

ECONOMIC SECURITY THROUGH COMMERCIAL AVIATION: BANGLADESH PERSPECTIVE

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INTRODUCTION

Bangladesh is a promising developing country in South East Asia with \$772 per capita income in 2012¹. The economy has grown 5-6% per year despite political instability, poor infrastructure, corruption, insufficient power supply and slow implementation of economic reforms. Though agriculture, garment sector remain as major contributor to national economy, aviation sector is also an emerging sector from where every year significant amount of revenue goes to the national treasury. But compare to the other Southeast Asian countries in the region the growth of commercial aviation is relatively less in Bangladesh. The conservative approach in the aviation policy, lack of level playing field for the private entrepreneurs, absence of government patronization for the private airlines, etc are the notable major barriers for growing of the aviation sector.

The commercial aviation, that is to say the Air Transportation of Bangladesh has a major role to play in the national life. Over the years, it is found to be the most important infrastructure facility for the development of the country as people have been exploiting this third dimension of air transportation for the carriage of men and material. It has been creating a profound impact in perpetuating economic growth. The commercial aviation or the air transportation is a broad category that encompasses any type of flight performed for profit. The air transport industry includes those activities that are directly dependent on transporting people and cargoes by air.

Bangladesh has huge prospect in terms of both domestic, international passenger and cargo carrying aspects. Despite limited geographical depth and improved road and railway network still passenger and cargo carrying by air has increased in a high rate. On the other hand in terms of international passengers it is found that foreign airlines are operating to and from Bangladesh more, in comparison to national carriers. The main reason behind is there are huge passenger to be flown from Bangladesh and there are not enough national airlines to take the load. In the present competitive day it is more important to attract passengers by service and schedule, which is seriously lacked by Biman Bangladesh Airlines, which is our prime national airline.² Thus if we really want to mean business we will have to improve the service, schedule and capacity of our national carrier, Biman and other private airlines.

1. Bangladesh Economic Review 2012.

2. Hasan, Air Cdre M Naim, loc.cit.

Government's Role

Air Service Agreement. Bangladesh has the bilateral “Air Service Agreement” (ASA) with 45 countries. ASA allows the frequency of flight that can be operated from that country. Bangladeshi airlines are operating in 17 countries out of those 45 countries.³ Of late, the government, in addition to Biman, Bangladesh Airlines Ltd, has nominated Best Aviation Ltd; Regent Airways Ltd and United Airways Bangladesh Ltd as the designated airlines. The government also, remaining within the limit of the Air Service Agreement, has approved the operations of these newly designated private airlines in different international destinations and accordingly asked the CAAB to take action.⁴ This approval reflects the positive attitude and sincerity of the government in order to promote commercial aviation in the country.

But it is important to make the balance between national airlines operation, which is less and frequency of foreign airlines, which is more. Though foreign airlines are more but these are ultimately draining our valuable foreign currency. At the same time the more foreign airlines come to Bangladesh the more taxes and revenue will be earned by government.⁵ So if we look for revenue only we should encourage more foreign airlines to operate from Bangladesh. Whereas if we want to encourage national airlines then we need to restrict little bit the operation of foreign airlines.⁶ This difficult balance of decision we will have to make.

Investment Opportunities. Bangladesh is a developing country who has many important sectors like, education, health, infrastructure, rural development etc to give emphasis for development. Thus it is not easy for the government to allocate huge fund for the development of aviation sector. At the same time we need to grab the future opportunities and challenges coming in front of us in near future. Thus it is very important for the government to encourage local or foreign investors to invest more in this sector. We must create a level playing ground for the investors and at the same time ensure business security through political assurance.⁷ If we can do it successfully, skill personnel will also increase who in turn will contribute in capacity building of Bangladesh as a whole.

Future Plan. Bangladesh government has future plan to develop the commercial aviation sector and the overall infrastructure of airport, terminal facility, runways etc. In the 6th Five Year Plan which is planned and published by the Planning Commission under Planning Ministry of Bangladesh has clearly identifies the limitation of the sector and plans for future development.⁸

3. Stated by Mr Azad Zahirul Islam Dte ATS, CAAB. On an interview by the researcher on 06 May 2013.

4. Ibid.

5. Hasan, Air Cdre M Naim, loc.cit.

6. Ibid.

7. Hasan, Air Cdre M Naim, loc.cit.

8. 6th Five Year Plan, Part-2, page-204, Published by General Economic Division, Planning Commission, Ministry of Planning, Government of Peoples republic of Bangladesh (2011).

A Strategy for Bangladesh

Bangladesh has a large growing air transportation market which is becoming increasingly attractive as new gateway points are opening up to Pacific and North American region for international operations. The international traffic in Bangladesh is growing at a high rate. This growing market must be viewed in the context of a national carrier which does not have the size or resources to take on mega carriers. Even today, despite the protection of the bilateral regime, the share of the Bangladeshi carriers in international traffic to/from Bangladesh is only 29%.⁹ If the protection of bilateral is withdrawn, the fleet superiority of the mega carriers will lead to an erosion in the market share. The structure of the airline industry in Asia Pacific is changing as regulations are liberalized and carriers find innovative ways to expand beyond national boundaries to serve burgeoning demand.

The impact of liberalization is particularly dramatic in the case of low-cost airlines, which are stimulating air travel by lowering fares and opening new markets. In order to compete, established airlines are forming low-cost units, further expanding the affordability and availability of air travel.¹⁰ Where market development has outpaced official liberalization of markets, new airlines have been launched as international joint ventures, carrying established travel brands into new markets. Bangladesh should also encourage private airlines, this will increase the competition which will in turn increase the passenger service and reduce the travel cost. Thus liberalization of aviation sector is the best strategy for Bangladesh.¹¹ At the same time capacity building in terms of service, flight schedule and smooth maintenance of aircraft of Biman Bangladesh Airlines is essentially required. In terms of Biman, new and modern aircrafts must be procured to reduce the huge maintenance cost and regain the trust in maintaining schedule. Also Board of Directors must be selected in such a way so that they are the investors and also have adequate knowledge on aviation.

Bangladesh Air Force (BAF) expertise in terms of maintenance support to private airlines may be offered for the overall development of the country. In this regard BAF Aeronautical Centre would be able to play a significant role, which will enhance the overall maintenance capacity of BAF and ensure the optimum utilization of this valuable national asset for the national development of the country. At the same time it will act as war reserve for the country.

9. Rahman, Mizanur, Ahmed, Gp Capt Mushtaq and Islam, Azad Zahirul. loc.cit.

10. Hasan, Air Cdre M Naim loc.cit.

11. Ibid.

THE ECONOMICAL IMPORTANCE OF COMMERCIAL AVIATION

Air Transport Industry

Air Transport can play a key role in economic development and in supporting long-term economic growth. It facilitates a country's integration into the global economy, providing direct benefits for users and wider economic benefits through its positive impact on productivity and economic performance. Global economic growth is a key driver of growth in air traffic demand. However, while air traffic demand has increased as economies have grown, air transportation itself can be a key cause and facilitator of economic growth. Not only is the aviation industry a major industry in its own right, employing large numbers of highly skilled workers, but more importantly it is an essential input into the rapidly growing global economy.¹² Greater connections to the global air transport network can boost the productivity and growth of economies by providing better access to markets, enhancing links within and between businesses and providing greater access to resources and to international capital markets.

Option for Bangladesh. Thus in Bangladesh if we can create a congenial atmosphere, provide business security and give opportunity for investment both by foreign or local investors then obviously as a developing country we are also likely to enjoy higher rate of GDP growth by increasing connectivity. When there will be higher rate of GDP growth then the national economy will definitely enhance. At the same time this is an assurance for the investors that the rate of return of investment in aviation sector will be relatively quicker.

Economic Impact: Bangladesh Perspective

Aviation provides the only worldwide transportation network, which makes it essential for global business and tourism. It plays a vital role in facilitating economic growth, particularly in developing countries. The air transport industry has a substantial economic impact, both through its own activities and as an enabler of other industries. Its contribution includes direct, indirect and induced impacts, which are related to the total revenues of the air transport industry. The catalytic impacts of the industry are "spin-off" effects on other industries. However the main earning of any Government is taxes and tariffs from her airports. In Bangladesh the major earning comes from two ways, they are Aeronautical Charges and Non-Aeronautical Charges. The total income by CAAB from FY2000-01 to 2011-12 in terms of both aeronautical and non aeronautical field is given in the Table-1.

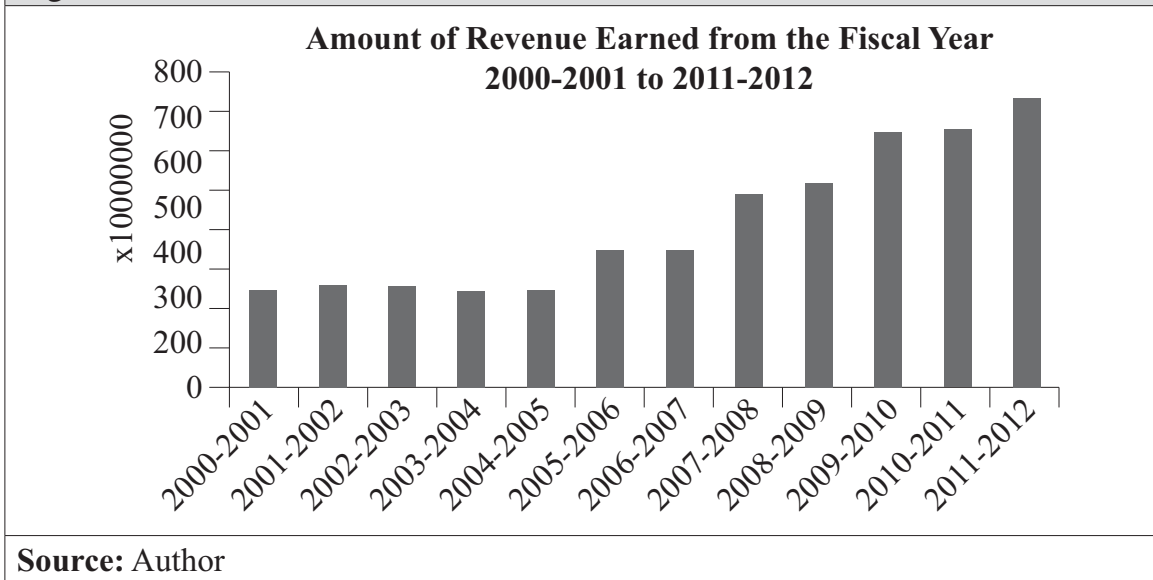
12. Ali, Sayed Hossain loc.cit.

Table-1. Collection of Revenue¹³

YEAR	Total Amount of Revenue (in Taka)	Growth Rate	Average Growth Rate	Remark
2000-2001	249,32,47,629.00			
2001-2002	259,12,28,185.00	3.93%		
2002-2003	257,84,08,320.00	-0.49%		
2003-2004	243,24,95,026.00	-5.66%		Compound Growth = 9.38%
2004-2005	246,86,10,053.00	1.48%		
2005-2006	348,43,50,956.00	41.15%		
2006-2007	348,10,58,890.00	-0.1%	11.30%	In 2011-12FY aviation sector(CAAB) contributed .08% of total GDP(\$112billion)
2007-2008	489,73,79,504.00	40.69%		
2008-2009	517,78,22,676.00	5.73%		
2009-2010	642,01,85,632.00	23.99%		
2010-2011	653,88,89,226.00	1.85%		
2011-2012	731,05,06,545.00	11.80%		
Total Revenue	4987,41,82,642.00			

Source: Author

Figure-1: Amount of Revenue Earned



13. Collected by researcher himself from Finance Section of CAAB HQ on 22 Jun 2013.

Table-10 clearly shows that in last 5 years the revenue earning of Bangladesh Government has increased significantly. In FY 2011-12, CAAB contributed .08% of total GDP. It is due to the overall global market expansion as forecasted by different agencies. Thus if this trend continues in future also we will be able to earn a good amount of foreign currency from this sector. But question is that, are we ready to accept the huge market opening ahead of us? If we are not ready to accept it, the share will be diverted to other nations in this region.

Regional Aspects. In this region Bangladesh holds a good name as liberal Muslim democratic country, which we need to capitalize. India being a big country has many security issues with all of her neighbors thus will not be able to liberalize her government policy for aviation sector easily. This will remain a great drawback for India. Pakistan on the other hand has already earned a name of “risky country”, who is busy with handling and minimizing the extremists created by herself. Myanmar with the recent democratization opening her gates to the whole world for the trade and commerce. Thus in near future Myanmar is going to be the hub of major investment which in turn will expand her aviation sector. In this context our main challenge will be to grab the future opportunities and meanwhile create the suitable field for investment. Moreover Bangladesh has all the opportunity to grab the market of Bhutan and Nepal. We know these two land lock country do not have any sea port. Their most of the cargo transportation takes place through air, or by road through India. If we can utilize our business diplomacy effectively, we can create a favorable political and economical situation for these two countries and become a regional business hub like Dubai in this region.¹⁴ If we can do it effectively air transportation market specially for cargo will expand in many fold, this in turn will enhance our national economy. Thus this is a challenge that Bangladesh has to take on the responsibility of making aviation a front-runner in the growth of national economy. Both in terms of service provider to trade expansion at home and abroad as well as help build skill and competence aviation professionals.

Probable Impact of Commercial Aviation on National Economy of Bangladesh

The amount of different taxes and tariffs of Bangladesh vis-a-vis taxes and tariffs of few developed, developing countries of the world and few of our neighbors has also been analyzed, the comparison is shown in Table-2 and Table-3. Analyzing Table 11 and Table-12 it is clearly found that in the region Bangladesh has lowest taxes and tariffs for international flights. It is really undesirable for a developing country like Bangladesh to have such low category of taxes. Where as we know that due to many factors the frequency of operation of foreign airlines will not be hampered. In order to match with other countries if Bangladesh increases her taxes and tariffs by even 5 times still we will be one of the minimum tax and tariffs charging country. But at the same time it will contribute around

14. Hasan, Air Cdre M Naim, loc.cit.

.4% of total national GDP (considering GDP of FY 2011-12). Thus without doing any real development work still we can enhance our economy. At the same time it may be kept in mind that this additional tax/revenue will be paid by the airlines or respective countries not only by the passengers. Point to be noted that with much more additional taxes all the airlines are operating in different airports. Thus airlines operation will never be reduced in Bangladesh.¹⁵ However, CAAB has also identified the low tax issue of Bangladesh and has reviewed the existing charges/taxes and send it to the government for approval. The thing we must do is to improve the quality of services and ensure implementation of prescribed safety procedures as laid down in different ICAO manuals. Moreover Bangladesh may explore few other fields from where additional taxes can be charge. It has been found that India and Pakistan are already charging from few additional fields. These additional fields of taxes will further enhance our national economy.

Table-2. Comparison of Different Charges/Tariffs¹⁶			
Country	Landing Charge (In \$)	Parking Charge (In \$)	Boarding Bridge Charge (In \$)
India	1264	20.46	200
Myanmar	1518	243	228
Pakistan	93	2.46	188
Singapore	976	79	406
Thailand	1,258	61.12	135.00
Bangladesh	8.5	2.2	165

Source: ICAO Document 7100 (2012 Edition)

15. Islam, Azad Zahirul loc.cit.

16. ICAO Document 7100 (2012 Edition) published by ICAO on 2013.

Table-3. Airport Charges & Taxes Imposed on International Passengers¹⁷	
Country	Charges (In \$)
United Kingdom	190.42
Germany	111.48
USA	65.40
Pakistan	67.21
India	49.05
Thailand	22.20
Singapore	22.02
UAE	21.78
Malyasia	20.96
Bangladesh	4.60
Source: IATA/SITA Passenger Air Tariff System date July 2012	

However as it was discussed before that, there are three types of economic impact of air transportation in the national economy, and they are discussed below:

Direct Impacts. Direct impact of civil aviation is created through manufacturing and air transportation activities as measured by the employment, payroll and sells/output associated with the following industries/entities:¹⁸

1. Schedule and non-scheduled airlines and air carriers.
2. Airport and aircraft service providers
3. Air cargo providers
4. Civil aircraft operation
5. Aircraft and components manufacturing

Direct impacts also include the activities of the aerospace manufacturers selling aircraft and components to airlines and related businesses.¹⁹ In Bangladesh huge job opportunity and business activity has opened a new gate way for national economy. With the introduction of several airlines a group of trained and experienced manpower has been created in Bangladesh. This trained manpower is a great asset for the country and who all are contributing in terms of capacity building of Bangladesh as a whole.

17. Ibid.

18 *The Economic Impact of Commercial Aviation on the US Economy*, page-19, by US Department of Transportation. (August 2011). op, cit.

19. Ali, Sayed Hossain, loc.cit

Indirect Impacts.²⁰ Indirect impacts result from expenditures of air passengers, other than air fares and associated charges paid directly to airlines or travel arrangers. Visitor expenditures translate into sales, payroll and employment of following industries/entities:

1. Traveler accommodation.
2. Food and beverage providers.
3. Arts entertainment and recreation.
4. Visitor travel services.
5. Ground Transportation.
6. Other on-and-off airport purchases of goods and services.

All these sectors indirectly related to aviation sector are growing high as aviation sector is also growing high in Bangladesh.

Induced Impacts.²¹ Induced Impacts result from expenditures made by industries identified in the measurement of primary impacts to supporting businesses and entities, as well as the spending of direct or indirect employees. Induced impacts capture the secondary impacts to the economy as direct/indirect sales, and payroll impacts are circulated to supporting industries through multiplier effects.

Enabling Impacts

Throughout the history of the aviation technological improvements have lowered the cost and increased the availability of air transportation to an ever wider market. These improvements include more efficient, safer and environment friendly aircraft, constructed with lighter and stronger materials. Modern engine and aircraft designs mean more efficient travel over longer distances.²² Improvements in IT led to enhancements in the cockpit, on the ground and throughout the air traffic system. Passenger reservation, ticketing and freight delivery system has seen a revolution in last few years. All these technological changes have reduced capital input cost. In turn these cost reduction led to expanded flight availability, increasing business and enabling other industries to transport goods less expensively by air.²³

20. *The Economic Impact of Commercial Aviation on the US Economy*, page-19. op cit.

21. Ibid, page-19.

22. Ibid, page-36.

23. Ibid, page-36.

Difficulties and Limitations

The Price of Fuel. The price of fuel is too high presently it is US \$ 1.14/litre and it is increasing day by day. Again, the price of fuel in Bangladesh is more than that of any other country in the world.²⁴ The operational cost is directly related with the fuel price. Out of the total operating cost, 50% is spent behind the fuel price by all the airlines in our country.²⁵ Whereas, airlines like Singapore Airlines, the fuel cost only 35% - 40% of the total operating cost. Because of the age-old aircraft of all the airlines of Bangladesh, both the fuel consumption and the maintenance cost are too high. This increased operational costs due to the escalation of fuel of price resulting in the increase of air fare, which, ultimately, puts an additional financial burden on the passengers.²⁶

Investment/Financial Limitation. The commercial aviation is an expensive or capital intensive business. Very few airlines in the world are making profit out of this business.²⁷ The business depends on many factors. Of them, the capital is the most important one. But the investment in the aviation sector in Bangladesh is inadequate. There is no budget allocation from the government for the improvement of this sector.²⁸ Unless adequate fund as back up is available, it will be very difficult for the private airlines to sustain. As such, entrepreneurs should be encouraged to invest in the aviation sector for its further growth.

Lack of Infrastructural Facilities and Training. The initial investment of the private airlines is too high as they have to, apart from procuring aircraft; make 1 year's advance payment of the rent of space for parking and other facilities to the CAAB at a very high rate. They also do not get any subsidies like Biman, Bangladesh Airlines in respect of payment for the rent of infrastructure including fuel.²⁹ There is also scarcity of sufficient space within the airport area to build huge infrastructures. Under these circumstances, if the policy regime comes forward to help growing infrastructures for the private airlines then only they will sustain. Unless there is infrastructural growth, the private airlines will not sustain for long in this country.³⁰ Due to all these limitations training of private sectors often is being hampered.

Maintenance Facility In order to enhance the hanger and maintenance facility for commercial airlines, Biman Hanger can be utilized. Government may also build some hangers to facilitate the maintenance facility, which in turn could be rented by different private airlines of Bangladesh. BAF expertise personnel can also be utilized in this regard.

24. Alamgir Gp Capt (Retd) loc. cit.

25. Stated by Mizanur Rahman, Member (Finance) CAAB, on an interview by researcher on 23 Jun 2013.

26. Ibid.

27. Ibid.

28. Alamgir, Gp Capt (Retd) loc.cit.

29. Alamgir Gp Capt (Retd) loc.cit.

30. Ibid.

Overdue Bills. The owners of most of the airlines are having tremendous shortcomings to pay the bills of CAAB. Alone Biman has due of about Tk 368 crore to CAAB and United Airways has Tk 28 crore due.³¹ If these dues are paid in time the government could also support and build suitable infrastructure for private entrepreneurs. One must understand the limitation and lack of fund of Bangladesh government.³²

Serviceability of Aircraft and Maintenance of Schedule. The un-serviceability rate of the aircraft of most of the airlines is alarming because of the age-old aircraft and lack of maintenance facilities and infrastructures. These unserviceable aircraft, in one hand, cannot be utilised for the business, on the other hand, payment for the aircraft has to be made to the owner of the aircraft from whom the aircraft is brought on wet lease and thereby, the loss of the airlines is doubled.³³

Analysis

After analysing the problems and limitations, it is revealed that there exists a huge area for development in aviation sector. The national assets like maintenance facility, hanger could be utilized for the development of private airlines and in this regard private airlines will have to take the initiative. BAF expertise in terms of manpower and infrastructure could also be utilized for the development of this sector. It has to be kept in mind that if government has the financial support then she can also look after the interest of private entrepreneurs. Government may also go for joint venture to develop the airport infrastructure, as it is very expensive. We have seen that rate of return in aviation sector is quick, thus in anyway government will be in upper hand. Stopping monopoly of Biman will not only trigger economic activities within the country but also boost our exports to regional and other countries without burdening the government's finances. All these problems and limitations have made the commercial aviation more vulnerable in the competitive world market. Unless the government, facilitators and the entrepreneurs come forward to address all these issues, the chance of the growth of the commercial aviation in our country will always remain uncertain and a far reaching dream.

RECOMMENDATIONS

The recommendations are:

1. The private entrepreneurs and foreign investors should be attracted to invest in the aviation sector. In this regard, the government and the facilitators i.e. the CAAB and the Board of Investment may play a vital role.
2. Effort may be made to build at least 2 maintenance hangers in the airport. The ownership of the hangers may be retained with the CAAB. Private airlines, in turn, may be allowed to use them subject to the payment.

31. Rahman, Mizanur, loc.cit.

32. Ibid.

33. Ibid.

3. The charges/tariffs/taxes for foreign airlines may be increased at least by five times, to match with other regional/neighbouring countries.
4. Overdue bills should be paid to the government by all the users in time, so that future development works can be taken in hand.
5. National interest may be given highest priority in signing bilateral Air Service Agreement with other countries.
6. A massive training program may be taken at the appropriate levels for producing more pilots, engineers, technicians and other flight/ground crews.
7. In order to reduce maintenance cost of private airlines and to ensure optimum utilization of national property, BAF overhauling project and other maintenance facility may be offered to private airlines if required on payment basis.

CONCLUSION

In a world of decreasing barriers to trade, the aviation sector remains a unique engine for innovation and technological progress which provides the power that keeps the nation competitive. Aviation contributes to economic growth and stronger ties to local and global markets for every region in the nation. Although some of the civil aviation's impact cannot be measured quantitatively, however attempts have been made to capture all the economic activity generated by direct and indirect air transport of passengers and cargo using the best data available from government and private sources.

Aviation is a global business and Bangladesh has to get used to it. We can, no longer, think about aviation as governed by the spirit of local imperative. Thinking globally also has produced fundamental changes in how aviation addresses issues such as safety, capacity and the environment. The days of one nation making its own rules and imposing them on the world are gone. Internationally agreed standards and regulations are essential for open markets, free movement and safe skies. It is to this challenge that Bangladesh has to take on the responsibility of making aviation a front-runner in the growth of national economy in terms of service provider to trade expansion both at home and abroad. Also help to build skill and competence of the aviation professionals and those who come in contact with them in their usual business such as, tradesmen, security organizations, entrepreneurs who provide services at the airports.³⁴

With all the limitations still aviation sector has seen a positive growth in last few years. In FY 2011-2012 aviation sector has contributed 0.08% to the national GDP of Bangladesh. The mail and cargo transportation has seen a revolution, from 2001 it is found that in domestic market air transportation has increased by 134.5% and for international cargo, it has increased by 10.42%. This is only direct impact through taxes and revenues,

34. Hossain, AVM Mahmud. *Regional civil aviation initiative in south Asia: The role of Bangladesh*. loc.cit.

which we can quantify easily. Apart from this there are many other factors like, huge job opportunity, infrastructure development, aviation related other business like travel agencies, catering services, restaurants, hotels and many other recreational centres etc have grown in Bangladesh quite rapidly. Above all it is creating huge quality aviation experts/workers which are ultimately contributing in capacity building of the nation.

As it did in the last century, in future also the role of air transportation will continue to grow globally. The economic impacts of commercial aviation quantified in this paper summarize the benefits made possible through timely and vital policy making which will meet the demand of future expansion of this sector. Possible joint investment should be encouraged and liberalization of rules and regulations to encourage more investment in aviation sector must be ensured. We have seen that this sector contributes positively to the trade and commerce, creates high paying jobs, helps keep just-in-time business models. As the role of air transportation evolves and becomes even more integral to our way of life, a safe and efficient air transportation system will continue to be a vital, even essential component of a strong, healthy economy of Bangladesh in the 21st century.

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