

AIRPORTS COUNCIL INTERNATIONAL

Request for Proposal (RFP):

Study on Airports in Southeast Asia (ASEAN): Measuring Socio-Economic Value and Advancing Liberalization

Commissioned by Airports Council International Asia-Pacific & Middle East (ACI APAC & MID)

A strategic assessment of the role, performance, and modernization needs of ASEAN airports in supporting regional integration, sustainable development, and connectivity advancement

Airports in Southeast Asia are facing a defining moment. Amid surging demand for air travel, evolving regional integration ambitions under ASEAN, and the imperative for digital transformation, airport infrastructure is emerging as a critical lever for inclusive economic growth, social cohesion, and sustainable development across the region.

Commissioned by Airports Council International – Asia-Pacific & Middle East (ACI APAC & MID), this study seeks to provide a comprehensive, data-driven, and policy-relevant assessment of airport development in Southeast Asia. The study will cover all ten ASEAN member states and focus on two interrelated pillars:

1. **Socio-economic contributions:** Quantifying the direct, indirect, induced, and catalytic economic and social impact of airports, disaggregated by country and linked to development outcomes such as employment, access to essential services, and regional equity. These impacts will be mapped against key UN Sustainable Development Goals (SDGs).
2. **Liberalization progress and connectivity gaps:** Evaluating how far ASEAN states have implemented the ASEAN Single Aviation Market (ASAM), identifying policy and operational barriers, and quantifying connectivity gaps and lost opportunities for intra- and inter-regional integration.

The primary objectives of the study are to (1) generate actionable insights, (2) support advocacy toward national and ASEAN-level bodies, and (3) offer an empirical foundation for infrastructure investment, regulatory alignment, and capacity-building initiatives.

The outputs of this study will serve ACI APAC & MID and its members as a reference for policy engagement, technical coordination, and long-term planning to ensure ASEAN's airports remain engines of connectivity, resilience, and economic advancement.

1. Background and context

- 1.1. The airports of Southeast Asia serve as critical gateways for economic development, social inclusion, and regional connectivity. Across the ten member states of the Association of Southeast Asian Nations (ASEAN), airports are strategic enablers of trade, tourism, investment, and mobility. As the region continues to experience rapid demographic and economic transformation, the role of airports becomes even more consequential.
- 1.2. Southeast Asia is home to over 685 million people, many of whom reside in countries with geographically fragmented territories such as Indonesia and the Philippines. In such contexts, air transport remains indispensable for national cohesion and equitable access to essential services. At the same time, ASEAN has collectively pursued regional integration through frameworks such as the ASEAN Economic Community and the ASEAN Single Aviation Market (ASAM). Despite these efforts, the liberalization of air services remains uneven, with persistent policy and institutional bottlenecks hampering the full realization of intra-regional connectivity.

AIRPORTS COUNCIL INTERNATIONAL

- 1.3. Meanwhile, the airports in this region face growing expectations in terms of capacity, service quality, and technological sophistication. Passenger demand is forecast to double by 2050, yet infrastructure gaps, regulatory constraints, and fragmented innovation strategies could limit the ability of airports to meet this demand effectively and sustainably.
- 1.4. Against this backdrop, Airports Council International – Asia-Pacific & Middle East (ACI APAC & MID) seeks to commission a forward-looking study that will provide empirical insights, policy guidance, and actionable recommendations on two interrelated areas:
 - 1.4.1. The current and evolving socio-economic contribution of airports in the ten ASEAN countries.
 - 1.4.2. The status and effectiveness of air liberalization efforts and connectivity outcomes under the ASEAN Single Aviation Market.
- 1.5. This study will support ACI APAC & MID's advocacy efforts with national governments, ASEAN bodies, regulatory authorities, and airport operators. It will also serve as a technical reference to inform investment priorities, capacity-building programs, and policy dialogues on the future of airports in Southeast Asia.
- 1.6. In commissioning this study, ACI APAC & MID aims to elevate the strategic discourse around airport development—one that balances economic growth, technological progress, and regional equity, while aligning with global sustainability and development agendas, including the United Nations Sustainable Development Goals (SDGs).

2. Objectives and scope of work

- 2.1. The overarching objective of this study is to produce a strategic, evidence-based assessment of the evolving role of airports in Southeast Asia, structured around two thematic pillars: socio-economic impact and air transport liberalization and connectivity. The study shall generate fresh insights, support advocacy efforts, and inform regulatory, operational, and investment decisions in the ASEAN region.
- 2.2. The work must be rooted in sound methodology, balance quantitative rigor with policy relevance, and produce outputs accessible to a range of stakeholders—including policymakers, airport operators, regulators, development institutions, and regional ASEAN bodies.
- 2.3. The consultant shall deliver the following two interrelated components:

2.3.1. Pillar 1: Updated Socio-Economic Impact of Airports in the 10 ASEAN Member States

- 2.3.1.1. The consultant shall undertake a comprehensive analysis of the economic and social contribution of airports across ASEAN, drawing on the most recent data (preferably 2024) and disaggregating the impact across multiple dimensions:
 - 2.3.1.1.1. Direct, indirect, induced, and catalytic impacts of airport activity, including employment, GDP contribution, and multiplier effects through aviation-enabled sectors (e.g., tourism, logistics, trade facilitation).

AIRPORTS COUNCIL INTERNATIONAL

- 2.3.1.1.2. National-level quantification for all ten ASEAN member states, with select sub-national or case study illustrations (e.g., airports in archipelagic areas or regions with limited ground transport infrastructure). The study shall analyse the spillover contributions of major regional hub airports to surrounding economies, including their role in facilitating trade corridors, tourism distribution, and secondary airport growth.
- 2.3.1.1.3. Analysis of the enabling role of airports in delivering broader development objectives, such as access to health services, disaster response logistics, business development, and regional equity.
- 2.3.1.1.4. Mapping the relevance of airport development to national planning documents or ASEAN integration goals, where applicable.
- 2.3.1.1.5. Alignment of socio-economic contributions with relevant UN Sustainable Development Goals (SDGs), particularly SDG 8 (Decent Work and Economic Growth), SDG 9 (Industry, Innovation and Infrastructure), and SDG 10 (Reduced Inequalities).
- 2.3.1.2. The consultant shall propose a transparent and replicable methodology for impact estimation, drawing where appropriate on global ACI frameworks and adjusting for data availability across the ten countries.
- 2.3.1.3. The analysis shall apply input–output (I-O) modelling or Social Accounting Matrix (SAM) techniques where data allow, in order to quantify multipliers robustly. Tourism Satellite Accounts (TSAs) shall be used to assess catalytic tourism impacts. The consultant shall provide country-level elasticities (e.g., jobs per additional million passengers, GDP per additional billion USD in airport revenues) and, where possible, distinguish between skilled/unskilled employment and aviation-dependent/non-aviation dependent sectors.

2.3.2. Pillar 2: Assessment of ASEAN Liberalization Progress and Connectivity Gaps

- 2.3.2.1. This component shall examine how far ASEAN member states have progressed in implementing the ASEAN Single Aviation Market (ASAM) and the associated impacts on intra- and extra-ASEAN air connectivity. Specific areas of analysis include:
 - 2.3.2.1.1. Mapping the legal, regulatory, and institutional status of liberalization efforts in each of the ten ASEAN countries, identifying full, partial, or non-implementation of ASAM provisions.
 - 2.3.2.1.2. Analysis of connectivity outcomes, including direct and indirect route networks, frequency of service, underserved routes, and the role of secondary cities.
 - 2.3.2.1.3. The connectivity analysis shall differentiate between hub-driven network connectivity, where liberalization enhances transfer flows through regional

AIRPORTS COUNCIL INTERNATIONAL

hubs, and point-to-point connectivity, which reflects direct bilateral markets. This distinction is essential to capture the catalytic role of hub airports in fostering broader regional integration.

2.3.2.1.4. The study shall identify policy and operational barriers that hinder the full realisation of ASAM—such as bilateral restrictions, ownership and control rules, visa and facilitation policies, and slot access limitations—and rank them by their relative economic and connectivity impact, thereby enabling policymakers to prioritise reforms with the highest potential gains.

2.3.2.1.5. The study shall evaluate the connectivity and economic gains foregone as a result of delayed or partial liberalisation, using illustrative quantitative modelling or scenario analysis where feasible to compare full ASAM implementation with the current status quo.

2.3.2.1.6. The study shall map key inter-regional connectivity corridors (e.g., ASEAN–Middle East, ASEAN–South Asia, ASEAN–Europe) and assess how liberalisation could strengthen ASEAN’s integration into these wider markets, thereby enhancing its competitiveness as a connected region.

2.3.2.2. This pillar shall underpin policy-level advocacy by highlighting both the current state of implementation and the strategic costs of inaction, as well as the potential benefits of reform. The consultant shall translate these findings into actionable insights and recommendations for policymakers and airport stakeholders, with the aim of advancing the competitiveness of ASEAN airports.

2.3.2.3. Connectivity analysis shall employ seat-capacity and frequency-weighted connectivity indices, drawing on OAG schedules and other industry databases. Scenario modelling shall be undertaken to estimate connectivity and economic gains under “full ASAM implementation” versus the “status quo”. These scenarios shall quantify foregone gains in terms of GDP contribution, passenger volumes, and tourism arrivals. Identified barriers shall be scored and ranked on a 0–5 scale, weighted by their relative economic and connectivity impact, to prioritise reforms with the highest potential returns.

2.4. Each of the two pillars shall culminate in:

2.4.1. Key findings and implications for ASEAN policymakers and airport stakeholders;

2.4.2. Policy and investment recommendations, encompassing practical levers such as infrastructure capacity and facilitation measures, and aligned with both national development priorities and regional integration objectives.

2.4.3. Where relevant, alignment with SDG targets, to contextualize the broader development contribution of airport advancement in ASEAN.

3. Deliverables and workplan

AIRPORTS COUNCIL INTERNATIONAL

- 3.1. The consultant shall be responsible for delivering a complete suite of analytical outputs, narrative materials, and visual presentations that serve the dual purpose of internal policy guidance and external stakeholder engagement. The deliverables must be of high professional quality, adhere to the agreed timelines, and be designed to facilitate both technical depth and accessibility for a broader audience.

3.1.1. Core deliverables

- 3.1.1.1. The consultant is expected to produce the following outputs:

3.1.1.1.1. Inception report

- 3.1.1.1.1.1. Due: Two weeks after contract signature

3.1.1.1.1.1.1. Overview of the refined methodology for each of the two pillars

3.1.1.1.1.1.2. Detailed workplan and timeline with proposed milestones

3.1.1.1.1.1.3. Data collection strategy, including proposed stakeholder engagements and data sources per country

3.1.1.1.1.1.4. Risk mitigation plan for data gaps, access limitations, or political sensitivities

3.1.1.1.2. Interim progress report

- 3.1.1.1.2.1. Due: Midpoint of project timeline

3.1.1.1.2.1.1. Preliminary findings from Pillar 1 (socio-economic impact) and Pillar 2 (liberalization analysis)

3.1.1.1.2.1.2. Summary of data availability and adjustments made to methodologies

3.1.1.1.2.1.3. Flagged areas requiring clarification or stakeholder input

3.1.1.1.3. Final report

- 3.1.1.1.3.1. Due: End of project

3.1.1.1.3.1.1. A professionally formatted document (~100 pages excluding annexes), comprising:

3.1.1.1.3.1.1.1. Executive summary (3–4 pages)

3.1.1.1.3.1.1.2. Full narrative chapters for each of the two thematic pillars

3.1.1.1.3.1.1.3. Country-specific snapshots (2–3 pages per country), with headline data, charts, and key messages

3.1.1.1.3.1.1.4. Regional synthesis of trends, gaps, and opportunities

3.1.1.1.3.1.1.5. Action-oriented recommendations targeting governments, regulators, and airport operators

AIRPORTS COUNCIL INTERNATIONAL

3.1.1.1.3.1.2. The report must be delivered in both editable (Word/PowerPoint) and print-ready (PDF) formats

3.1.1.1.3.1.3. Annexes to include data tables, scoring models, methodological notes, references, and stakeholder consultation summary (if applicable)

3.1.1.1.4. Data workbook and technical annex

3.1.1.1.4.1. An Excel file containing all raw and processed data, indicators, scoring values, and sources

3.1.1.1.4.2. The workbook shall include country-level datasets disaggregating employment, GDP, passenger traffic, and connectivity indices. A reform-prioritisation matrix ranking identified barriers by potential GDP and traffic impact shall also be included.

3.1.1.1.4.3. Any geospatial or visual mapping components shall also be shared in open or reproducible formats

3.1.1.1.4.4. Detailed notes on assumptions, proxies, and confidence levels for transparency and replicability

3.1.1.1.5. Summary presentation deck

3.1.1.1.5.1. A visually polished PowerPoint deck summarizing the key findings, figures, and messages

3.1.1.1.5.2. Designed for policy dialogues, Board-level briefings, and potential public release

3.1.1.1.5.3. To be delivered in editable format with visual templates and speaking notes

3.1.1.1.6. Stakeholder briefing

3.1.1.1.6.1. A virtual presentation session to ACI Asia-Pacific & Middle East leadership and relevant internal teams

3.1.1.1.6.2. The consultant shall prepare and deliver two formal presentations of the study's findings: (i) to the Board of ACI Asia-Pacific & Middle East, and (ii) at the Annual Conference of ACI Asia-Pacific & Middle East in Bangkok, Thailand in 2026. Both presentations are mandatory deliverables. The consultant shall internalize the costs of preparing and delivering these engagements (including any travel or virtual delivery arrangements) within the overall financial proposal, and no separate reimbursement will be provided. The Board presentation shall be concise (10–20 minutes) and tailored for senior decision-makers, while the Conference presentation shall be adapted for a broader industry audience, with accompanying materials.

AIRPORTS COUNCIL INTERNATIONAL

3.1.1.1.6.3. Optional: preparation of a short video summary or infographics (to be negotiated separately)

3.1.2. Workplan and timeline

3.1.2.1. The indicative timeline for the study is 24 weeks from the date of contract signing. The consultant shall propose a detailed timeline including dependencies, internal review rounds, and final submission dates. ACI Asia-Pacific & Middle East reserves the right to adjust deliverable deadlines based on internal coordination or external events.

3.1.2.2. The consultant must ensure availability for feedback sessions and revision windows. All deliverables shall be reviewed and approved by ACI APAC & MID before being deemed final.

Phase	Deliverable	Timeframe
Project kick-off	Inception report	Week 2
Data collection and analysis	Interim progress report	Week 8
Draft report submission	Draft final report, summary deck	Week 16
Final submission	Final report, data workbook, presentation	Week 20
Presentation & debrief	Stakeholder briefing	Week 24

4. Methodology and data requirements

4.1. The credibility and policy utility of this study rest on the strength of its methodology, the clarity of its analytical framework, and the quality of the underlying data. While ACI Asia-Pacific & Middle East will provide strategic oversight and support on stakeholder engagement, the responsibility for designing and implementing the methodology lies with the selected consultant.

4.2. The methodology must balance analytical rigor with practical feasibility across a region characterized by varying data quality, transparency, and institutional maturity. Proposals that demonstrate methodological clarity, regional nuance, and innovation in addressing data gaps will be evaluated favorably.

4.3. Methodological expectations by pillar

4.3.1. Pillar 1: Socio-economic impact analysis

4.3.1.1. The consultant shall propose a framework to estimate the direct, indirect, induced, and catalytic economic impacts of airport activity in each ASEAN country.

4.3.1.2. The analysis may draw on established ACI economic impact models or comparable frameworks adapted to local contexts.

AIRPORTS COUNCIL INTERNATIONAL

- 4.3.1.3. Estimates must be anchored in recent data (2023 or 2024 where available) and adjusted for country-specific factors such as airport traffic volume, tourism reliance, and employment structures.
- 4.3.1.4. Proxy indicators or national multipliers should be transparently disclosed and justified where direct data is unavailable.
- 4.3.1.5. Qualitative case studies should be supported by structured interviews or desk research where feasible.
- 4.3.1.6. The analysis should contextualize results within the SDG framework, particularly relating to economic growth, inequality reduction, and infrastructure development.

4.3.2. Pillar 2: Connectivity and liberalization assessment

- 4.3.2.1. The consultant shall undertake a policy and connectivity mapping exercise to assess each country's implementation of the ASEAN Single Aviation Market (ASAM).
- 4.3.2.2. This includes: bilateral/multilateral air service agreements, ownership and control regulations, market access for carriers, and barriers to fifth and sixth freedom operations.
- 4.3.2.3. Connectivity analysis should combine policy review with empirical data on air service patterns, drawing on OAG schedules, government sources, or aviation databases.
- 4.3.2.4. Where relevant, inter-regional corridors (e.g., ASEAN–Middle East, ASEAN–South Asia, ASEAN–Europe) should be examined for liberalization opportunities and connectivity shortfalls.
- 4.3.2.5. A traffic rights index, route development matrix, or policy liberalization scoring framework is encouraged to allow comparative insight.
- 4.3.2.6. Analytical outputs must be actionable, identifying high-potential reforms and their anticipated benefits.

4.4. Cross-cutting data considerations

- 4.4.1. All data sources, assumptions, and calculations must be transparently documented.
- 4.4.2. The consultant shall provide a consolidated country-by-country data inventory covering traffic statistics, bilateral agreements, visa regimes, slot allocation policies, and other relevant regulatory documentation. Where proxy indicators are employed, confidence intervals or sensitivity tests must be reported.
- 4.4.3. Where national-level data is unavailable or outdated, the consultant shall indicate alternative proxy indicators or triangulated sources.

AIRPORTS COUNCIL INTERNATIONAL

4.4.4. Priority should be given to data from reputable institutions such as ACI, ICAO, IATA, World Bank, UNWTO, national statistical offices, airport authorities, and published industry reports.

4.4.5. Stakeholder insights from regulators, airport operators, and policy actors may be included via structured interviews, subject to availability and coordination.

4.5. Ethical and political considerations

4.5.1. The consultant is expected to be sensitive to political and institutional variation across ASEAN countries.

4.5.2. All research must be conducted in a manner that respects national sovereignty, data confidentiality, and the institutional independence of regulatory agencies and airport operators.

4.5.3. Findings should be framed constructively, identifying opportunities and pathways for reform without direct attribution of underperformance.

5. Consultant qualifications

5.1. The successful consultant will possess a demonstrated track record of delivering rigorous, policy-relevant research in the field of aviation, transport infrastructure, or regional economic development, ideally within the ASEAN context or comparable emerging markets. Proposals will be assessed not only on methodological soundness but also on the team's ability to deliver actionable insights that reflect both technical accuracy and the policy nuances of the region.

5.2. Minimum eligibility requirements:

5.2.1. Proven experience conducting multi-country economic or policy studies in the aviation, airport, or transport infrastructure sectors.

5.2.2. Demonstrable capability to deliver socio-economic impact assessments and connectivity analysis.

5.2.3. Familiarity with ACI frameworks, air service agreement structures, and ASEAN institutional arrangements is strongly preferred.

5.2.4. Demonstrated ability to work with both quantitative data and qualitative policy environments, particularly in data-constrained jurisdictions.

5.2.5. A multidisciplinary team comprising experts in at least the following areas:

5.2.5.1. Airport economics and infrastructure policy.

5.2.5.2. Aviation regulation and connectivity.

5.2.5.3. Regional development or public policy.

5.2.6. Fluency in English, with excellent writing, presentation, and stakeholder engagement skills.

AIRPORTS COUNCIL INTERNATIONAL

5.3. Desirable attributes

5.3.1. In addition to meeting the eligibility requirements, proposals will be viewed favourably if they demonstrate:

- 5.3.1.1. Prior engagement with ACI (World or regional offices), ICAO, ASEAN Secretariat, or comparable institutions.
- 5.3.1.2. Experience in conducting work involving stakeholder consultations with government authorities, airport operators, or multilateral institutions.
- 5.3.1.3. Capacity to deliver under compressed timelines with clear internal project management structures.
- 5.3.1.4. An understanding of political economy considerations surrounding liberalization, regulatory reform, or infrastructure investment in Southeast Asia.
- 5.3.1.5. Proposed approaches to visualizing findings (e.g., infographics, dashboards, interactive maps).

6. Submission guidelines and contact information

6.1. Proposal submission requirements

6.1.1. Interested consultants or firms are invited to submit a comprehensive proposal that addresses the full scope of this RFP. The proposal must be written in English and submitted in PDF format. Proposals must include the following components:

6.1.1.1. **A. Technical proposal (maximum 15 pages, excluding annexes):**

- 6.1.1.1.1. Executive summary
- 6.1.1.1.2. Detailed methodology for each of the two pillars
- 6.1.1.1.3. Proposed data sources and approach to addressing data limitations
- 6.1.1.1.4. Organizational structure and responsibilities of key team members
- 6.1.1.1.5. Project management approach and quality assurance mechanisms
- 6.1.1.1.6. Any potential risks or sensitivities foreseen and mitigation strategies

6.1.1.2. **B. Workplan and timeline:**

- 6.1.1.2.1. Gantt chart or equivalent timeline outlining all major activities, milestones, and deliverables over the project duration
- 6.1.1.2.2. Expected inputs from ACI Asia-Pacific & Middle East and coordination needs

6.1.1.3. **C. Financial proposal:**

- 6.1.1.3.1. Total cost in USD, inclusive of all taxes, professional fees, and other expenses

AIRPORTS COUNCIL INTERNATIONAL

6.1.1.3.2. Detailed budget breakdown by workstream, deliverable, or activity

6.1.1.3.3. Costing must cover preparation and delivery of Board and ACI Annual Conference presentations

6.1.1.3.4. Clear payment schedule tied to deliverables and/or milestones

6.1.1.4. D. Annexes:

6.1.1.4.1. CVs of key personnel, clearly indicating relevant experience

6.1.1.4.2. Sample(s) of previous work relevant to this project (reports, dashboards, etc.)

6.1.1.4.3. List of clients or references (may include ACI, ICAO, governments, or regional institutions)

6.1.2. Submission deadline and instructions

6.1.2.1. All proposals must be submitted electronically by **Friday, 3rd October 2025** to the following contacts:

6.1.2.1.1. Mr. Ilia Lioutov

Head, Economics and Middle East Office
Airports Council International – Asia-Pacific & Middle East
Email: ilioutov@aci-asiapac.aero

6.1.2.1.2. Mr. Philip Kwok

Senior Manager, Economics
Airports Council International – Asia-Pacific & Middle East
Email: philip@aci-asiapac.aero

6.1.2.2. Late submissions will not be considered unless pre-approved under exceptional circumstances.

6.1.3. Administrative timeline of the RFP process:

Date/Period	Stage	Description
Mon, 15 Sep 2025	RFP Launch	RFP issued and circulated to potential bidders; posted on relevant channels
Mon, 29 Sep 2025 (17:00 HKT)	Clarification deadline	Deadline for submission of questions/requests for clarification
Fri, 3 Oct 2025 (23:59 HKT)	Proposal submission deadline	Proposals must be submitted electronically in PDF format. Late submissions will not be accepted unless pre-approved under exceptional circumstances

AIRPORTS COUNCIL INTERNATIONAL

6–10 Oct 2025	Administrative screening	Secretariat checks compliance of proposals (submission requirements, completeness of technical/financial documentation)
13–20 Oct 2025	Technical & financial evaluation	Eligible proposals evaluated against criteria in Section 5 (methodology, team qualifications, prior work, workplan, value for money)
21–24 Oct 2025	Internal review & Recommendation	Draft evaluation summary prepared by ACI APAC & MID Economics team and circulated internally
Week of 27 Oct 2025	Decision & approval	Final decision and approval by Director General and senior management
By Fri, 31 Oct 2025	Notification of results	All bidders informed of outcome; unsuccessful bidders may request short debrief
Week of 3 Nov 2025	Contract negotiation & signature	Agreement finalized and signed with selected consultant
Mon, 10 Nov 2025	Project kick-off (indicative)	Formal start of the project, subject to contract signature and mobilization

6.1.4. Clarifications and questions

6.1.4.1. Any questions or requests for clarification should be submitted in writing to the above contacts. Responses to all queries may be shared with other bidders in anonymized form to ensure equal transparency.

6.1.5. Terms and conditions

6.1.5.1. All proposal costs shall be borne by the bidder and will not be reimbursed by ACI APAC & MID.

6.1.5.2. ACI APAC & MID reserves the right not to select any proposal submitted, to cancel or modify this RFP process at any time, and to award partial contracts.

6.1.5.3. Intellectual property for all final deliverables shall rest with ACI APAC & MID, unless otherwise agreed in writing.

—END OF DOCUMENT—