At the regional level, effectiveness is uneven. The APAC office demonstrates how workshops and technical assistance can feed directly into regional liberalization agendas, notably within ASEAN. Similarly, during the COVID-19 crisis, the MID office showed the value of timely traffic monitoring and state guidance. Yet in other regions, such as South America and Africa, systematic performance monitoring is weak or absent. In WACAF, much of the monitoring function is effectively outsourced to regional organizations like AFCAC, resulting in overlap. ESAF reports highlight low awareness of ICAO's EDAT tools, while in the MID region post-crisis, monitoring has reverted to a reactive, request-driven mode.

85. At the national level, effectiveness largely depends on local capacity and political will. In APAC region, many countries have embedded ICAO frameworks into national planning, demonstrating clear benefits. In WACAF region, one country reported measurable progress on liberalization indicators with ICAO support. Yet many states stress that training and workshops often lack structured follow-up, meaning lessons are not institutionalized. For smaller or lower-capacity states, ICAO's one-size-fits-all approach is a recurring concern; they require tailored monitoring tools to fit their institutional realities (see Figure 6).

Figure 6: Summary – effectiveness of monitoring and evaluation performance

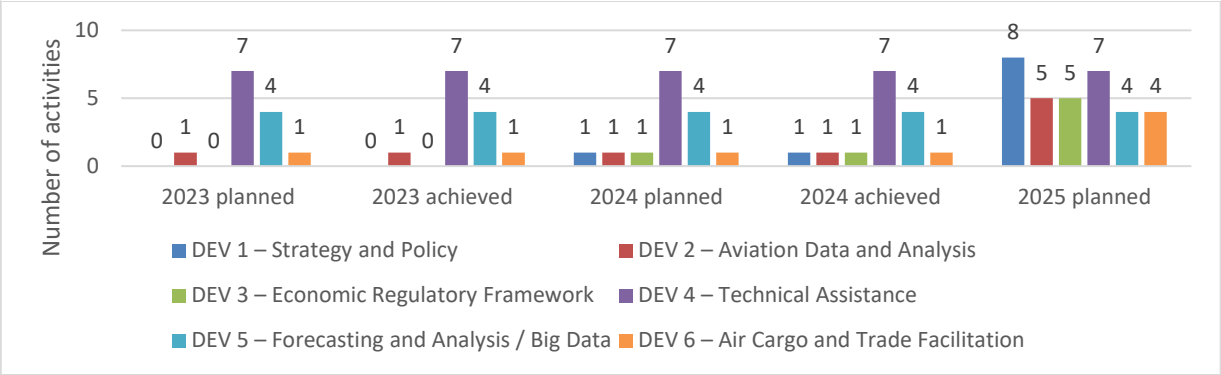
Level	Strengths	Weaknesses
HQ (ICAO Secretariat & ATB)	• Maintains updated economic policies (Docs 9587, 9626, 9082) considered fit for purpose. • Provides authoritative analytical support and datasets for Council/working groups.	• No robust implementation model; reliance on voluntary follow-up. • Delayed data releases limit policy influence. • Little systematic tracking of state-level adoption or outcomes.
Regional Offices	• APAC: ICAO workshops integrated into ASEAN liberalization and planning. • MID: Effective monitoring during COVID crisis, close HQ–regional–state coordination.	• SAM: No comprehensive ED performance monitoring. • WACAF: Reliance on AFCAC/IATA; limited direct impact. • ESAF: Low awareness, weak mainstreaming into safety/AN priorities. • MID (post-crisis): Mostly reactive to state requests.
National Level (Member States)	• APAC states use ICAO tools in national planning (ASEAN initiatives, consumer protection). • Some African states show measurable progress in liberalization.	• Many states cite lack of follow-up after training—impact not sustained. • "One-size-fits-all" approach not adapted to local realities

Finding 7: In 2023, ICAO implemented all activities planned under the Economic Development area of its Operational Plan, such as 13 activities in 2023 and 15 activities in 2024, according to internal monitoring data. Data for the previous period under evaluation, 2020 to 2022, is not available for further review, which limits a fully-fledged effectiveness analysis. Joint financing, one of the three ATB workstreams, is not specifically reflected in the Operation Plan components, yet it draws on ATB's human and financial resources.

86. Figure 7. summarizes the planned versus achieved activities under the Economic Development Strategic Objective for the years 2023 and 2024. For 2025, only the planned activities reveal a steep increase in

activities (from 15 to 33) under this strategic objective, while non-staff funding slightly increased and human resources were reduced. Data for the previous period under evaluation, 2020 to 2022, is not available for further review, which limits a fully-fledged effectiveness analysis. Effectiveness shows at the policy level but less so at the operational one.

Figure 7: Planned versus achieved activities under the Economic Development of Air Transportation Strategic Objective



Source: ICAO; 2025: DEV – Operational Activities-Deliverables

87. The evaluation found that the structure of the operating plan for the Economic Development Strategic Objective only partly reflects the major workstreams in ATB. Two workstreams are addressed: DEV 1 and DEV 3 refer to regulations, DEV 2 and DEV 5 relate to data, while DEV 4 and DEV 6 seem cross-cutting. However, Joint Financing, identified as the third workstream, is not explicitly reflected in the Operating Plan. According to ATB, this omission is attributable to structural and funding arrangements rather than to a limited relevance of its current scope. Although the Joint Financing Section is financed primarily through cost-recovery arrangements, certain leadership and support functions funded from the regular budget—including management oversight and broader Secretariat support—also contribute to its delivery. However, as this work is carried out by ICAO, OIO believes that irrespective of the funding modality, all work undertaken within the Bureau should be appropriately captured in the Operating Plan of the Bureau for improved planning, monitoring and reporting arrangements.

88. Figure 8. below presents examples of activities under the six deliverables for 2023, most of which continued in 2024 unless newly introduced that year. It also includes activities emerging in 2025.

Figure 8: Activities under the Economic Development Strategic Objective 2023 to 2025

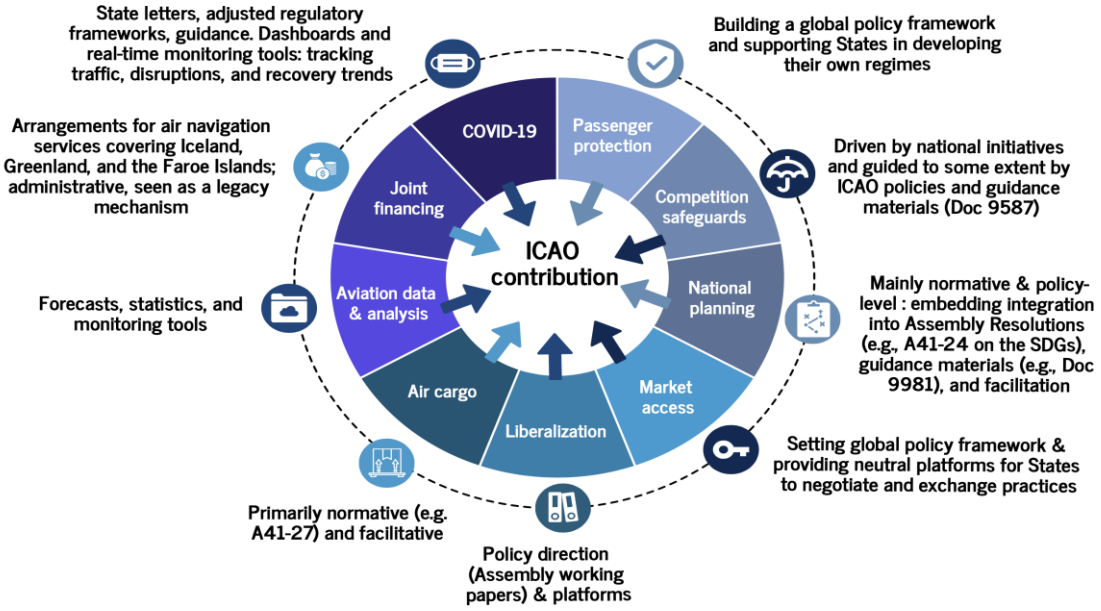
Economic Development components	Activities
DEV 1 – Strategy & Policy	• Set up a compendium of States' economic regulatory practices (2024) • Encourage States/Administrations to submit timely air transport regulatory data (2025) • Update policies and guidance, as necessary, in line with Assembly resolutions (2025) • Update the World Air Services Agreements (WASA) database (2025) • Maintain, improve, and promote the ICAO Air Services Negotiation System (ICAN) (2025)
DEV 2 – Aviation Data & Analysis	• Convene and organize the Fourth Meeting of the ICAO Aviation Data and Analysis Panel (2023) • Convene and organize the Seventeenth Meeting of the Statistics Panel (2024) • Provide support to the Air Transport Regulation Panel and its working groups (2025) • Expand ICAO long-term traffic forecast for policy applications (2025) • Update and publish ICAO competitiveness indices (2025) • Enhance visualization and dissemination of ICAO aviation data (2025)
DEV 3 – Regulatory Frameworks & Liberalization	• Finalize the development of the Air Transport Regulatory Manual (2024) • Promote the economic benefits of liberalization (2025) • Update policies on the economics of airports and air navigation services (2025) • Maintain compendiums of States' competition and consumer protection practices (2025) • Conduct studies and develop guidance on foreign investment in airlines (2025)
DEV 4 – Technical Assistance	• Conduct loading, verification, and validation of State-submitted data (2023) • Disseminate ICAO data through EDM and iCADS platforms (2023) • Report aviation data to the UN for the UN Sustainable Development Goals (2023) • Provide updated forecasting work to the Aviation Data and Analysis Panel (2023)
DEV 5 – Big Data & Innovation	• Ongoing processing of ICAO Big Data sources and analytics (2023) • Develop and maintain visualization tools for aviation data (2023) • Expand applications of predictive analytics (2023) • Enhance business analysis tools for States (2023)
DEV 6 – Air Cargo & Trade Facilitation	• Organize and conduct the annual ICAO Air Services Negotiation Event (ICAN) (2023) • Support the Organization's efforts on air cargo liberalization and facilitation (2025) • Collaborate with UPU on e-commerce and air cargo policies (2025) • Develop guidance on cargo and trade facilitation (2025)

Finding 8: Despite having accomplished all activities presented under the respective Operational Plans for 2023 and 2024, stakeholder feedback and survey data suggest that ICAO has made only moderate progress in implementing the overall Economic Development Strategic Objective, mostly at the normative level, with limited operational results, as reflected in an average satisfaction rate of 55.6%. Stakeholders view ICAO's effectiveness under the EDAT Strategic Objective as mixed, valued for ICAN, updated policies, and, to some extent, data, but constrained by political sensitivities, voluntary and uneven implementation, underused and delayed tools, limited cross-ministry and industry engagement, slow and unclear inter-agency coordination, and a lag in adapting and integrating statistics into decisions, with a clear call to expand into emerging areas like unmanned aircraft regulation and economic guidance.

89. According to the stakeholder feedback, the effectiveness of ICAO under the Economic Development Strategic Objective is mixed. While ICAO delivers value through ICAN, updated policies, and, to some extent, data provision, its effectiveness is constrained by slow implementation, underused tools, limited political alignment, and insufficient industry engagement.

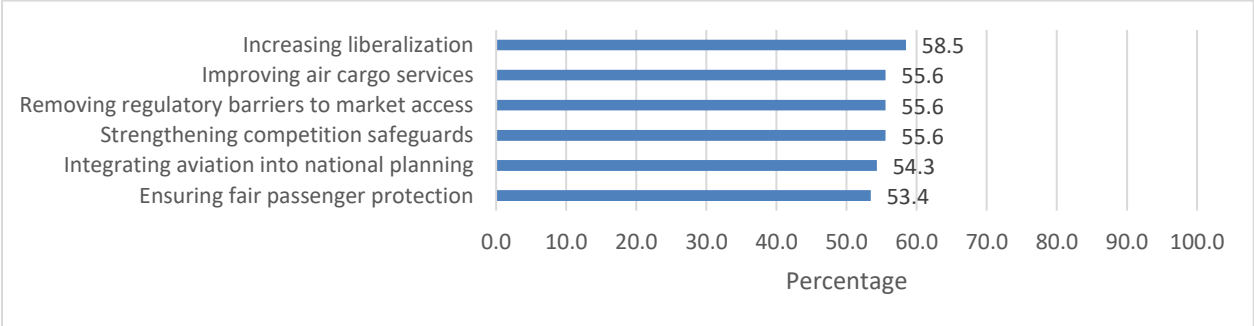
90. Figure 9. summarizes ICAO's contribution concerning its Economic Development Strategic Objective. The results are presented in detail in the following sections.

Figure 9: ICAO contribution to components under the Economic Development Strategic Objective



91. Progress in economic development topics: Figure 10 provides the perception of Member States and their administrations on the effectiveness of the different categories of ICAO's Economic Development Strategic Objective.

Figure 10: Member States' and administrations' perception of effectiveness of work on ICAO's Economic Development Strategic Objective (n=63)



92. Partners recognize ICAO's strengths in data quality and policy frameworks but see shortcomings in adapting quickly to emerging issues and ensuring that statistics are consistently integrated into decision-making. Coordination with other UN agencies is also hampered by slow negotiations and unclear processes, even if gender-disaggregated data and governance collaboration are valued. The need for ICAO to engage in new topics emerges, such as unmanned aircraft, including model regulations and economic guidance for drone operations, as stated by several Member States which is considered by ATRP/18.

Passenger Protection

Finding 9: ICAO has advanced a global passenger-protection framework—embedding consumer rights in policy, compiling comparative guidance, running regional workshops, using ICAN to mainstream provisions in ASAs, and expanding monitoring with gender/accessibility data. Yet impact is uneven and mostly normative, Member States are calling for operational tools (model laws, harmonized guidance) and stronger, tailored capacity-building so rights are consistently implemented and enforced, especially in developing and smaller states.

93. ICAO's work on passenger protection has centered on building a global policy framework and supporting States in developing their own regimes[26]. In this regard, ICAO has advanced passenger protection by establishing and promoting its Core Principles on Consumer Protection, which serve as a global benchmark for Member States when developing or revising national passenger rights regimes.[27] These principles address the entire passenger journey, emphasizing transparency before travel, clear communication and care during disruptions, and efficient complaint handling after travel. ICAO has also developed guidance materials covering key areas such as conditions of carriage, fare guarantees, baggage handling, denied boarding, and code sharing, all compiled in its Policy and Guidance Material on the Economic Regulation of International Air Transport (Doc 9587).

94. In ensuring equal access and special assistance for passengers with disabilities, ICAO has taken steps to advance accessibility in international air transport. ICAO approved binding international standards within Annex 9 – Facilitation, requiring all Member States to provide special assistance and ensure equal access for passengers with disabilities.[28] These standards mandate accessible information for hearing- and vision-impaired travelers, obstacle-free airport routes and designated parking and drop-off points. ICAO has also convened global stakeholders Symposium in 2024 on Accessibility, fostering collaboration and sharing best practices. However, accessibility regulations are still fragmented across jurisdictions, leading to inconsistent experiences for travelers with disabilities. Physical and technological barriers persist, and there is a need for more universally coordinated standards and practices.

95. To support implementation, the Organization has produced compendia of national practices, comparative studies, and model approaches that provide reference points for harmonization of compensation, refund, and complaint-handling rules. It has also facilitated capacity-building by organizing regional workshops and awareness activities, though these efforts have varied in coverage and impact. Platforms such as ICAN

[26] ICAO. *Doc 9587: Compendium of Conclusions, Decisions and Guidance Material for Member States: Fourth Edition*. Montréal
ICAO / IATA / Other stakeholders. "Celebrating 10 Years of ICAO Core Principles on Consumer Protection"
[27] https://www.icao.int/consumer-protection
[28] https://unitingaviation.com/news/security-facilitation/aviation-standards-to-enhance-the-accessibility-of-air-transport-for-persons-with-disabilities/

have further provided opportunities for bilateral and multilateral discussions where passenger rights provisions are increasingly embedded in air services agreements. In parallel, ICAO has actively monitored implementation through global surveys and by compiling information on States' passenger protection frameworks, including gender-disaggregated and accessibility-related data. Despite these accomplishments, there are reports indicating disparities in passenger protection rights across the international civil aviation system. While some countries have established comprehensive regulations—such as the EU's Regulation (EC) No 261/2004—others lack comprehensive frameworks, resulting in inconsistent levels of protection for travelers. This inconsistency undermines the principles of fairness, predictability, and safety in global air transport, disproportionately affecting resource-poor states and leaving passengers vulnerable during disruptions like cancellations, delays, and denied boarding. [29] Although ICAO has promoted good practices and the Chicago Convention underscores the importance of passenger protection, the absence of a binding international instrument perpetuates legal gaps and overlaps.

96. ICAO's progress mainly reflects national and regional initiatives, with ICAO contributing indirectly through global frameworks and awareness rather than driving operational implementation. The evaluation found examples of Member States in APAC modernizing consumer-protection regimes; in EUR/NAT achieving the highest harmonization in the case of the EU, largely due to the implementation of EU Regulation 261/2004, supported by active enforcement; in ESAF building complaint channels and aligning compensation with benchmarks; in several countries MID introducing dedicated regulations and modernized complaints procedures. ICAO is appreciated in NAAC for helping harmonize passenger-rights approaches, but impact is uneven—larger states lean on domestic regimes while smaller states ask for more tailored capacity-building and implementation support. However, the evaluation noted that countries in WACAF making only limited advances amid generally slow progress.

97. Member States emphasize that ICAO's support remains mostly normative and uneven in its practical effect. They call for more operational tools—such as model laws, harmonized global guidance and legal standards, and tailored training—to enable consistent application of passenger rights across regions. In particular, developing and smaller States seek stronger ICAO-led capacity-building and implementation support to ensure that passenger protection is not only recognized in policy but also effectively enforced in practice[30].

Competition Safeguards

98. ICAO has also promoted the integration of aviation into national planning and facilitated monitoring and evaluation tools to help Member States assess and improve their competition policies. However, significant gaps and challenges persist: implementation remains uneven across regions, with some states lacking the capacity or resources to enforce safeguards effectively; the pace of updating guidance materials sometimes lags industry developments, especially in areas like digital platforms and AI pricing; and there are persistent challenges in systematic data collection and stakeholder engagement for monitoring progress. Ultimately, while ICAO's efforts have advanced competition safeguards, the absence of binding international instruments and disparities in national enforcement continue to pose major challenges to achieving uniform and effective competition protections worldwide. Based on the feedback from Member States and

[29] A42-WP/483

[30] Based on information obtained through the evaluation online survey and interviews

authorities, ICAO's contribution to competition safeguards is visible, although its effect is uneven across regions and is still developing.

99. Over the past five years, ICAO has made progress in strengthening competition safeguards in international air transport, primarily through the regular updating and dissemination of core guidance materials such as Doc 9587 (Policy and Guidance Material on the Economic Regulation of International Air Transport) and Doc 9626 (Manual on the Economic Regulation of International Air Transport). These documents remain central references for Member States, and several States explicitly valued their utility in shaping national and regional competition policies. States request ICAO to keep updating these materials to reflect new realities like digital platforms, AI pricing, and new business models. ICAO's support is perceived as strongest where it links competition safeguards to liberalization platforms like ICAN.

100. Overall, the efforts to strengthen competition safeguards are increasingly visible across most ICAO regions, driven by national initiatives and guided to some extent by ICAO policies and guidance materials[31] such as DOC 9587, with APAC where regional leadership is strong. Progress on competition safeguards largely reflects national and regional initiatives, with ICAO contributing indirectly through policy frameworks and dialogue rather than driving enforcement. The evaluation found examples of Member States in APAC region pairing liberalization with robust enforcement and aviation-specific safeguards; in EUR/NAT benefiting from integrated regional competition frameworks with supportive national measures; in ESAF making gradual, SAATM-aligned advances, including new laws and mechanisms to curb anti-competitive behavior; in MID strengthening regulators and embedding safeguards in agreements. In NAAC, effectiveness is mixed, concerns persist about consistency of approaches across the region, and stakeholders call for clearer, harmonized enforcement frameworks plus training to strengthen regulators, while countries in WACAF are moving more slowly overall despite isolated legal reforms.

National Planning

Finding 10: ICAO's contribution to integrating aviation into national and sectoral plans is largely normative and policy-level—embedding principles in resolutions, guidance, and awareness platforms—while Member States drive reforms and increasingly seek practical toolkits and technical assistance, positioning ICAO as a catalyst and capacity-builder to embed aviation as a strategic enabler of trade, tourism, sustainability, and infrastructure.

101. ICAO's contribution to integrating aviation into broader national and sectoral development plans is primarily normative and policy-oriented[32]. It has embedded the concept of integration in Assembly Resolutions such as A41-24 on the SDGs, developed key guidance materials, and used ICAN and regional workshops to raise awareness. The ICAO Strategic Plan 2026–2050 further reinforces the vision of aligning international civil aviation with national development, sustainability, and socio-economic priorities. Supporting this vision, ICAO's Policy and Guidance Material on Economic Regulation, Air Transport Facilitation, and Data helps Member States harmonize national aviation policies with global standards.

[31] ICAO.Doc 9587 – Policy and Guidance Material on the Economic Regulation of International Air Transport
ICAO. Doc 9626 – Manual on the Economic Regulation of International Air Transport.

[32] ICAO. Strategic Plan 2026-2050. Includes national planning as part of strategic goals to ensure inclusive, viable, resilient aviation systems.
ICAO. Input to the Thematic Review of the High-Level Political Forum on Sustainable Development (HLPF), 2021.
ICAO. Resolution A41-24: Aviation's contribution towards the United Nations 2030 Agenda for Sustainable Development
ICAO. Doc 9981: Aerodromes

102. Through frameworks such as Doc 9587 on the Economic Regulation of International Air Transport, ICAO assists States in liberalizing markets, enhancing connectivity, and promoting fair competition—core elements for integrating aviation into national economic, trade, and tourism strategies. The Organization's data solutions and analytical tools complement this normative guidance by providing the evidence base needed for policy-making and strategic planning. Together, these efforts position aviation as a driver of sustainable growth, job creation, and social development, contributing to the achievement of the UN Sustainable Development Goals (SDGs).

103. However, ICAO's normative efforts alone are not sufficient to achieve full integration. Member States increasingly request more operational support, including planning toolkits, technical assistance, and implementation guidance to translate policy frameworks into national action. While ICAO's Business Plan commits to supporting such practical integration, progress has been uneven. For instance, the 2019 draft National Aviation Planning Framework developed by SPCP[33] has yet to be finalized or fully coordinated with the Economic Development of Air Transport team. Strengthening the link between strategic guidance and hands-on support remains critical for helping States embed aviation effectively into national development planning.

104. Regional developments illustrate varying degrees of progress. In APAC, integration efforts are advancing from policy intent to operational implementation, while in EUR/NAT, cross-modal coordination and evidence-based investment are embedding aviation within broader mobility and green agendas. ESAF shows progress through standardized metrics and dashboards, aligning aviation with energy, trade, and workforce strategies. In contrast, MID, NACC, SAM, and WACAF demonstrate diverse levels of maturity—ranging from strong political buy-in and governance integration (NACC, SAM) to early-stage efforts requiring greater digital and institutional capacity (WACAF). Across all regions, progress is strongest where ICAO's normative frameworks are complemented by targeted operational support and local ownership.

Market Access

105. ICAO's contribution to market access lies primarily in setting the global policy framework[34] and providing neutral platforms for States to negotiate and exchange practices. Through Assembly's resolutions[35] and the ICAN negotiation forum, ICAO has helped governments modernize bilateral agreements, pursue more liberalized ownership and access rules, and align national reforms with regional initiatives such as ASEAN Open Skies[36] and SAATM[37]. It also supports transparency by maintaining compendiums of agreements and model clauses that States can adapt. However, while these tools have underpinned progress, the actual reforms—such as changes in ownership caps, licensing laws, or tariff-filing requirements—are largely driven by States and regional organizations. Member States consistently highlight ICAN as one of ICAO's most effective instruments, but also call for more concrete support, including model laws, data, toolkits, and training, to ensure market access reforms are applied more consistently and inclusively across regions. Member States' and authorities' feedback gathered through the online survey indicated that reforms aimed

[33] ICAO (SPCP), 2019: National Aviation Planning Framework" (2019)

[34] ICAO.*Doc 9587: Policy and Guidance Material on Economic Regulation of International Air Transport*. Montréal: ICAO; ICAO *Manual on the Regulation of International Air Transport (Doc 9626)*. Montréal: ICAO;
ICAO.*Report of the Survey on Barriers to Market Access and Foreign Investment in Airlines*. April 2025.

[35] A41-27 (2022) or A40-18 in 2019

[36] Chia, S. Y. *The Political Economy of ASEAN Open Skies Policy*. Global Policy; 2020.

[37] AFCAC. *Continental Study on the Benefits of the Single African Air Transport Market (SAATM)*. African Civil Aviation Commission; 2023

at removing regulatory barriers to market access have accelerated significantly, particularly in APAC and EUR/NAT. Non-exhaustive examples are listed below.

106. Progress on market access largely reflects national and regional initiatives, with ICAO contributing indirectly through policy frameworks and facilitation rather than implementing reforms. The evaluation found examples of Member States in APAC opening markets to foreign participation and increasing bilateral flexibility—set against the backdrop of ASEAN "Open Skies," i.e., the ASEAN Single Aviation Market integrating intra-ASEAN air services liberalization. In EUR/NAT, market access operates within an integrated regional regime under EU Regulation 1008/2008 and the European Common Aviation Area (ECAA), with further liberalization via agreements with third countries. ESAF advances under SAATM via liberal bilateral provisions and streamlined certification; MID modernizes licensing and pursues liberal ASAs; In NAAC, ICAO adds clear value through bilateral facilitation (e.g., ICAN) and targeted technical help, yet progress varies widely by state capacity and reliance on domestic frameworks. SAM eases ownership limits and broadens access to boost connectivity; and WACAF moves more slowly overall, with progress largely tied to SAATM commitments.

107. Despite ICAO's efforts highlighted above, Member States continue to face persistent barriers to expanding market access, due to different reasons including limited technical capacity, fragmented regulatory frameworks, and inadequate funding mechanisms. In many cases, expectations for ICAO's support exceed what is currently available, and the connection between its regional activities and measurable economic outcomes remains weak. Furthermore, there is a lack of clarity regarding how ICAO's strategic objectives are operationalized at the country level, particularly in relation to infrastructure investment and policy implementation. To address these challenges, ICAO must strengthen its implementation support through tailored capacity-building initiatives, improve regional coordination, and establish financing mechanisms that enable States to invest effectively in aviation infrastructure. Additionally, expanding ICAO's monitoring and evaluation frameworks is essential to better assess the impact of its market access initiatives and ensure that its support is closely aligned with the specific needs of Member States.

Liberalization

Finding 11: ICAO advances air transport liberalization through global policy frameworks and platforms like ICAN, enabling States to negotiate more open-air service agreements. However, progress is slowed by political sensitivities, voluntary uptake, uneven regional coordination, and limited institutional capacity. While ICAO provides tools such as the WASA database and model clauses, their impact is constrained by underuse and gaps in training, especially in Africa. Member States call for ICAO to move beyond policy guidance toward practical support—toolkits, training, and implementation assistance—to ensure sustainable results.

108. ICAO has consistently advocated for progressive liberalization of air transport services, including passenger and cargo markets. Its strategic plans emphasize liberalization as a driver of economic growth, connectivity, and global integration. However, ICAO's work on liberalization appeared slowed by national interests, voluntary implementation, uneven regional coordination, and insufficient legal and institutional capacity. ICAO's advisory role, without binding enforcement mechanisms, means progress depends heavily on voluntary State action. While initiatives like ICAN are seen as successful, many data tools and workshops have had limited long-term effect due to delays, underuse, and gaps in training or cross-ministry engagement, particularly in Africa.

109. ICAO's contribution to liberalization is anchored in its normative leadership and facilitative role. Its contribution has been most visible in the policy direction it provides[38] and the platforms it creates for States to act. Through the Consolidated Statement on Air Transport Policies (A41-27), ICAO sets a global framework that explicitly encourages States to remove barriers, embrace fair competition, and move toward more open markets. This policy mandate is operationalized primarily through ICAN. At ICAN, governments negotiate new or amended air services agreements and embed liberalized provisions—paralleling ICAO's role in market access, where ICAN also enables flexibility in ownership, designation, and tariff regimes.

110. ICAO further supports liberalization by maintaining the WASA database of bilateral agreements and promoting model liberalization clauses, which States adapt in their negotiations. These tools enhance transparency and consistency, much as ICAO's compendiums of agreements and model clauses underpin reforms in market access. At the same time, Member States again call for ICAO to go further, moving beyond high-level frameworks toward more practical support, such as toolkits, training, implementation guidance, advocacy, and tailored support, to help ensure liberalization delivers consistent and sustainable results across all regions.

111. The evaluation's data collection confirmed that liberalization of air services is a leading global trend, with APAC out front via the ASEAN Single Aviation Market and cross-regional agreements like the ASEAN-EU Comprehensive Air Transport Agreement (CATA), alongside extensive bilateral expansions and ownership/freedoms reforms. ESAF is accelerating under SAATM, EUR/NAT leverages the EU's integrated single aviation market while continuing bilateral deals, and SAM advances open-skies frameworks with new rights concluded under LACAC Memorandum of Understanding (MoU)s. In the Caribbean (NACC), liberalization emphasizes route growth and the prioritization of seventh-freedom rights—particularly in cargo operations—while WACAF's progress remains uneven and fragmented. More specific regional operational support is needed to support the implementation of the above liberalization initiatives.

Air Cargo

112. ICAO's contribution to air cargo liberalization and development has also been primarily normative and facilitative[39]. ICAO has modernized the global air cargo regulatory framework to support the adoption of electronic solutions. This includes developing and updating SARPs that encourage States and industry stakeholders to move away from paper-based processes. Through Assembly Resolutions such as A41-27 and, again, the ICAN negotiation platform, ICAO has provided the policy framework and neutral

[38] Examples of 2025 Assembly working paper include the following:
ICAO. A42 WP/178 (2025): Continuing work on market liberalization; proposal to develop a TASA-based multilateral template.
ICAO. A42 WP/89 (2025): A "Toolbox" to help air transport liberalization
ICAO. A42 WP/125 (2025): Reviewing and modernizing TASA for multilateral approaches.
ICAO. A42 WP/255 (2025): Panel recommendations to continue liberalization via TASA review.
ICAO. A42 WP/180 (2025): Proposal for standard monitoring indicators to ensure a fair competitive environment in liberalized markets.
ICAO. A42 WP/409 Rev.1 (2025): Doc 9626 guidance on conditions for bilateral/multilateral liberalization.
ICAO. A42 WP/477 (2025): Principles that competition be fair and enable non-discriminatory market access/exit in liberalized regimes

[39] ICAO. *Air Cargo Priority Brief*. Montréal: ICAO; 2021.
ICAO.*Air Cargo & the UN Sustainable Development Goals*. Montréal: ICAO; 2020.
ICAO. *Air Cargo Digital Document Specifications*. Montréal: ICAO; 2023.

environment for States to negotiate seventh-freedom cargo rights and modernize agreements. Its guidance materials and cargo compendiums have supported States in aligning practices, while COVID-19 highlighted ICAO's role in issuing global guidance to keep supply chains operational, as further explained in the following section. ICAO has also developed Implementations Packs (iPacks) to help states maintain cargo operations during disruptions. These packages include guidance on regulatory flexibility, health protocols, and digitalization, demonstrating ICAO's proactive support for cargo continuity and liberalization.

113. ICAO regularly convenes global forums, such as the ICAO Air Cargo Development Forum, which bring together regulators, industry stakeholders, and experts to address regulatory and operational challenges. These forums facilitate knowledge sharing and promote harmonized approaches to air cargo liberalization.[40] Over the past six years, air cargo has expanded rapidly on the back of digitalization, new hub infrastructure, and more liberal market access. APAC leads innovation; EUR/NAT advances through digital and physical upgrades; MID is building large-scale hub facilities; ESAF is focusing on cross-border integration and capacity building; SAM is using liberalized seventh-freedom cargo rights to facilitate trade; NACC shows fast but uneven gains with growing seventh-freedom operations; and WACAF's progress is fragmented with a few standout logistics hubs.

114. Across themes, APAC and EUR/NAT consistently set the pace through regulatory innovation, open-skies frameworks, and sustained investment, SAM leverages liberalization for economic integration, MID concentrates on hub-led logistics strategies, ESAF accelerates under SAATM but faces capacity constraints, NACC remains mixed, and WACAF is earlier-stage overall. The cumulative effect points to greater openness, connectivity, and integration of aviation into national economic strategies—alongside persistent regional disparities in regulatory capacity, infrastructure, and policy harmonization.

115. However, as with liberalization and market access more broadly, the major reforms—investment in hubs, digital platforms, and cargo rights expansion—are State- and region-led, with ICAO playing a catalytic but indirect role. Member States consistently signal the need for ICAO to strengthen technical assistance, training, and digitalization support so that cargo growth can be more evenly distributed across regions, as for other workstreams.

Aviation and Data Analysis

116. Over the past six years, ICAO has made aviation data and analysis[41] one of its strongest contributions to States, providing forecasts, statistics, and monitoring tools that have supported both long-term planning and immediate crisis management during COVID-19. These data products are widely used to negotiate agreements, assess infrastructure investment, and align with environmental targets such as LTAG 2050. However, stakeholders across all regions point to the same limitations: timeliness, granularity, and accessibility. As a result, there are States who prefer using data generated from other sources. While APAC and EUR/NAT emphasize the need for high-resolution analytics and environmental integration, ESAF and

[40] https://www.icao.int/events/first-icao-global-air-cargo-summit

[41] For example: ICAO. *Aviation Data* (site / statistics programme).
ICAO. *Economic Analyses and Forecasting programme description*.
ICAO. *Databases and Studies* portal.
ICAO. *ICAO DATA+*and associated eTools (traffic maps, WASA database, interactive tools) for benchmarking & trend visualization.
ICAO. *Aviation Data Solutions / Civil Aviation Data Intelligence & Information Systems*.

WACAF require capacity-building and tailored dashboards, and NACC/SAM request stronger linkages to trade and tourism data. ICAO's normative and neutral role in global data provision is valued, but the evaluation shows that its policy utility is constrained when datasets are outdated, commercialized, or insufficiently customized to regional and national needs.

117. Across all regions, ICAO's data and forecasting tools are valued for supporting aviation policy and planning, particularly during the COVID-19 crisis when APAC States used real-time dashboards to guide reopening. However, many countries requested more timely, granular, and region-specific data, along with LTAG projections for climate and economic planning. In EUR/NAT and ESAF, ICAO's statistics are trusted but often outdated or insufficiently adapted to regional needs, underscoring the importance of capacity-building. In WACAF and MID, limited awareness and fragmented engagement highlight the need for better digital platforms, localized tools, and training. NACC and SAM States value ICAO's neutral benchmarks but urge stronger integration of aviation data with trade, tourism, and national economic strategies.

Joint Financing

Finding 12: ICAO's contribution to Joint Financing remains operationally effective in its long-standing arrangements. However, this work remains limited within ICAO's broader economic development portfolio and would benefit from clearer strategic positioning, modernization, and stronger integration into monitoring and reporting.

118. ICAO's contribution to joint financing has historically been visible in the North Atlantic region, where the Organization continues to administer well-established joint financing arrangements for air navigation services covering Iceland, Greenland, and the Faroe Islands. These mechanisms ensure cost-sharing across multiple States for the provision of cross-border infrastructure and oceanic ANS, and they are widely recognized as effective and reliable. The arrangements demonstrate ICAO's ability to administer international cost-recovery frameworks and to ensure the equitable provision of services in shared airspace, particularly, where historically, no single State could reasonably bear the full cost. The Satellite Distribution System for Information Relating to Air Navigation (SADIS) also provides meteorological and aeronautical information to States.

119. Joint financing within ICAO's economic development portfolio over the past six years has remained limited, despite some established and emerging arrangements. These include the long-standing Danish and Icelandic Joint Financing Agreements, arrangements such as SADIS that serve multiple regions, and more recent work on cost recovery for space weather information services. Beyond these examples, joint financing and related cost-recovery work have not featured prominently in the wider portfolio. In other regions, Member States rarely refer to joint financing directly but instead stress the need for innovative financing approaches to address infrastructure, modernization, and sustainability requirements. In particular, ESAF and WACAF countries point to financing gaps for airport and ANSP upgrades and call on ICAO to help mobilize private investment and public-private partnership arrangements.

120. The emerging LTAG 2050 sustainability agenda intensifies these demands: many developing States stress that they will bear disproportionate costs in decarbonization and modernization, and they look to ICAO for country-level financing solutions. While the North Atlantic arrangements remain the most established expression of joint financing, ICAO's related cost-recovery experience also extends beyond that context, including arrangements such as SADIS and more recent work on cost recovery for space weather information services. This experience offers a valuable precedent that could be adapted. There is a clear opportunity for ICAO to expand its role by leveraging its expertise to design and promote new collaborative

financing models, for example, multi-State or regional cost-sharing schemes, pooled climate finance for LTAG implementation, or regional investment platforms for airport and ANSP modernization.

121. In general, the current joint financing arrangements and approach are efficient and deliver value within their existing scope. Their broader strategic relevance to ICAO's current economic development agenda would, however, be strengthened through modernization and by building on related cost-recovery initiatives, including multi-regional arrangements and emerging areas of work. ICAO may therefore need to reassess its approach by identifying more proactively where joint financing could support contemporary financing needs and by assisting States in establishing such arrangements, building on an effective existing foundation.

Covid-19 Related Work

122. Globally, ICAO's response to COVID-19 was widely recognized as relevant and timely. It issued State letters, adjusted regulatory frameworks, and provided guidance on issues such as license validity, operational continuity, and public health measures at borders[42]. ICAO's dashboards and real-time monitoring tools were particularly valued for tracking traffic, disruptions, and recovery trends. The ICAN platform and bilateral support also helped States reopen markets and negotiate temporary arrangements. However, once the immediate crisis passed, stakeholders noted a drop-off in sustained follow-up, with gaps in regional tailoring, long-term recovery guidance, and capacity-building support.

123. ICAO's guidance on cargo facilitation and temporary liberalization measures was particularly valued in APAC, where it helped keep supply chains open and enabled passenger networks to restart gradually. While States welcomed the speed of regulatory flexibilities, they also sought more detailed support to guide long-term recovery.

124. Owing to the presence of strong national and EU-level frameworks, EUR/NAT States mainly relied on ICAO as a global benchmark and coordination platform. Monitoring tools proved useful in aligning reopening with international partners, though Member States underlined the need for guidance that better reflects regional realities.

125. In ESAF, the issuance of State letters on license extensions and the creation of forums for bilateral coordination were seen as crucial contributions. Yet without follow-up training or region-specific implementation support, the impact of these measures was limited over time.

[42] ICAO. *Manual on COVID-19 Cross-Border Risk Management (Doc 10152), Third Edition*. Montréal: ICAO; 2021.
ICAO. *Testing and Cross-Border Risk Management Measures Manual (Doc 10152), Second Edition (Advance Unedited)*. Montréal: ICAO; 2021.
ICAO. *Council Aviation Recovery Task Force (CART) Report: Guidance for Air Travel through the COVID-19 Public Health Crisis*, Fourth Edition, August 2021. Montréal: ICAO; 2021.
ICAO. *Updated List of Key Principles and Recommendations of the ICAO Council Aviation Recovery Task Force (CART)*. Montréal: ICAO; 5 October 2021.
ICAO. *Public Health Safety and Related Facilitation Measures – Review and updates of Doc 10152: Manual on COVID-19 Cross-Border Risk Management*. Montréal: ICAO; October 2021.
ICAO. *Global Implementation Roadmap of the Recommendations and Guidance of the Council Aviation Recovery Task Force (CART)*. Montréal: ICAO; [Date],
ICAO. *High-Level Cover Document for the CART Phase II*. Montréal: ICAO; 2020.

126. COVID-19 guidance helped sustain a basic level of connectivity in WACAF, but recovery lagged as infrastructure and institutional capacity gaps remained. Here, States called for more active engagement to ensure global guidance was linked to their regional economic recovery priorities.

127. Immediate advice on border management and health facilitation was well received in the MID region. However, engagement sometimes appeared fragmented, and stakeholders asked for stronger coordination with regional organizations to avoid duplication and delays.

128. Dashboards and traffic monitoring tools proved especially valuable in NACC and SAM, where they supported both operational continuity and recovery planning. Member States stressed that such tools should not disappear with the crisis but instead be embedded in broader strategies for economic development.

REGIONAL SUMMARY: SATISFACTION ABOUT QUALITY AND QUANTITY OF RESULTS, INCLUDING POLICY UPDATING

Finding 13: ICAO's work under the Economic Development Strategic Objective is slowed by fragmented regulatory alignment, reliance on voluntary adoption, and uneven regional integration of ICAO policies, resulting in moderate Member State and administration satisfaction, varying from 52.3% in WACAF to 62.0% in MID. Greater impact requires faster data, targeted capacity-building, and stronger alignment between ICAO frameworks and national strategies to ensure equitable global aviation growth.

129. Over the past six years, ICAO Member States have made progress across six major thematic areas: passenger protection, competition safeguards, integration of aviation into national planning, removal of regulatory barriers to market access, liberalization of air services, and improvement of air cargo services.

Figure 11 complements the qualitative data presented in this section and provides regional insights.

Figure 11: Member States' and administrations' perception of the effectiveness of ICAO economic development support-regional breakdown by aggregated effectiveness scores (n=63)

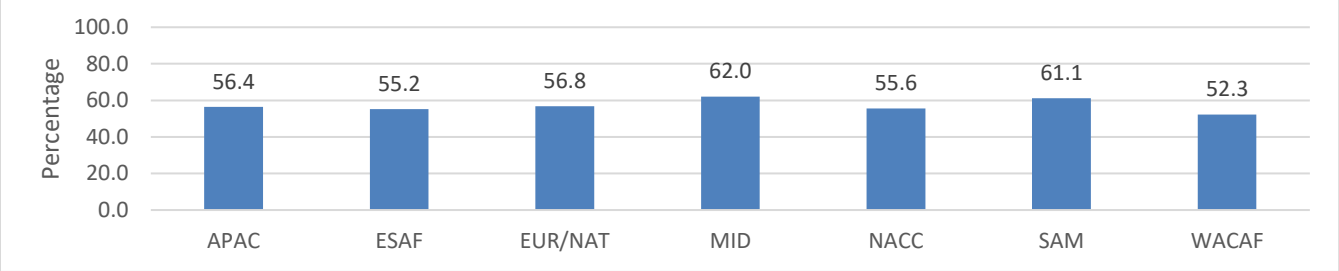


Figure 12 contains an overview of the accomplishments and challenges of ICAO economic development support, as perceived across regions.

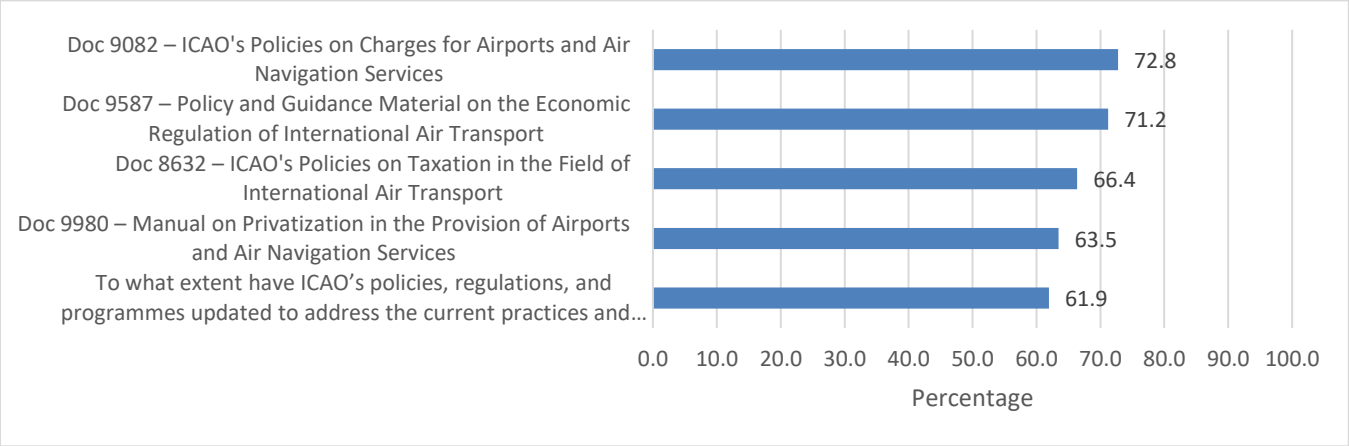
Figure 12 : Effectiveness of ICAO economic development support: accomplishments and challenges (n=63)

Region	Positive Feedback	Challenges / Concerns
APAC	- ICAO workshops and training **helped integrate economic policies** into national plans. - ICAO frameworks widely used for **liberalization, passenger rights, and connectivity**.- **ASEAN initiatives align well** with ICAO strategies.	- Some countries request **more region-specific guidance**. - Need for **faster data updates** and more direct technical assistance.
ESAF	- ICAO support appreciated for **capacity-building and standard-setting.** - States value ICAO's **policy frameworks** for market access and passenger protection.	- **Inconsistent tailored technical assistance** across countries. - Requests for **greater funding and on-site advisory missions**. - Lack of integration between ICAO economic policies and **local priorities**.
EUR/NAT	- ICAO standards used to **supplement EU-led aviation frameworks**. - Respondents appreciate ICAO's role in **harmonization at the global level**.	- EU-driven frameworks (**EASA, ECAC**) dominate regulatory alignment. - ICAO's economic programmes seen as **less relevant for mature markets**. - Limited need for ICAO's technical support in core EU member states.
MID	- ICAO engagement praised for **close alignment with state needs**. - ICAO provides **proactive support** for liberalization, bilateral agreements, and open skies frameworks. - Strong coordination between ICAO HQ, MID office, and national authorities.	- Some requests for **more tailored strategies** for smaller states. - Calls for **better integration of economic programmes with safety and navigation initiatives**.
NACC	- ICAO is highly valued by **smaller island states** for technical assistance and bilateral facilitation. - Respondents appreciate ICAO's role in **passenger rights harmonization**.	- Larger states (**US, Canada**) rely mainly on **domestic frameworks**, - Smaller states request **more tailored capacity-building programmes**.
SAM	- ICAO valued for **guidance on connectivity, liberalization, and passenger protection**.- Several countries report success using ICAO policies for **national planning**.	- ICAO sometimes perceived as **less active** than regional bodies like **CLAC**. - Limited funding and **delays in technical support** cited as concerns. - Requests for **more Spanish/Portuguese ICAO materials** for better accessibility.
WACAF	- Some respondents praise ICAO's **standard-setting role**. - A few states noted progress on **bilateral liberalization agreements** via ICAO support.	- ICAO perceived as **less engaged** on economic frameworks. - Overlaps with **AFCAC** create confusion on roles. - Requests for **more funding, training, and coordination**. - States face **infrastructure and capacity gaps**, making ICAO frameworks harder to apply.

130. Figure 13 shows that ICAO's regulatory and policy frameworks are generally viewed as useful in addressing current aviation sector challenges. The highest-rated tools are Doc 9082 on airport and air navigation charges (72.8%) and Doc 9587 on economic regulation guidance (71.2%), reflecting strong relevance for states. Policies on taxation (Doc 8632) score 66.4%, while the manual on privatization (Doc 9980) is seen as moderately useful at 63.5%. Overall, 61.9% of respondents believe ICAO's policies and programmes remain adequately updated to address evolving sector needs.

Finding 14: ICAO's regulatory and policy frameworks are generally regarded as effective in addressing current challenges in the aviation sector. Foundational documents such as Doc 9082 and Doc 9587 are widely valued for their guidance on Charges for Airports and Air Navigation Services and on Economic Regulation of International Air Transport. However, the regulatory and policy frameworks' long update cycles, limited training opportunities, and underutilization of data-driven tools hinder long-term effectiveness.

Figure 13: Utility of ICAO's regulations and policies/practices in addressing the current practices and challenges of the aviation sector (n=62)



131. The evaluation noted strong and divergent views on ICAO's role in the UN Model Double Taxation Convention, reflecting tension between the UN's push to expand developing countries' taxation rights and ICAO's commitment to uniform, residence-based taxation to avoid double taxation and protect global connectivity[43]. Although ICAO was not part of the original convention, it has become an active participant since 2023, reaffirming the principles in Doc 8632 and relevant Assembly resolutions.

132. Debate intensified after the UN Tax Committee's 2023 proposal to revise Article 8 to allow source-State taxation for international air transport, a move ICAO warned could lead to double taxation, higher costs, and reduced efficiency[44]. ICAO responded by formally engaging with the UN process—sending letters, sharing Doc 8632, and participating as an observer at the Committee's 29th Session in 2024 to advocate for residence-based taxation[45].

133. Following the UN Committee's approval of the revised Article 8, ICAO issued a State Letter in January 2025[46], urging Member States to align with ICAO's taxation policies and coordinate aviation and finance authorities to avoid adopting source-based models. In parallel, ICAO's Council also discussed broader cost-

[43] UNDESA, 2021: United Nations Model Double Taxation Convention between developed and developing countries
[44] ICAO, 2024: Oral Update on Revision to Article 8 – International Shipping and Air transport of the United Nations Model Double Taxation Convention between Developed and Developing Countries
[45] ICAO, 2024: COUNCIL — 233RD SESSION, Ninth meeting. Cost Recovery for the Provision of Space Weather Information Services
[46] ICAO, 2025: State letter: Taxation in the Field of International Air Transport

recovery and global charging issues, noting similar implications for ICAO's legal authority and economic regulation role.

Effectiveness of partnership strategy

134. ICAO's partnership model delivers short-term successes when efforts are anchored in specific events, crises, or summits. However, the absence of a structured partnership strategy—complete with clear priorities, a stable coordination mechanism, and systematic outcome tracking—means that effectiveness remains limited. Long-term benefits and achieving of goals with lesser investment by individual organizations remain less clear. Relationships often depend on personalities and available leadership bandwidth, rather than on institutionalized processes. As a result, ICAO's partnerships are valuable but under-optimized, leaving significant potential untapped.

135. At the international organization level, cooperation exists but is slowed by structural issues. Focal points within ICAO's Air Transport Bureau frequently change, which complicates continuity. Partners also report that there is no single-entry point for engagement, making inter-agency collaboration cumbersome. Negotiations for joint frameworks have sometimes taken years to finalize, and once agreed, follow-up has been inconsistent due to staffing shortages and budget limitations. This undermines ICAO's credibility as a reliable long-term partner.

136. Similarly, over the last six years, ICAO's Aviation Partnerships for Sustainable Development (APSD) initiative has been moderately effective in strengthening the global understanding of aviation as a driver of sustainable development, particularly for developing countries and "countries in special situations." Through collaboration with UN DESA, UN-OHRLLS, the World Bank Group, and ATAG, APSD has successfully raised aviation's profile in UN policy forums such as the High-Level Political Forum and has helped integrate aviation into broader SDG discussions, emphasizing its importance for connectivity, trade, and resilience. ICAO's Assembly resolutions during this period have repeatedly reinforced aviation's socio-economic role and encouraged States to reflect it in national development planning, supporting the APSD agenda at the political level. APSD has also contributed to ICAO's efforts to mobilize resources by promoting aviation within the UN 2030 framework and by strengthening institutional coordination through ICAO's Strategic Planning, Coordination and Partnerships structures. However, despite strong advocacy outputs, documented evidence of tangible outcomes remains limited. OIO's SDG Review indicate that while partnerships like APSD enhance visibility and alignment with global development agendas, more robust outcome tracking, follow-up mechanisms, and sustained engagement with development finance institutions are needed to convert advocacy into measurable socio-economic impact. Overall, APSD has been effective in awareness-raising and agenda-setting but less effective in demonstrating concrete, quantifiable improvements in aviation-related sustainable development on the ground.

137. For industry associations, ICAO provides a useful baseline of policies and regulatory guidance that supports dialogue. However, stakeholders note that ICAO's focus is often too narrow—for example, concentrating on liberalization while neglecting broader issues such as consumer protection, taxation, or emerging market dynamics. When cooperation is anchored in concrete events, like negotiation forums, outcomes are clear and valuable. Yet outside these structured occasions, engagement tends to lose momentum and lacks continuity.

138. At the regional level, ICAO often relies heavily on other organizations to fill gaps in advocacy, monitoring, and implementation. In some African and South American contexts, ICAO has effectively delegated its economic development role to regional economic communities or associations. This approach allows ICAO to maintain a presence despite limited resources, but it dilutes its visibility and reduces its influence over

how priorities are set, unless the priorities of regional platforms are aligned with ICAO's. It also means that results vary widely depending on the strength and alignment of these regional partners.

Unintended results

139. ICAO's economic development initiatives have produced some unintended spillover effects, both positive and negative.

140. Positive spillovers included instances where ICAO's convening power generated collaboration beyond the intended scope. For example, regional dialogue in Asia-Pacific around liberalization frameworks led states to pursue joint initiatives even outside ICAO's direct oversight. Similarly, some African and Latin American stakeholders reported that participating in ICAO negotiation events encouraged them to accelerate bilateral agreements they might not otherwise have prioritized. In a few cases, the mere visibility of ICAO's engagement elevated aviation on national development agendas, helping attract foreign interest in infrastructure projects. ATB reported its support in 2025 to the Single African Air Transport Market (SAATM) initiative of the African Civil Aviation Commission (AFCAC), in the development of a Template for Economic Regulation for African States. In collaboration with the Regional Offices in Lima and Mexico, ATB also organized a capacity-building workshop in Panama for States under the two Regional Offices.

141. Capacity disparities created unintended effects. Smaller states in Africa and South America explained that while liberalization policies were promoted, they lacked the capacity to implement them, resulting in imbalances where larger, better-resourced markets benefited disproportionately. This generated frustration and a sense of exclusion.

> In Asia-Pacific, ICAO's work on economic development was designed to provide states with policy frameworks, workshops, and technical support to advance liberalization and connectivity. The intention was to strengthen national capacities and encourage the integration of ICAO guidance into aviation planning at the state level.
>
> What happened in practice, however, went further. States in the region, particularly within ASEAN, appropriated ICAO's tools and integrated them into their own agenda for the Single Aviation Market. This led to accelerated policy harmonization and regional liberalization that ICAO had not planned or directly monitored. Similarly, ICAO events created opportunities for dialogue and networking that spurred bilateral and regional agreements beyond the Organization's formal programme design.
>
> These developments were not part of ICAO's intended outputs or outcomes, but rather spillover effects of its convening power and technical guidance. They show how ICAO's role as a standard-setter can generate additional results when states actively take ownership, even though these results remain outside the scope of what ICAO directly planned or measured.

Efficiency

Findings 15	Without a results framework, it is difficult to assess efficiency. Although activities are implemented within the existing budget, ICAO needs to shift from activity-based to results-based budgeting to link resources to outcomes and measure the efficiency more adequately.

142. In the absence of a clear results framework, it is challenging to evaluate the efficiency of ICAO's work, as there is no structured link between activities, results, and resource use. While current activities are implemented within the approved budget, this activity-based budgeting approach limits the ability to assess value for money. A shift toward results-based budgeting—anchored in a solid results framework

with defined result chains and budget allocations—would enable meaningful measurement of efficiency and strengthen accountability for outcomes.

Financial resource

143. ICAO uses a regular budget to implement activities planned under the Economic Development of Air Transport Strategic Objective. Overall, this Strategic Objective consistently receives the smallest share of ICAO's overall regular budget.[47] In the case of Joint Financing, support is provided predominantly through cost-recovery arrangements, while certain leadership and support functions, including management oversight and broader Secretariat support, are funded from regular resources. In 2020, it accounted for 6.77 per cent of the total regular budget for Strategic Objectives, equivalent to just over 5.1 million Canadian dollars. By 2025 its share decreases slightly to 6.10 per cent, corresponding to around 5.26 million Canadian dollars. In absolute terms, funding for economic development remains relatively flat between 2020 and 2025, ranging narrowly from 5.1 to 5.2 million Canadian dollars. Out of total budget allocated for ATB, about 95 per cent was allocated for personnel. Budget allocated for operational support of Member States is very small.

Findings 16	The EDAT Strategic Objective receives the smallest share of ICAO's resources among all Strategic Objectives. While its percentage share has slightly declined, the monetary allocation has remained flat at approximately CAD 5.1–5.2 million. This budget is distributed across ATB (averaging 54%), regional offices (17%), and Programme Support Costs (29%). Not all allocated funds are utilized, with a portion frequently carried over. Furthermore, ATB has not drawn on its voluntary fund allocations and has not received any revenues generated from data sales, a situation widely perceived as a disincentive.

144. ICAO spent, on average, approximately 84 per cent of its allocated budget (average of CAD 5.1 million) and carry-overs (average of CAD 1 million) for the 2020–2024 period, improving the spending rate in 2024. The shortfall is primarily attributable to staffing gaps, notably the interval between personnel departures and subsequent appointments. Notably, resources mobilized through the Air Transport Fund (Voluntary Fund) have remained unused for the past four years. The Fund currently holds a balance of CAD 320,276.68, presenting a strategic opportunity to advance air transport initiatives. Proactively mobilizing funding through the Air Transport Fund and leveraging these resources would enable ICAO to strengthen Member States' capacity to implement critical air transport-related activities, thereby accelerating progress toward organizational objectives and enhancing global aviation resilience.

[47] ICAO, 2019. Document 10125. Budget of the Organization 2020-2021-2022
https://www.icao.int/sites/default/files/Meetings/a42/Documents/WP/wp_037_en.pdf
ICAO, 2022: Document 10174. Budget of the Organization 2023-2024-2025
https://www.icao.int/sites/default/files/publications/DocSeries/10125_en.pdf

Figure 14: ICAO's Regular Budget and Expenditure for Economic Development of Air Transport 2020 -2024

Bureau and Regional Offices	Budget	Per cent expenditure	Budget	Per cent expenditure	Budget	Per cent expenditure	Budget	Per cent expenditure	Budget	Per cent expenditure	Budget	Per cent expenditure
	2020		2021		2022		2023		2024		Total	
ATB	3,316,320	77.0	3,425,588	82.3	3,100,270	90.1	3,217,468	87.4	3,434,263	97.2	16,493,908	86.8
APAC	60,717	86.5	64,560	72.9	66,656	75.5	74,757	85.3	75,411	81.9	342,101	80.5
ESAF	166,983	73.1	171,578	61.6	171,489	75.8	255,904	73.5	157,378	83.8	923,331	73.4
EURNAT	166,574	81.1	160,708	71.0	168,863	79.3	306,019	87.6	305,180	99.5	1,107,345	86.2
MID	53,680	81.5	65,414	67.0	65,450	79.7	70,037	74.2	70,580	81.3	325,161	76.6
NACC	51,608	46.7	39,927	56.5	41,506	65.4	70,345	96.4	70,266	103.5	273,653	78.3
SAM	150,193	84.7	113,912	68.0	116,333	76.6	122,925	96.3	121,234	94.7	624,596	84.4
WACAF	317,133	20.4	319,172	64.7	316,525	74.3	327,813	89.9	340,417	63.3	1,621,060	62.7
Economic Dev - Programme Support	1,873,488	69.7	1,807,206	72.2	1,878,571	78.5	1,778,932	80.6	1,729,131	85.7	9,067,328	77.2
Grand Total	6,156,696	72.0	6,168,064.0	76.8	5,925,662.4	84.2	6,224,200.2	85.1	6,303,859.6	91.6	30,778,481.9	82.0
About 95% of ATB's budget is allocated for personnel (Staff and consultants)												
Source: FIN												

145. Besides, ATB, in its work under the Economic Development Strategic Objective, generates revenue for ICAO by selling data and developing training materials, yet none of that income is returned to the unit, leaving it under-resourced and disincentivized. Allocating even a modest share back could fund tools and talent, encourage innovation, and create a virtuous cycle of better products and higher revenue.

Human resource

Findings 17 The Air Transport Bureau has limited human resource capacity to implement activities under the EDAT SO and operates largely reactively. A small HQ team delivers a wide range of outputs efficiently, but resources remain misaligned with the scale of demand. Most Regional Offices lack dedicated personnel for this Strategic Objective, creating significant gaps in regional implementation support activities. Member States rated ICAO's efficiency in supporting economic development at an average score of 52.8, reflecting moderate satisfaction and highlighting persistent resource constraints.

146. The Air Transport Bureau (ATB), responsible for the delivery of the Economic Development Strategic Objective, is characterized by a human resources system that is fragile, limited in capacity, and reactive rather than proactive.

147. The model, essentially a patchwork system—flexible in moments of need, but unstable and reactive over time can be characterized as lean but overstretched. It depends on a small permanent cadre of experts, supplemented by ad hoc secondments and consultants, and lightly reinforced by regional officers who themselves often lack sufficient resources or have multiple mandates. This structure is cost-saving and allows ICAO to maintain a presence globally, but it does so at the expense of efficiency, consistency, and long-term sustainability. The fact that ATB cannot retain the revenue its data section generates, and that voluntary funds remain small, compounds the problem: it has more responsibilities than resources, and no clear growth path.

148. The evaluation finds that the human resources picture for ICAO's (ATB) reveals both the importance of the work and the fragility of the structures that support it. At headquarters, the bureau operates with a remarkably lean team given its global mandate. Under the director, two chiefs and an Officer are responsible for regulation, data, and joint financing, with eight additional technical staff and 5 general services staff, amounting to 15 staff in total, with 4 consultants for ADA team. There is no deputy director

in place, which saves valuable resources, but at the same time leaves a gap in leadership, direction and coordination, for example, for establishing and maintaining partnerships with other international organizations. This shortage forces the bureau to rely on consultants. Overall, the evaluation found that the workload is significant. ATB attempted to request an additional 6 professional posts, including a Deputy Director on Economic Development, in its zero-based-budgeting exercise, which has not been materialized.

149. The data and statistics branch within ATB demonstrates another side of the resource issue. This section has made significant advances in modernizing ICAO's data systems, shifting from traditional reporting methods to real-time, big-data analytics, incorporating AI tools and dashboards such as Tableau. These innovations feed directly into Council decisions and forecasting models that consider GDP, oil prices, and external shocks like COVID. Yet despite these advances, the unit faces a paradox: it generates revenue by selling data products to industry, but that revenue does not flow back to support the unit dealing with data itself. Instead, the team continues to operate with constrained budgets conducting only one or two training workshops per year for member states. This has improved reporting rates, but many states still lack the capacity to use data effectively for national aviation planning.

150. The regional offices play an increasingly important role in supplementing this thin capacity at headquarters. New Regional Officers have been deployed to Nairobi for Eastern and Southern Africa and to Dakar for Western and Central Africa, covering both air transport and overall coordination of technical assistance in these regions. In Lima additional support is provided through secondments, such as one from Brazil. These positions are intended to make ICAO's economic development work more tangible at the regional and national level. For example, training workshops in Lagos and the Latin America and Caribbean region have helped states understand how to apply ICAO's economic regulation templates. In Uganda, the regional office has supported the integration of air transport into the national development plan and the relaunch of Uganda Airlines. Côte d'Ivoire has embedded aviation into its own national strategy, with ICAO's regional presence seen as helpful in linking connectivity with tourism and trade.

Efficiency and timeliness in delivering services/outputs

151. The efficiency of the Air Transport Bureau in delivering services and outputs is highly uneven, showing strong results in some areas while struggling in others. The clearest example of efficiency comes from the International Civil Aviation Negotiation events. ICAN is consistently praised by states as a high-return investment. By gathering dozens of governments in one place, ICAN allows for hundreds of bilateral or multilateral negotiations to be conducted at a fraction of the cost and time that would otherwise be required. Smaller states in particular point to ICAN as one of the most cost-effective services ICAO offers, and countries such as Poland, Senegal, and São Tomé & Príncipe describe it as an indispensable tool for concluding agreements efficiently.

152. ICAO's joint financing arrangements are recognized as an efficient mechanism for delivering air navigation services and infrastructure, especially in regions with financial or operational constraints. The North Atlantic experience, notably through the Danish and Icelandic agreements, shows that pooling resources enables high-quality services at lower user charges. By sharing costs across States, joint financing eases individual financial burdens and supports the implementation of complex aviation infrastructure.

153. The bureau's data function is another area where efficiency has improved in recent years. The team, which is currently the highest in number compared to other teams, has shifted from traditional reporting to more modern approaches, using real-time analytics, AI, and dashboards. These tools enable better forecasting

and have allowed ICAO to provide timely insights to the Council and member states, especially during external shocks such as COVID-19.

154. At the regional level, capacity and efficiency vary considerably. In South America, the regional office struggles because there is no regular budget for economic development work. Activities depend on voluntary contributions, which delays outputs and makes delivery unpredictable. States in the WACAF region often turn to regional bodies for quicker or more visible support, leaving ICAO's contributions limited to sporadic events or training sessions. When ICAO does deliver, states complain that training often arrives too late to inform actual policy decisions. In Eastern and Southern Africa, staffing limitations mean that ICAO's efficiency depends largely on partnerships with others rather than on its own resources. By contrast, in the Middle East, the regional office has been seen as efficient during crises such as COVID-19, when ICAO responded with timely traffic monitoring and guidance. Outside of crisis situations, however, most activities are reactive and often attached to other events, reflecting a lack of capacity for independent initiatives.

155. Partners and states also highlight the inefficiencies created by slow processes and bureaucratic hurdles. A UN partner notes that it takes years to finalize agreements with ICAO, in part because there is no single focal point for coordination. From the perspective of member states, some find ICAO efficient when it runs targeted, expert-level discussions, but others complain about slow response times and burdensome surveys. European states often find ICAO's processes too slow compared to regional systems like the EU's, which can adapt more quickly and enforce decisions.

156. The primary data and regional evaluations show that ICAO's Regional Offices plan and track activities against Business and Operating Plans through corporate tools (CMRT/CPMR). However, the evidence for timeliness is weak. In many cases, the HQ Operational Plan tracking system records activities only as "completed," without indicating whether they were delivered on time or delayed.

157. This creates significant verification problems. In the MID evaluation[48], for instance, the report notes "major challenges when tracking achieved results vs planned targets," since many entries lacked baselines, bundled multiple outputs together, or gave no clear time-stamped proof. As a result, work programmes often function more as calendars of events than as time-bound results frameworks.

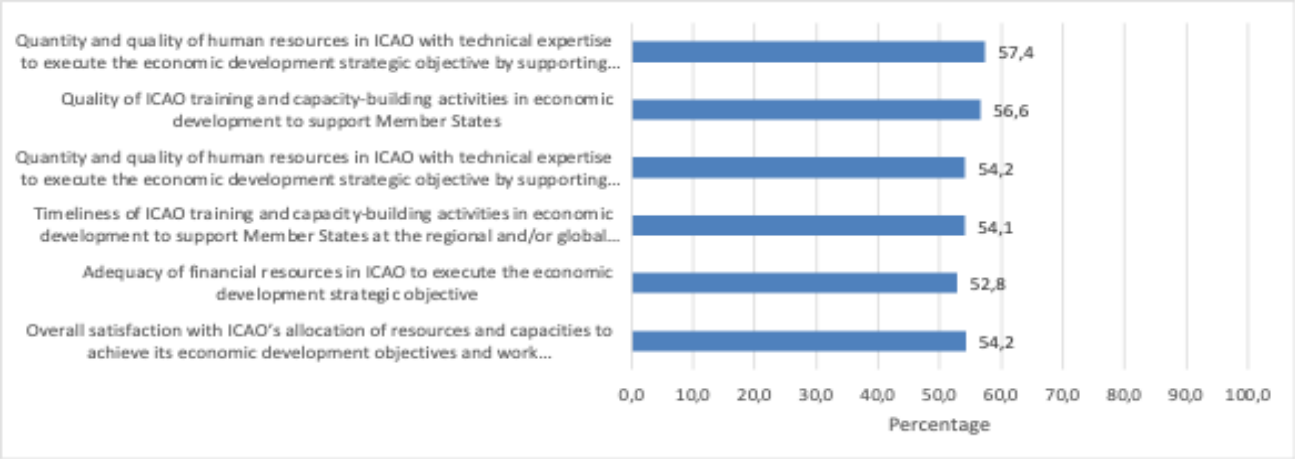
158. Some evidence does suggest punctual delivery. In NACC, four activities in the 2020–2022 period (e.g. regional safety planning, COVID recovery support, timely crisis response) were confirmed as implemented in line with the plan. But for several other activities, the evaluation found "inadequate evidence" of full implementation or timely delivery, largely due to gaps in monitoring data[49].

REGIONAL AND MEMBER STATE PERSPECTIVES

159. According to Figure 15, 57.4 per cent of respondents consider ICAO's technical expertise and staffing to be adequate, while 56.6 per cent value the organization's training and capacity-building initiatives. Similarly, 54.1 per cent of Member States are satisfied with the timeliness of ICAO's support. However, only 52.8 per cent find ICAO's financial resource allocation sufficient, highlighting persistent funding constraints and the organization's reliance on voluntary contributions.

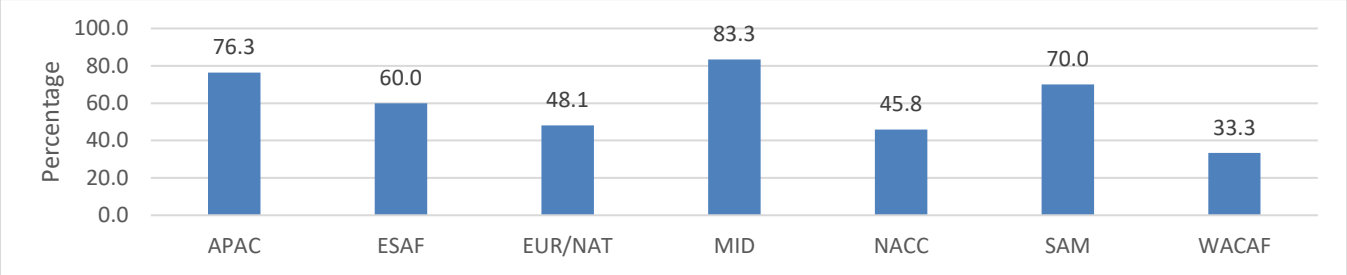
[48] ICAO, 2024: Evaluation of the Regional Portfolio of the MID Office
[49] ICAO, 2023: Evaluation of the Regional Portfolio of the NACC Office

Figure 15: Efficiency criteria for the implementation of the Strategic Objective on Economic Development (n=53)



160. Figure 16 illustrates significant regional disparities in satisfaction levels about ICAO's resource allocation and technical delivery on its Economic Development Strategic Objective. The Middle East (MID) shows the highest satisfaction rate at 83.3 per cent, followed by the APAC region at 76.3 per cent. SAM reports relatively strong confidence at 70.0 per cent, while ESAF records moderate satisfaction at 60.0 per cent. In contrast, EUR/NAT at 48.1 per cent and the NACC region at 45.8 per cent show lower levels of confidence, with WACAF registering the lowest satisfaction at just 33.3 per cent.

Figure 16: Regional perspectives on the efficiency of implementing the Strategic Objective on Economic Development (n-53)



Sustainability

Sustainability Strategy

Finding 18: Overall, ICAO's treatment of sustainability under the Economic Development Strategic Objective is fragmented. While sustainability is acknowledged and some initiatives support it, there is no clear organization-wide sustainability strategy embedded into ICAO planning, implementation, and monitoring under the Strategic Objective.

161. A recent ICAO high-level review (ICAO, 2023)[50] found that ICAO lacks a coherent, well-resourced strategy to guide its economic development work and link it systematically to the SDGs. Awareness of aviation's development role is low among both staff and Member States, limiting the uptake of ICAO guidance.

[50] ICAO, 2023: High-Level Review of ICAO's Contribution to the Sustainable Development Goals (SDGs)

Resources dedicated to this area remain scarce, and support for vulnerable States has not been fully institutionalized.

162. This is confirmed by this evaluation. There is no stand-alone or fully integrated sustainability strategy specifically guiding the Economic Development Strategic Objective. Instead, sustainability appears in fragments and through indirect linkages.

163. In planning, ICAO's Business Plans and Operating Plans refer to sustainability, but mainly in the context of environment, safety, or efficiency. For Economic Development, sustainability is not presented as a dedicated strategy. There are references to embedding aviation into broader national development planning and aligning with the Sustainable Development Goals, but these remain general policy signals rather than structured commitments.

164. In monitoring, ICAO collects some indicators, for instance, on passenger and freight volumes under SDG 9.1.2, and it references sustainability within its results frameworks. However, there is no systematic monitoring tool that consistently tracks the sustainability of economic development activities across all regions. Member States often point to the absence of consistent sustainability metrics and accountability in this area.

Capacity building to support sustainable operations

Finding 19: ICAO continues to play a role in capacity building, offering programmes, toolkits, and bilateral assistance to help Member States integrate the results of ICAO support into aviation planning. Training efforts are strengthening skills in greener operations, sustainable fuels, and climate-related economic regulation. Member States report moderate satisfaction (63%) with this capacity-building support.

165. ICAO has been supporting sustainability through a range of structured capacity-building initiatives. The No Country Left Behind initiative and the targeted iPacks have further enabled regulators and operators, particularly in smaller or developing states, to recover sustainably from COVID-19. Data tools and forecasting instruments, including proposed impact dashboards and national contribution indices, are also being developed to help governments track performance. In addition, ICAO's regional integration platforms, such as ICAN, are being used to open connectivity corridors that reduce costs and emissions. Toolkits and planning frameworks are being advanced to help governments formally embed aviation sustainability into national plans.

166. Training is another key pillar of ICAO's sustainability strategy. However, most of the trainings organized by GAT and its partners on Air Transport are conducted online, which may limit opportunities for face-to-face interaction and hands-on learning. Currently, there are 19 virtual trainings available. While this format improves accessibility and flexibility, it may not fully address the need for collaborative engagement and practical exercises essential for skill development.

167. Workshops and learning programmes are focusing on themes such as sustainable aviation fuel supply-chain management, green airport operations, ESG-aligned infrastructure and climate-conscious regulation. Economic regulation workshops in EUR–NAT and Türkiye have highlighted the links between competition policy, charges and sustainability goals. In the APAC region, post-COVID recovery courses are being tied to the CART recommendations. Smaller states and SIDS have been prioritised with tailored training on data analytics, forecasting and sustainability metrics, recognising their limited regulatory capacity. Across regions, there is consistent demand for skills that link day-to-day aviation operations with broader

environmental and economic transition objectives. The box below provides insights into workshops in the MID and NAAC region, based on recent regional evaluations[51].

MID:
2020–2021: Webinars on CART Recommendation 10 (Economic and Financial Measures) and ICAO's Take-Off Guidance for Air Travel (TOGD) during COVID-19.
2022: Statistics and Forecasting Workshop (organized with ICAO HQ/ATB) to strengthen analytical capacity.

NAAC:
2017-2023: Context-specific workshops and trainings linked to economic development (forecasting, planning, donor engagement), embedded in Systemic Assistance Programme missions.

Support to strengthen the enabling environment to sustain change

Finding 20: There is progress in the integration of ICAO policies and guidance into Member State policies and procedures, for example, national development strategies. Member States' and authorities' satisfaction with the adequacy of ICAO's work and activities to facilitate integration of aviation into National economic / development policies/plans reaches 66.7%.

168. Many Member States have already embedded ICAO policies into national frameworks. Economic guidance from ICAO documents like Doc 9587 and Doc 9082 is being incorporated into national recovery plans and regulatory frameworks in several countries, for example, in ESAF.

169. Recent evaluative evidence points to the dissemination and application of CART recommendations and ICAO TOGD guidance in MID in 2020 and 2021[52]. Several governments are also embedding aviation more directly into their national development and infrastructure strategies, ensuring sustainability metrics are linked to growth objectives. Integration is also evident at the operational level, with airport and cargo modernization projects, such as those in Kuwait, tying environmental compliance to infrastructure upgrades.

170. Despite these advances, ICAO's ability to sustain long-term economic development initiatives faces several operational constraints. The organization's dependence on voluntary contributions creates uncertainty in funding, undermining continuity and limiting its capacity to maintain consistent programmes. Staffing constraints, especially in the Air Transport Bureau and Regional Offices, increase workloads and reduce efficiency, while reliance on secondees for critical roles introduces risks when institutional knowledge is lost at the end of contracts. Data management is another pressing issue. Although initiatives such as ICAN have proven highly effective, ICAO's broader sustainability data collection and reporting systems remain slow and inconsistent. Limited automation and reliance on commercialized databases restrict access for lower-income states, reducing equity and comparability across regions. Limited resource allocation to Regional Offices contributes further to fragmented implementation, with some regions facing delivery gaps due to limited budgets and personnel. Finally, ICAO's partnerships face continuity risks due to internal staff

[51] ICAO, 2024: Evaluation of the Regional Portfolio of the MID Office
ICAO, 2023: Evaluation of the Regional Portfolio of the NACC Office
[52] ICAO, 2024: Evaluation of the Regional Portfolio of the MID Office

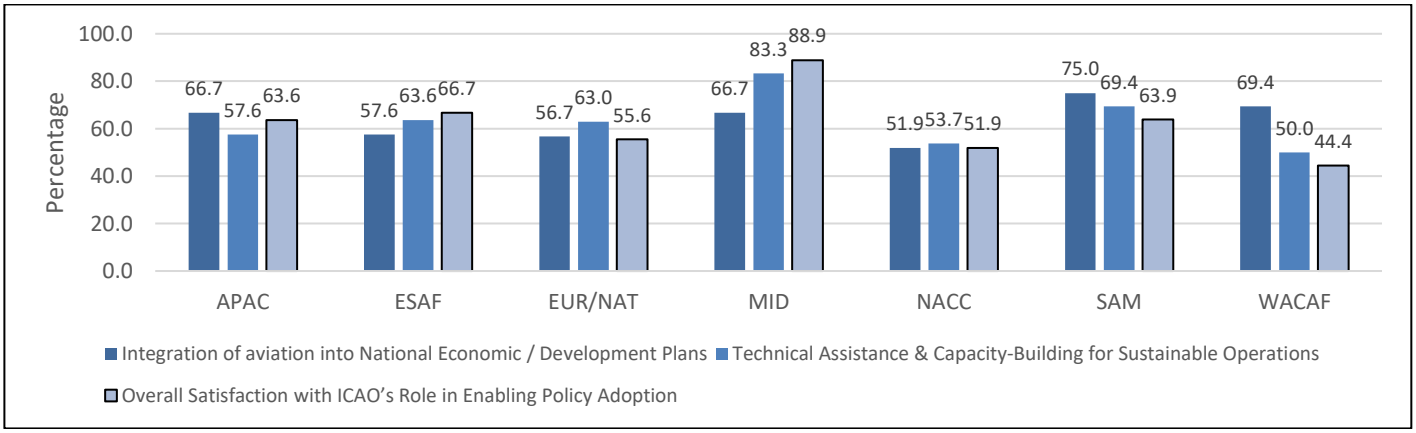
turnover, while stronger collaboration with UN partners is essential to improve data access, enhance policy development and strengthen readiness for emerging aviation challenges.

171. Figure 17 highlights significant differences across regions in terms of policy integration, technical assistance, and overall satisfaction with ICAO's role in enabling sustainable economic development in aviation. Stakeholders in the MID region view the sustainability of ICAO's work on economic development more positively than in any other region. This finding is supported by Figure 17 showing 88.9 per cent overall satisfaction, 83.3 per cent approval for technical assistance and capacity building work to ensure sustainable aviation operations, and 66.7 per cent adequacy of ICAO's work and activities to facilitate integration of aviation into national economic / development policies/plans. This reflects strong uptake of ICAO tools, coordinated planning, and effective capacity-building. The region benefits from harmonized policies and strategic adoption of ICAO frameworks, enabling consistent progress in sustainable aviation practices.

172. APAC shows strong engagement, 66.7 per cent satisfied with the adequacy of ICAO's work and activities to facilitate integration of aviation into national economic / development policies/plans, and 63.6 per cent satisfaction with technical assistance and capacity building work to ensure sustainable aviation operations, though overall satisfaction is lower at 57.6 per cent. The region leads in adopting long-term climate targets and resilience-building measures, but progress is challenged by high costs for sustainable aviation fuels, balancing economic growth with environmental obligations, and external disruptions such as market volatility and geopolitical factors.

173. SAM demonstrates positive results, achieving 75 per cent satisfaction with the adequacy of ICAO's work and activities to facilitate integration of aviation into national economic / development policies/plans, 69.4 per cent satisfaction with technical assistance, and 63.9 per cent overall satisfaction. This reflects significant progress in policy alignment and climate-driven planning. However, sustaining momentum will require continued institutional support, additional funding, and strengthened capacity-building measures to close remaining implementation gaps.

Figure 17: Sustainability aspects of ICAO's work on the Economic Development Strategic Objective (n=55)



174. ESAF shows moderate results concerning sustainability perceptions, with 57.6 per cent satisfaction with the adequacy of ICAO's work and activities to facilitate integration of aviation into national economic / development policies/plans, 63.6 per cent satisfaction with technical assistance and capacity building work to ensure sustainable aviation operations, and 66.7 per cent overall satisfaction. While progress is visible in

areas such as liberalization, sustainability remains constrained by limited funding, institutional capacity gaps, and workforce shortages. The region's ability to accelerate implementation depends on enhanced technical support, stronger alignment with ICAO strategies, and better access to planning tools and financing mechanisms.

175. EUR/NAT presents a mixed picture, with 56.7 per cent satisfaction with the adequacy of ICAO's work and activities to facilitate integration of aviation into national economic / development policies/plans, 63 per cent satisfaction with technical assistance, and 55.6 per cent overall satisfaction. While several members lead on Sustainable Aviation Fuel (SAF) adoption and LTAG implementation, progress is hindered by competing frameworks, regulatory fragmentation, and high transition costs, particularly in balancing ICAO's global policies with EU-driven measures. The region continues to advance innovation and climate-aligned planning but faces complex coordination challenges.

176. NACC shows uneven results, with 51.5 per cent satisfaction with the adequacy of ICAO's work and activities to facilitate integration of aviation into national economic / development policies/plans, 53.7 per cent satisfaction with technical assistance and capacity building work to ensure sustainable aviation operations, and 51.9 per cent overall satisfaction. While some members have successfully adopted ICAO frameworks and focused on recovery strategies, others face financial constraints, institutional fragmentation, and limited capacity to manage sustainability transitions, especially in Central America and the Caribbean. Smaller states in particular require targeted technical assistance and improved policy harmonization to strengthen long-term outcomes.

177. WACAF has the lowest overall sustainability ratings, with 69.4 per cent satisfaction with ICAO's work and activities in supporting the integration of aviation into national economic and development policies and plans, 50 per cent satisfaction with technical assistance, and 44.4 per cent overall satisfaction. Figure 17 highlights systemic challenges, such as weak integration of ICAO frameworks into national plans, significant funding limitations, infrastructure gaps, and heavy dependence on external partners. The region needs substantial institutional strengthening, targeted investments in technical expertise, and improved capacity-building mechanisms to advance toward sustainability goals.

178. Figure 18 provides more detailed insights into regional and country-level challenges concerning the sustainability of the economic development of air transport.

Figure 18: Challenges to the sustainability of the economic development of air transport in ICAO member States and Administrations

Region	Key Sustainability Challenges
APAC	• High costs for SAF and decarbonization; significant climate impacts; financing constraints and weak data systems; • Capacity gaps and aviation workforce shortages geopolitical instability and economic volatility; • Supply chain disruptions and aircraft delivery delays inconsistent regulatory frameworks and pushback against liberalization; COVID-19 recovery delays across several states.
ESAF	• Severe funding shortages; • High costs of SAF adoption; fragmented regulatory frameworks and limited technical expertise; lack of localized ICAO experts leading to "one-size-fits-all" policies; • Insufficient financial and institutional support systems for small states; • Double taxation increasing ticket prices; • Shortage of skilled personnel and missed partnership opportunities; • Weak legal and financial structures undermining capacity-building.
EUR/NAT	• High SAF production costs and scaling challenges; workforce shortages and training gaps; • Conflicts between environmental targets and economic growth;

	• Competing ICAO and regional regulatory frameworks causing policy fragmentation; slow implementation timelines and inconsistent coordination; financing barriers for smaller states; economic instability and post-COVID recovery constraints.
MID	• Uneven infrastructure development and capacity disparities between states; • Lack of harmonized regulatory frameworks; • Environmental pressures driving higher operational costs; • Fragmented sustainability policies with over-reliance on ad hoc initiatives rather than structured regional strategies.
NACC	• Financial constraints and limited revenue reinvestment into aviation; • Fragmented policy frameworks and institutional misalignment; • Small-state vulnerabilities including resource scarcity and limited technical capacity; • Inconsistent taxation policies affecting sustainability implementation; pandemic-driven operational disruptions; insufficient harmonization between airlines, airports, and national frameworks, slowing progress toward ICAO goals.
SAM	• Investment shortages for sustainable aviation infrastructure; • Fragmented policies across states slowing integration; • Slow regulatory adaptation and barriers to foreign investment; • Limited cargo liberalization and balancing passenger rights with operator needs; • Financial instability affecting sustainability transitions; • Protectionist tendencies weakening regional harmonization with ICAO frameworks.
WACAF	• Poor infrastructure and underdeveloped aviation systems; • Limited technical expertise and insufficient training systems; • Lack of sustainable funding and weak institutional frameworks; • High fuel costs affecting airline competitiveness; • Inadequate safety oversight and limited workforce readiness; • Strong dependence on external partners and regional organizations for sustainability planning.

Cross-cutting Criteria

Finding 21: ICAO's work on the Economic Development Strategic Objective increasingly intersects with broader priorities such as gender inclusion, environmental sustainability and social equity, but mainstreaming remains inconsistent across regions, regulatory outputs, and partnerships.

179. At the strategic level, ICAO leadership recognizes that economic development can act as an enabler of cross-cutting goals when these dimensions are embedded early in project design. While there are growing efforts to align economic development with environmental objectives—particularly through initiatives such as market-based measures and long-term emissions targets—the systematic integration of gender inclusivity and labor considerations remains limited. This gap suggests that sustainability strategies often overlook social dimensions, which are critical for achieving equitable and comprehensive outcomes. ICAO's approach to mainstreaming gender in economic development is limited to collecting and generating sex-disaggregated data and one high-level event, with little evidence of sustained, policy-embedded actions and no explicit disability-specific measures.

180. Primary data collected during the evaluation suggest that at the regional level, cross-cutting priorities tend to surface only when Member States raise them directly, rather than being consistently mainstreamed. In some cases, environmental and facilitation linkages are discussed at events, but there is little evidence of structured or ongoing mechanisms to ensure these considerations are built into planning and implementation.

181. Feedback highlights that ICAO's data collection has begun to capture aspects of gender and inclusivity, but broader socio-economic and workforce issues—such as labor rights, skills development, and human resource dynamics—are underrepresented. The absence of updated guidance on related themes, including human rights and passenger protections, further reduces ICAO's ability to address these issues in a forward-looking way. The evaluation did not find evidence about ICAO's impact on the affordability of tickets.

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

Relevance

182. Conclusion 1: ICAO's Economic Development Strategic Objective is widely valued but perceived unevenly, reflecting a gap between global offerings and the diverse expectations of Member States. Industrialized economies tend to prioritize tailored analytics, facilitation mechanisms, and pragmatic bilateral support, while developing economies focus more on enhancing connectivity, securing financing, and building institutional capacity. (Linked to Findings 1, 11)

183. Conclusion 2: Initiatives like ICAN demonstrate that ICAO's value and relevance are strongest when services are targeted, practical, and responsive to Member State needs. However, delays in operationalizing new priorities weaken institutional agility and create a gap between strategic intent and implementation. Without faster integration of new resolutions, programming risks becoming outdated, especially in fast-evolving areas such as taxation and economic regulation. (Linked to Findings 1, 2 and 8)

184. Conclusion 3: While ICAO has shown strong global leadership and crisis responsiveness, uneven regional follow-through has limited the sustainability and equitable impact of its efforts. Strengthening regional delivery mechanisms and ensuring continuous engagement would enhance the long-term effectiveness of the Economic Development Strategic Objective and maintain Member State confidence in ICAO's ability to respond to emerging challenges. (Linked to Findings 3 and 8)

Coherence

185. Conclusion 4: ICAO's economic development programmes provide valuable policy frameworks and technical inputs, but the absence of binding SARPs limits their systemic impact and consistency of application. Without enforceable mechanisms, guidance remains largely voluntary, resulting in uneven adoption and limited convergence among Member States. Over time, this weakens ICAO's influence on the economic development of air transport compared to areas such as safety and security, where compliance frameworks are stronger. (Linked to Finding 4)

186. Conclusion 5: Institutional fragmentation across bureaux further undermines coherence and reduces ICAO's capacity to deliver integrated, cross-cutting policy guidance. The perception of weak data quality, limited feedback loops, and inconsistent monitoring erodes ICAO's credibility as a trusted source of economic intelligence. Externally, insufficient coordination with other international and regional organizations leads to mixed messaging and diluted influence. Strengthening internal integration, improving data systems, and enhancing collaboration with external partners would be critical steps toward restoring coherence and reinforcing ICAO's strategic influence in this domain. (Linked to Findings 5, 6 and 8)

Effectiveness

187. Conclusion 6: ICAO's Economic Development Strategic Objective lacks a clear results framework, defined outcomes, outputs and indicators, and a programmatic framework to track progress on the Strategic Objective, while performance continues to be measured by activity completion rather than by strategic results. Though not always adequate, operational activities were planned and monitored in the CPMR, and ICAO demonstrated strong short-term delivery, but the absence of comprehensive performance data for 2020–2022 and weak

results-based management practices limited the ability to assess long-term effectiveness and cumulative impact. (Linked to Findings 6, 7 and 15)

188. Conclusion 7: The joint financing mechanism, in its current North Atlantic–focused form, remains effective within its original operational context but has limited relevance as a corporate instrument for addressing today's broader economic development and financing needs of Member States. While its contribution to ICAO's broader Economic Development Strategic Objective remains limited, its strategic relevance could be strengthened through clearer positioning, modernization, and selective expansion to address broader financing needs where appropriate, supported by more systematic reflection in monitoring and reporting. (Linked to Finding 12)

189. Conclusion 8: ICAO's liberalization agenda remains strategically relevant but lacks operational agility. Slow adaptation to emerging economic issues and insufficient integration of statistical analysis into policymaking have constrained its ability to shape liberalization outcomes proactively. Consequently, ICAO is often viewed as a reactive rather than a leading force in advancing economic innovation and regulatory modernization. (Linked to Findings 8 and 11)

190. Conclusion 9: While ICAO has raised global awareness of passenger protection, progress remains uneven, particularly in developing Member States that lack the capacity to enforce frameworks. The absence of model legislation, harmonized guidance, and tailored capacity-building limits implementation and weakens global consistency. Similarly, although ICAO has embedded aviation within national development agendas through its policy and advocacy work, its contribution remains largely normative. Member States increasingly seek practical toolkits, technical assistance, and implementation support to operationalize aviation as a driver of sustainable growth. Finally, ICAO's economic regulatory frameworks, such as Docs 9082 and 9587, are widely valued but hampered by slow updates, uneven regional adoption, and voluntary compliance—factors that reduce their effectiveness and alignment with evolving national and global priorities. (Linked to Findings 9, 10 and 14)

191. Conclusion 10: Aviation data and analysis represent one of ICAO's strongest contributions to Member States, supporting long-term planning, crisis response during COVID-19, infrastructure investment decisions, and alignment with environmental objectives such as LTAG 2050. However, stakeholders across all regions consistently highlight limitations related to the timeliness, granularity, and accessibility of the data products, which constrain their full operational and policy value. (Linked to Findings 8, and 14)

192. Conclusion 11: ICAO demonstrates strong effectiveness in setting global policy and regulatory frameworks, developing and updating core guidance materials, advocating for key priorities, and providing data and statistics to support long-term planning and crisis management, including through platforms such as ICAN. While ICAO's contributions are most significant at the normative and policy levels, its operational influence remains limited and uneven across regions. This underscores the need for more tailored, practical, and operational support to Member States and regional entities. (Linked to Findings 4, 8 and 10)

Efficiency

193. Conclusion 12: In the absence of a results framework and results-focused budgeting, ICAO cannot meaningfully assess the efficiency of its work on the Economic Development Strategic Objective. The flat absolute budget largely for policy level work to ICAO's Economic Development Strategic Objective between 2020 and 2025 highlights a disconnect between strategic intent and operational resourcing, resulting in the inadequacy of the budget to operationally support Member States based on their needs and demands. Although around two-thirds of Member States who responded to the survey view this objective as important, funding and staffing have not kept pace with ICAO's ambitions or Member State expectations. This resource

mismatch constrains the ICAO's ability to set a proactive agenda, respond to emerging priorities, and sustain institutional performance. (Linked to Findings 15 and 16)

Sustainability

194. Conclusion 13: ICAO's Economic Development Strategic Objective is normatively strong but lacks the operational capacity to sustain and scale results. The absence of a clear, organization-wide sustainability strategy embedded within this objective limits coherence, visibility, and impact, leaving ICAO reactive rather than strategic in supporting Member States. (Linked to Findings 8 and 18)

195. Conclusion 14: While ICAO's capacity-building model is relevant and appreciated, it remains insufficiently institutionalized and scaled to drive lasting transformation in Member States. Progress in integrating ICAO's economic development policies into national strategies demonstrates normative influence and technical value, but results remain uneven across regions and thematic areas due to fragmented implementation. (Linked to Findings 19 and 20)

196. Conclusion 15: The growing convergence between economic development and cross-cutting priorities—such as environment, social equity, and gender—offers ICAO an opportunity to strengthen its strategic relevance and global leadership. However, the lack of systematic integration mechanisms prevents these linkages from being leveraged organization-wide, making progress dependent on isolated initiatives rather than coordinated, strategic action. (Linked Finding 21)

Recommendations

197. Recommendation 1: Aligned with the ICAO Strategic Plan 2026–2050, ATB should develop an improved integrated results framework for the Economic Development Strategic Goal with clear outcomes and, outputs, indicators, responsibilities and related monitoring, reporting and evaluation provisions. As part of this work, ATB should clarify the role of the Joint Financing function within the broader Economic Development framework, ensure that it is appropriately reflected in planning, monitoring and reporting, and assess options to modernize and selectively expand its contribution to broader financing needs where appropriate. (Linked to Findings 6, 7, 12 and 15; Conclusions 6 and 7)

Priority	Time implication	Budget implication
Medium	March 2027	High

Closure guidance: Integrated results framework for the Economic Development Strategic Goal. Review of Joint Financing approach to contribute to other ICAO works.

198. Recommendation 2: ATB, in collaboration with CDI and the Regional Offices, should conduct a functional review of the implementation support modalities to achieve the Economic Development Strategic Goal, assessing staffing, skillsets and workflows, and funding and resource-allocation constraints across the Headquarters and Regional Offices. Based on the review, ATB and CDI should design and implement a resourcing and delivery mechanism that clarifies implementation responsibilities and regional support arrangements and identifies feasible resourcing options to strengthen its tailored support to the Member States. (Linked to Findings 1, 12, 15 and 16; Conclusions 7 and 12)

Priority	Time implication	Budget implication
High	December 2027	Medium

Closure guidance: Updated delivery mechanism with clear resourcing options in place.

199. Recommendation 3: Aligned with the ICAO Strategic Plan 2026–2050, ATB, in collaboration with the Aviation Data and Analysis Panel, should develop a mechanism to strengthen ICAO aviation data as a strategic enabler for Member State decision making, by improving the timeliness, accessibility, and relevance of ICAO data products, as well as by enhancing partnerships for data sharing. This could include clear corporate commitments for regular and timely data release, equitable and predictable access to core datasets (e.g. traffic, connectivity, SDG indicators), and closer alignment of data products with differentiated regional and national policy and planning needs. (Linked to Findings 3, 5, 6, 8 and 18; Conclusions 5 and 10)

Priority	Time implication	Budget implication
High	December 2027	Medium

Closure guidance:

i. Mechanism in place and operational, with defined commitments for timely and regular release of core ICAO aviation datasets and equitable access for all Member States.

ii. ICAO aviation data products demonstrate clear alignment with differentiated regional and national policy and/or planning needs, supported by documented user engagement or feedback.

200. Recommendation 4: In collaboration with Panels, ATB should assess identify and develop quasi-regulatory instruments (e.g., model regulations, voluntary codes, implementation scorecards) needed by Member States to strengthen the normative pull of ICAO's economic guidance in the absence of SARPs and introduce

regular reporting or peer-review mechanisms to monitor Member State uptake, fostering transparency and peer pressure. (Linked to Findings 4, 8, 9, 10 and 14; Conclusions 4, 9 and 11)

Priority	Time implication	Budget implication
Medium	December 2027	Medium

Closure guidance: Launch of quasi-regulatory instruments

201. Recommendation 5: ATB should adopt a results-oriented liberalization package[53] that emphasizes practical, bilateral-level facilitation and links ICAO's normative instruments to hands-on delivery (e.g., modernize and embed economic data and negotiation tools into State decision cycles; update and expand TASA tools and model clauses; provide region-specific capacity-building etc.). (Linked to Findings 4, 8, 10 and 11; Conclusions 8 and 11)

Priority	Time implication	Budget implication
Medium	December 2028	High

Closure guidance: Results-oriented liberalization package launched

Lessons learned

Lesson Learned 1: Fast Tracking New Assembly Decisions with Clear Accountability: To ensure timely and effective implementation of decisions arising from Assemblies, it is critical to institutionalize mechanisms that support rapid integration of new resolutions into organizational work programmes. This includes establishing structured, time-bound procedures for updating work plans, supported by a resolution tracking dashboard to monitor progress, assign clear accountability, and communicate updates transparently across teams. Additionally, emerging themes should be prioritized early, with provisional resources allocated immediately after Assemblies to avoid implementation delays and ensure that new priorities are reflected in operational activities.

Lesson Learned 2: Integration of Workstreams, Modernization of Open Data, and Deepening Partnerships: Effective implementation requires structured inter-bureau coordination (e.g., joint workplans and thematic task forces) to align economic, safety, security, and environmental workstreams. Sustained impact also depends on modern, open data systems—continuing investments in timely, user-friendly, publicly accessible economic datasets, streamlining surveys, and strengthening two-way consultation to rebuild stakeholder confidence. Finally, results are amplified by proactive external partnerships, engaging key international and regional partners through joint initiatives, data-sharing, and coordinated advocacy to enhance coherence and reach.

Lesson learned 3: ICAO as a Strategic Catalyst and Capacity-Builder: Positioning ICAO as a strategic catalyst and capacity-builder is essential to enhance States' ability to integrate aviation into broader national agendas. Developing toolkits, implementation guides, and targeted assistance programmes enables States to embed aviation within economic, infrastructure, and sustainability planning frameworks, fostering stronger national ownership, alignment with development priorities, and more sustainable sectoral growth.

[53] A results-oriented air transport liberalization package refers to a structured set of policies, tools, and facilitation measures designed to help States progressively open their air transport markets while focusing on measurable outcomes such as improved connectivity, fair competition, and economic benefits. Unlike traditional liberalization approaches that emphasize agreements alone, a results-oriented package integrates implementation support, monitoring, and capacity-building to ensure tangible impact.

Lesson learned 4: Keep Frameworks Current, Aligned, and Enabling: Accelerated regulatory and policy updates—aligned with regional and national strategies and backed by expanded capacity-building and data-driven tools—are pivotal for uptake and impact. Faster revision cycles, systematic dissemination, and targeted regional support help ensure frameworks remain current, actionable, and consistently implemented across diverse contexts.

Lesson learned 5: Strategically and Systematically Embedded Sustainability: Developing and adopting an ICAO-wide sustainability strategy—explicitly linked to the Economic Development Strategic Objective—helps set clear objectives, priorities, and performance indicators that guide coherent action across the Organization. Expanding and deepening the sustainability of capacity-building programmes by shifting from stand-alone trainings to structured learning pathways and long-term institutional partnerships strengthens the durability of results. Robust follow-up mechanisms, such as communities of practice and alumni networks, further reinforce the application of knowledge post-training. In parallel, consolidating and scaling integration support for Member States in need through structured policy advisory services enables States to systematically embed ICAO guidance into their national development plans, ensuring lasting impact.

Lesson learned 6: Value of systematically Mainstreaming Cross-Cutting Themes and Leveraging Specialized Partnerships: Establishing internal guidance and tools—such as checklists and mainstreaming frameworks—ensures cross-cutting themes are embedded consistently in project design, regulatory development, and partnerships. Complementing this with stronger partnerships across specialized agencies and stakeholders (e.g., UN Women, UNEP, regional development banks) enables co-development of integrated programmes that draw on targeted expertise and deliver more coherent, scalable results.

ANNEX 1: MANAGEMENT ACTION PLAN

Ref	Recommendation	Priority Rating	Accepted (Y/N)	Management Comments	Agreed Actions	Office/ Section Responsible	Target Date
1.	Aligned with the ICAO Strategic Plan 2026–2050, ATB should develop an improved integrated results framework for the Economic Development Strategic Goal with clear outcomes and, outputs, indicators, responsibilities and related monitoring, reporting and evaluation provisions. As part of this work, ATB should clarify the role of the Joint Financing function within the broader Economic Development framework, ensure that it is appropriately reflected in planning, monitoring and reporting, and assess options to modernize and selectively expand its contribution to broader financing needs where appropriate.	Medium	Yes	ATB will strengthen results-based management for the Economic Development Strategic Goal by incrementally improving how existing Strategic Plan, Business Plan, TOP and PMF structures are applied, taking into account the non-normative and largely qualitative nature of ICAO's economic work, which relies on guidance rather than SARPs or annexes. In practice, ATB will clarify the Economic Development results chain by better aligning current activities with intended outcomes and outputs, identifying a limited set of pragmatic and mostly qualitative indicators, and improving consistency of roles and reporting across Headquarters and Regional Offices within existing planning and reporting cycles. Joint Financing (JF) The Section acknowledges the need to further strengthen the integrated results-based management framework for the Economic Development Strategic Goal, including its outcomes, outputs, indicators, and performance measurement mechanisms. Historically, due to its distinct governance and cost-recovery funding model, the JF function was	ATB, in coordination with SPMO and Regional Offices, will strengthen results-based framework for the Economic Development Strategic Goal by better aligning current activities with intended outcomes and outputs, identifying a set of pragmatic and qualitative indicators, and improving consistency of roles and reporting across Headquarters and Regional Offices within existing planning and reporting cycles. JF Section will develop and implement an integrated RBM framework, including defined outcomes, outputs, indicators, and performance monitoring mechanisms. A structured review of the JF Section function will also be conducted in consultation with the Joint Support Committee	ATB/ECD ATB/JF	31 March 2027 30 June 2027

Ref	Recommendation	Priority Rating	Accepted (Y/N)	Management Comments	Agreed Actions	Office/ Section Responsible	Target Date
				not integrated into the Regular Budget planning or results-based management framework. While this did not preclude integration into the strategic framework, it may have contributed to a mistaken perception of reduced relevance. Going forward, JF contribution will be reflected within the RBM framework at the outcome level. This approach ensures that JF Section is integrated into ICAO's results framework while respecting its distinct governance and funding model. In this regard, efforts will be undertaken to align JF with other Sections that were previously integrated into the Business Plan. The proactive expansion or adaptation of the JF function to emerging financing needs and joint programmes, such as the previous work undertaken in support of the space weather cost recovery initiative, will remain subject to the availability of resources and funding.	and relevant stakeholders to assess its continued relevance and strategic positioning, and opportunities to enhance its contribution to ICAO's Goals, including through targeted regional assessments and improved the visibility in ICAO performance reporting.		
2.	ATB, in collaboration with CDI and the Regional Offices, should conduct a functional review of the implementation support modalities to achieve the Economic Development Strategic Goal, assessing staffing, skillsets and workflows, and funding and resource-allocation constraints across the HQ and Regional Offices. Based on the review, ATB and CDI should design and implement a resourcing and	High	Yes	The required functional review of its implementation modalities to achieve the Economic Development Strategic Goal will be conducted as recommended.	Conduct functional review including assessing staffing, skillsets and workflows, and funding and resource-allocation constraints across the HQ and Regional Offices.	ATB/ECD (in coordination with CDI and Regional Offices)	31 December 2027

Ref	Recommendation	Priority Rating	Accepted (Y/N)	Management Comments	Agreed Actions	Office/ Section Responsible	Target Date
	delivery mechanism that clarifies implementation responsibilities and regional support arrangements and identifies feasible resourcing options to strengthen its tailored support to the Member States.						
3.	Aligned with the ICAO Strategic Plan 2026–2050, ATB, in collaboration with the Aviation Data and Analysis Panel, should develop a mechanism to strengthen ICAO aviation data as a strategic enabler for Member State decision making, by improving the timeliness, accessibility, and relevance of ICAO data products, as well as by enhancing partnerships for data sharing. This could include clear corporate commitments for regular and timely data release, equitable and predictable access to core datasets (e.g. traffic, connectivity, SDG indicators), and closer alignment of data products with differentiated regional and national policy and planning needs.	High	Yes	The Aviation Data and Analysis Panel (ADAP) is systematically kept informed of ongoing initiatives and strategic directions aimed at expanding the scope, quality, and reach of ICAO data. Given the continuous progress in this field, additional efforts and resources are required to facilitate the progressive adoption of modern data exchange platforms to enhance efficiency, accessibility, and interoperability of aviation data.	ATB, with the support of ADAP, will develop a mechanism to enhance the timeliness, accessibility and relevance of ICAO data products to ensure that they respond better to States needs, and exploit revenue-generation potential.	ATB/ECD (in coordination with ANB, CDI/RPM and Regional Offices)	31 December 2027
4.	In collaboration with Panels, ATB should assess identify and develop quasi-regulatory instruments (e.g., model regulations, voluntary codes, implementation scorecards) needed by Member States to strengthen the normative pull of ICAO's economic guidance in the absence of SARPs and	Medium	Yes	The Council agreed to pursue the development of a strategic roadmap to enhance and support the implementation of activities under the Economic Development of Air Transport work programme as reflected in the ICAO Business Plan 26-28 (C-DEC 235/8 refers).	Develop a strategic roadmap to support the implementation of activities under the Economic Development of Air Transport strategic goal.	ATB/ECD	31 December 2027

Ref	Recommendation	Priority Rating	Accepted (Y/N)	Management Comments	Agreed Actions	Office/ Section Responsible	Target Date
	introduce regular reporting or peer-review mechanisms to monitor Member State uptake, fostering transparency and peer pressure.			This strategic roadmap will highlight the need or otherwise for the development of quasi-regulatory instruments.			
5.	ATB should adopt a results-oriented liberalization package[2] that emphasizes practical, bilateral-level facilitation and links ICAO's normative instruments to hands-on delivery (e.g., modernize and embed economic data and negotiation tools into State decision cycles; update and expand TASA tools and model clauses; provide region-specific capacity-building etc.)	Medium	Yes	Liberalization of international air transport is a process not a destination and this is ongoing with the guidance of the ICAO ECD has in place a Long-Term Vision for International Air Transport Liberalization. This issue will again be addressed by the Seventh Worldwide Air Transport Conference (ATConf/7). On the issue of expanding the TASA tool, it is pertinent to inform that this is already ongoing. The review of the document is being undertaken by the Air Transport Regulation Panel (ATRP). On the part of the Secretariat, there is ongoing effort to create an interactive E-platform for TASA and WASA to make them more responsive to the needs of Member States. This will be reviewed and, as necessary, updated following the outcomes of ATConf/7, to reflect Member States' guidance and evolving priorities.	Develop the TASA/WASA interactive platform to be more responsive to the needs of Member States. ATB will pursue a more results-oriented approach to liberalization. This will include continued enhancement of available tools and guidance, increased attention to practical application at the bilateral level through facilitation and capacity-building activities, and improved understanding of how these products are used by States. The scope and sequencing of these efforts will be adjusted , in light of evolving priorities, available resources and guidance from the ATConf/7.	ATB/ECD	31 December 2028

ANNEX 2: THEORY OF CHANGE

This Annex presents the reconstructed Theory of Change for ICAO's Economic Development of Air Transport Strategic Objective, accompanied by a short validation narrative to assess the relevance of this Strategic Objective.

Results chain: The Theory of Change (ToC) proposes that ICAO's outputs (e.g., capacity-building, data tools, liberalization frameworks, technical assistance, and training) will collectively lead to outcomes such as increased air connectivity, stronger economic integration, and use of aviation as a development tool.

Primary data collected during the evaluation confirms that capacity-building, data accessibility, liberalization, and integration into national planning directly influence improvements in connectivity, economic growth, and integration of aviation into broader strategies. The survey shows that ICAN, liberalization frameworks, and passenger rights initiatives have tangible impacts in APAC, EUR/NAT, and parts of Africa. There is strong demand for data-driven decision-making; new ICAO indices and statistical tools are recognized as valuable when effectively used.
However, the outputs often lack implementation follow-through. Many states report that ICAO's toolkits and policies are "too high-level" and do not translate into local action. In several regions (e.g., WACAF, ESAF), progress is slowed by low institutional capacity, limited technical assistance, and insufficient funding, meaning the causal link from outputs to intended outcomes is weaker.

Assumption: Most core assumptions are valid, but the ToC underestimates the resource, coordination, and political constraints any state faces. Several assumptions are well-supported by evidence, while others require refinement. There is strong confirmation that aviation acts as a key enabler of economic growth, with multiple states across regions integrating aviation into their national development strategies, which has become key success factor. Similarly, evidence from APAC, SAM, and MID regions demonstrates that enhanced connectivity drives competition and consumer welfare, with liberalization leading to lower fares, greater route diversity, and stronger tourism flows. Additionally, primary data highlights that data quality and usage are critical, emphasizing the need for improved access to ICAO statistics and enhanced analytics training to support evidence-based policymaking.

However, some assumptions are overly optimistic. International cooperation cannot be taken for granted, as many regions report fragmented coordination between ICAO, regional organizations, and national authorities. Likewise, the assumption that states can implement ICAO frameworks without sustained technical assistance and financing does not hold true, particularly for developing countries and small island developing states. Finally, while regulatory efficiency is assumed to reduce costs and improve outcomes, evidence shows that outdated or overly complex ICAO frameworks can instead create significant implementation challenges for smaller and resource-constrained states.

Figure 19: Reconstructed Theory of Change for the Economic Development Strategic Objective

