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## **Impact of National Aviation Policy-2015 on the Growth of Aviation Sector in Pakistan**

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### ***Abstract:***

*The rationale of this research study is to check the role of National Aviation Policy (NAP)-2015 on the growth of Aviation sector in Pakistan. About 300 individuals from aviation sector of Pakistan were used for data collection by adopting convenience sampling technique. Quantitative approach has been adopted for the collection of primary data, and a questionnaire was developed. Simple percentage method was used in analyzing the questionnaires.*

*This study is the first study of its kind to analyze aviation policy 2015, before none of the researchers has published any research work on this part of aviation sector in Pakistan. Therefore, this research study is an esteemed input to growth of aviation sector research in Pakistan. This sort of field study design will familiarize us to point out transformations in the aviation sector of Pakistan specifically and measures to be taken for the quick development of aviation sector in the Pakistan. The main constraint of this study is that the issues considered in the research work are the specific and the effects of each dimension on NAP-2015 have been checked. Future research should include the effects of every single dimension of NAP-2015 on the dimensions of Aviation sector in Pakistan. As result of the study it has been found that the government should revise NAP-2015 or bring a new policy keeping in view the interests of the general public generally and aviation operators specifically by involving the well reputed consultants/ experts of*

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*the sector on war footing basis. The areas comprised of financial requirements for airline licenses, aircraft age, tax holidays, revision of air services agreements and aircraft manufacturing etc needs special attention. Moreover, development of civil aviation infrastructure and air services routes may also be kept in mind in the processing of the new policy.*

**Keywords:** NAP (National Aviation Policy), GDP (Gross Domestic product), ILS (Instrument Landing System).

### **Introduction:**

Ever since wheel was invented, transportation has been playing its significant role in transportation of men and materials. Dependence of economic activities on transportation has been ever increasing gradually. This research work is to analyze only aviation sector that is one type of transportation as variable in association with economic growth in Pakistan. Recent works on Aviation sector have resulted positive effects of aviation on economic growth of a country. Nearly no attention has been paid to the empirical analysis of the relationship between economic growth and aviation. Focus of this research study is to explore the avenues of aviation sector in Pakistan and its pivotal role in the growth of the overall economy.

Presently, the aviation sector supports about 58.1 million jobs (8.7 million within the sector, working for airlines and at airports) and \$2.4 trillion in global GDP, equal to 3.4% of global GDP.<sup>1</sup> Public spending on civil aviation infrastructure plays a major role in economic development. Developing countries in Asia enjoy steady economic growth at 6.2 % in 2014. Asia's population and income growth are expected to continue through at least the first half of the 21st century. If the current growth rate continues, by 2050, Asia's per capita income could rise by 600% matching Europe and other Western countries, and this growth will generate major changes in the travel market.<sup>2</sup>

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If given due consideration and priority the Aviation sector is capable to transform the socio-economic structure of Pakistan. Aviation is the fastest way to economic uplift of a region. Aviation industry can play a pivotal role in the economic prosperity of Pakistan, as aviation sector generates significant revenues to public exchequer.<sup>3</sup> Moreover, aviation sector creates large number of highly paid jobs. Furthermore, this sector delivers widespread catalytic paybacks to international trade and tourism in the region. All these are the manifestations of the pivotal role that aviation plays in the growth of contemporary global economy. An efficient and profitable aviation sector serves as the strong foundation for the development of nations' economic growth.”<sup>4</sup>

The purpose of this research study is to examine the avenues and issues faced by the aviation operators in the Pakistan. During the course of my research study the answers of the following research questions will be sorted out:

- i. What could be the cumulative effects of open sky policy on the growth of Aviation Sector in Pakistan?
- ii. What will be the impact of present Tax policy on the operations of Aviation operators?
- iii. What will be the impact of present Aircraft age on the operations of Aviation operators?
- iv. How the traditional procedures of working in Aviation sector of Pakistan can affect the development of Aviation industry in the country?

As there has no research work available on the issues raised in this research study in Pakistan. The negative effect of the existing NAP-2015 is a core issue. The study could be continued by future researchers to explore the untouched areas that were not discussed /highlighted in this research study.

The research study has been conducted only in Pakistan and is country specific. Moreover, it is pertinent to mention here that the focal point

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of the research study is only on NAP-2015 impact on the growth of Aviation sector of Pakistan.

### **AIRLINE INDUSTRY IN PAKISTAN**

Pakistan International Airlines Corporation (PIAC) was established in 1955 and is the sole big airline of the country with a fleet of more than thirty passenger aircrafts. Since, its initial phase it has enjoyed heavy support from the governments. The primary leadership of PIAC was established on a sound professional footing. In the history of PIAC, at one stage it was amongst the most vivacious airline in Asia. The development of the airline was the result of the gradual transformation of its human resources and support infrastructure. This human resource produced by the Pakistan Air Force is the sole cascade of trained aviators for the aviation industry in Pakistan.<sup>5</sup> However, the commercial airline industry has experienced rapid changes in its regulatory environment worldwide along with the changes in the other sectors of Economic development. The phase of transformations originates from the United States, with the implementation of the Airline Deregulation Act of 1978 and its expansion to Europe and gradually to the whole world. Till 1980 the regulatory features of aviation industry were changing gradually and the levels of open sky policies were different amongst different regions in accordance to its requirements. However, the status in Pakistan is uncertain, keeping in view the unclear policies of the setting regimes.<sup>6</sup>

After the establishment of an autonomous Civil Aviation Authority (CAA) in 1982 as a regulatory body through an act of parliament, at the behest of the International Civil Aviation Organization (ICAO), to govern and align civil aviation activities in the country with ICAO recommended practices. The newly created CAA faced severe resistance from the main stakeholders of PIA's certain professional cadres and unable to implement ICAO regulation in letter and spirit has badly

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shattered the aviation sector in the country gradually. This situation was to become the main reason for the decline of Pakistan's CAA by ICAO a decade later.

In the early 1990s the government of Pakistan adopted an. The adoption of Open Skies Aviation Policy in the early 1990s has further shattered the growing field of the national flag carrier and the new actors in the aviation sector of Pakistan. The fifth freedom factor has played the most negative role in gaining the actual share of the local airlines' industry. A tough competition scenario has been built for the country's own carriers.<sup>7</sup>

### **WHAT NEEDS TO BE DONE**

Pakistan has to go on protracted benefits' lines to have the benefits of getting a determined civil aviation trade. Whereas the task is definitely large, it's not possible in a single glance. The subsequent steps ought to be taken on a priority basis to ascertain a progressive aviation sector.<sup>8</sup>

Two of the 3 major airline operators incurred sizeable losses throughout FY17 on the rear of upper fuel costs, increasing completion, inefficiencies (particularly for PIA) and different regulative and external factors. within the background of skyrocketing fuel costs, monetary profile of airline operators is anticipated to stay harassed. Adjusted gears levels (accounting for off-balance sheet operative lease payments) still air the upper facet. Interest based mostly bank borrowings square measure thought-about manageable for personal airliners however square measure sizeable just in case of Taccapinnatifida. Route choice strategy and diversification within the same is taken into account vital for stable revenue growth of airline operators.<sup>9</sup>

Details of these hypotheses are given follow;

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**H1:** National Aviation Policy has negative impact on the growth of Aviation sector in Pakistan.

**H2:** Aircraft age given in NAP-2015 has badly affected Aviation operators in the country.

**H3:** Open sky policy has negatively affected the growth of airlines.

**H4:** Tax relief given in NAP-2015 has negative effect on the attraction of passengers.

**H5:** Aircraft manufacturing industry has been ignored in NAP-2015.

As this is a quantitative research thus questionnaires were distributed and each item of the dimensions were measured. The intent to use questionnaires was to investigate relation to show the impact of variables. For conducting this research study, a questionnaire comprised of 09 items has been developed for the data collection.

## **RESULT& DATA ANALYSIS**

### **Statistical Tool for Analysis**

For the analysis of data simple percentage method has been used to derive results. The data was analyzed by the use of statistical tools and opinion was established. About 300 questionnaires were distributed, out of which 144 questionnaires received back to the researcher. Results of established hypothesis as under:-

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## Results

### Results H1

To test hypothesis No.1 three items were used in the instrument for data collection. Following are the results:

S #	Items	Ag re e	Dis agr ee	Don't know
1	Satisfaction with the provisions of National Aviation Policy (NAP)-2015.	23 %	67 %	10%
2	NAP-2015 is helpful in the growth of Aviation sector in Pakistan.	20 %	75 %	5%
3	Is NAP-2015 provisions are helpful for aviation operators in Pakistan.	21 %	76 %	3%

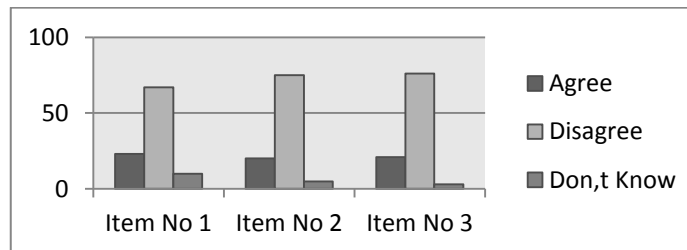
**Table No. 04**

The table depicts that on the item related to satisfaction of the aviation related people to NAP-2015, 23% respondents are satisfied from the provisions of NAP-2015 that is very low ratio for the satisfaction item. Moreover, 67% respondent show their dis-satisfaction with the provisions of NAP-2015 that means that the policy should be revised and a new policy may be formulated with the consent of all and to take all stake holders on the same page. Furthermore, 10% respondents remained dormant and given nil response regarding the issue.

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In item No.2 that is related to the effectiveness of NAP-2015 for the growth of aviation in Pakistan, 20% of the respondents are agree,75% disagree and 5% remained silent on the issue. The results on the issue are clear that majority of the respondents are of the view that NAP-2015 are not helpful for the growth of aviation sector in Pakistan.

On item No.3 that is related to the help fullness of NAP-2015 for the aviation operators in the country the results are almost the same as in item No. 2. The table depicts that 21% of the respondents are of the view that NAP-2015 is helpful, 76% of the respondents are of the view that it is not helpful, however, 3% of the respondents remained silent on the issue. The graphics related to the results are as under:



## Results H2

To test hypothesis No.2 two items were used in the instrument for data collection. Following are the results:

S #	Items	Agr ee	Disag ree	Don,t know
1	The aircraft age for all the operators' fixed in NAP-2015 is satisfactory	15 %	80%	5%
2	Aircraft age fixed in	81	5%	14%



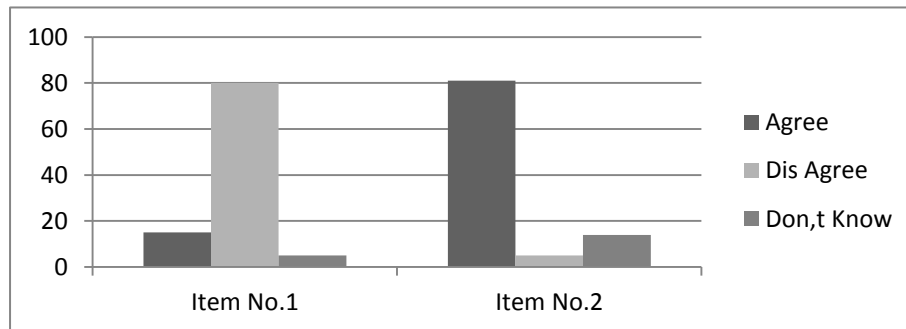
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	NAP-2015 needs to be revised?	%		
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**Table No.5**

The table depicts that in item No.1 which is related to the satisfaction of respondents to air craft age fixed in NAP-2015, 15% of the respondents shown their consent that they are agree with aircraft age fixed in NAP-2018 which is very low, 80% of the respondents has shown their dis-satisfaction on the issue that is very high and one of the main issue faced by the operators. However, 5% of the respondents remained soundless on the issue.

In item No.2 that speaks regarding the revision of the aircraft age 81% respondents shown their consent that age of the air craft should be revised. However, 5% shown disagreement and 14% of the respondents remained silent on the issue. Detailed graphical results of the issues discussed are as under:



### Results H3

To test hypothesis No.3 one item was used in the instrument for data collection. Following are the results:

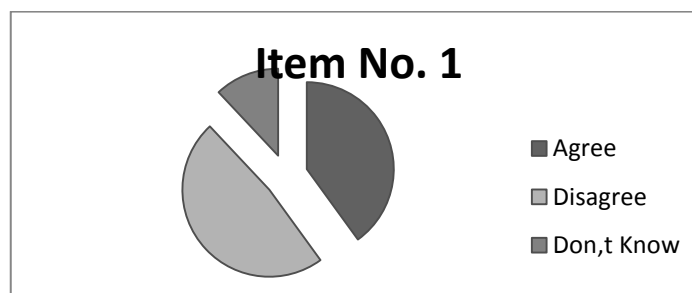
S #	Item	Agr ee	Disag ree	Do n,t kno
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				W
1	Negative Impact of liberalized Open sky policy	40 %	48%	12 %

**Table: No.6**

The table depicts that in item No.1 which is related to negative impact of liberalized open sky policy 40% respondents are of the view that open sky policy have negative impact on the growth of aviation sector in the country. However, 48% respondents have disagreed with the statement as there are so many other factors are involved in the growth of the sector in the country. Furthermore, 12% of the respondents remained silent on the issue. Thus the impact of liberalized open sky policy has least effects on the growth of aviation sector in the country.



**Results H4**

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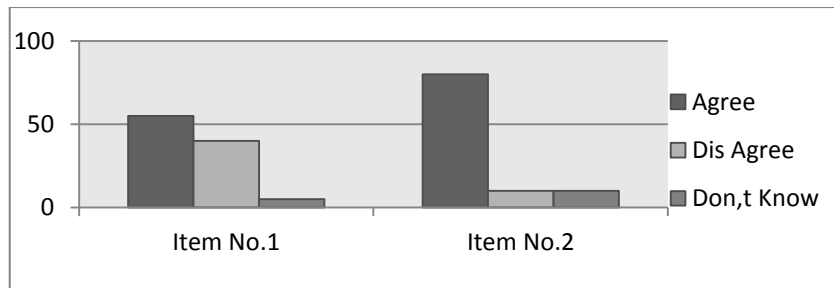
To test hypothesis No.4 three items were used in the instrument for data collection. Following are the results:

S #	Items	Agree	Disagree	Don,t know
1	Tax relief given in NAP-2015 is sufficient?	55 %	40%	5%
2	Tax relief can be helpful in attracting passengers?	80 %	10%	10%

**Table No.7**

The table depicts that in item No.1 which is related to Tax relief given in NAP-2015 is sufficient or not. 55% of the respondents are of the view that there are sufficient reliefs available in the NAP-2015. However, 40% of the respondents are of the view that more relief may be given to attract investors to the industry and getting of more market share. Furthermore, 5% of the respondents were remained silent on the issue.

In item No.2 that is related to the tax relief for attraction of the passengers attraction to the airlines. 80% of the respondents are of the view that tax relief in the fares can leads the airline to gain more market share on both the domestic and international routes. However, 10% of the respondents were disagreeing with the issue and 10% remained silent. Thus the results of the hypothesis proved that tax reliefs given in NAP-2015 haven't negative impact on the growth of aviation sector in the country. However, to attract passengers more tax incentives are required to be given on the passenger fares on both national and international flights. Graphical results of the hypothesis are as under:



**Results H5**

To test hypothesis No.1 three items were used in the instrument for data collection. Following are the results:

S #	Item	Ag re e	Disag ree	Don,t know
1	NAP-2015 has no provisions of aircraft manufacturing in the country?	85 %	5%	10%

**Table No.8**

The table depicts that in item No.1 which is related to the aircraft manufacturing in Pakistan. It's a fact that the present NAP-2015 has no provision of aircraft manufacturing. 85% of the respondents are of the view that no provisions exists in NAP-2015, 5% are disagree with the facts and 10% remained silent on the issue. The graphical representations of the results are as under. The hypothesis is proved that there are no provisions of aircraft manufacturing in NAP-2015.

## Item No.1



■ Agree  
 ■ Dis Agree  
 ■ Don,t Know

### Conclusion and Recommendations

The current study on the impact of NAP-2015 on the growth of aviation sector in Pakistan is the first study of its kind; none has contributed any work on the role of Aviation Policy 2015 in the uplift of Aviation sector in Pakistan. This sort of a field study designed needs to familiarize us and to indicate transformations in the aviation sector in the country. The main constraint of this study done by the researcher is that the issues studied in the research work are the specific effect of each dimension of NAP-2015 has been checked on the dependent variable of growth of Aviation sector in Pakistan. Future research should include the effects of every single dimension of Independent Variable on the dimensions of dependent variable. This research study can be extended to any other aspect of aviation in the country in future.

Following are some recommendations based on the data collected and results declared for the policy makers and aviators in Pakistan:

1. Pakistan shall pursue a bilateral traffic rights policy with other countries based on 3rd/4th freedom point to point organic market growth, in the spirit of commercial reciprocity.
2. In cases where there is insufficient point to point market, 5<sup>th</sup> freedom rights may be negotiated only to supplement 3<sup>rd</sup>/4<sup>th</sup> freedom traffic.
3. Weekly flight operations of foreign carriers to be kept frozen at their present operations.

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4. A moratorium be immediately placed on grant of any future traffic rights to foreign airlines.
5. Gateways offered to foreign carriers in Pakistan need to be restricted only to Karachi, Lahore and Islamabad. All other points like Peshawar, Multan, Faisalabad, Quetta, etc may be offered only as code share points with flights to be only operated by Pakistani carriers.
6. All ASAs to be reviewed on the basis of commercial reciprocity ensuring organic point to point market growth and a level playing field for airlines of Pakistan.
7. Grant of 5<sup>th</sup> freedom to be negotiated only to supplement 3<sup>rd</sup>/4<sup>th</sup> point to point traffic.
8. Grant of capacity to be based on number of passengers or weekly seats keeping in view organic market growth.
9. Prime slots to be reserved for the airlines of Pakistan and priority be accorded to them for push back, take off and landing.
10. Representation of airlines of Pakistan in all in house and formal ASA meetings as was done in the past. A member of the National Carrier be made a permanent member of Pakistan CAA slot committee to be consulted before approving slots for foreign carriers.
11. Pakistan CAA charges should be in PKR instead of USD. Civil Aviation of all countries are charging fee and taxes in their local currencies whereas Pakistan Civil Aviation is charging in USD. It is suggested that all charges for domestic and international flights should be charged in Pak Rupees by PCAA across all airports. Certifications of aircraft and licenses fee as well as other charges by PCAA to Pakistani operators, design and manufacturing organizations, should be in PKR and not in USD.

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12. Charging Air Navigation charges under separate head by PCAA should be discontinued.
13. TA / DA rates for travel of PCAA staff charged to Pakistani operators should be as per government approved policy.
14. It is suggested that PCAA should immediately reduce boarding bridge charges by 75% at Islamabad and by 50% at other stations.
15. Boarding bridge charges in Pakistan are highest in the region. Many countries do not even charge for it, often these charges are embedded in landing charges.
16. In addition to the Terminal Navigation Charges being charged by PCAA, it is also charging Air Navigation Charges on international flights landing and departing from Pakistan; which no other country is charging in the region. Every international flight of airlines of Pakistan has to depart and land in Pakistan and these high charges are making cost of doing business un-competitive for airlines of Pakistan.
17. Taxes and duties on domestic air travel may be exempted (tax holiday) for a period of first five years of the policy to promote domestic air travel. After the holiday period, total taxes and fees should not be more than 10% of the fare charged.
18. FED on Domestic air travel and cargo should be reverted to sales tax mode immediately as previously charged. This will enable national airlines to adjust GST paid on their domestic supplies and fuel etc.
19. As an alternate, GST on fuel and other items consumed for domestic flights may also be exempted as in the case of international flights.
20. Aerobridge charges of PCAA to be brought in line with regional charges.

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21. Landing charges at all airports in Pakistan should be reduced by at least 50% to be brought in line with the region so national airlines can also be competitive.
22. Temporary induction of foreign registered aircraft on wet lease may be permissible up to maximum of 180 days, extendable on the discretion of the Federal Government on the recommendations of DG CAA.
23. The crew/staff of lessor may be required to obtain Business Visa instead of work visa.
24. The licenses of foreign crew would be validated for a maximum of 365 days as long as they are associated with a Wet Lease of an aircraft.
25. The economic health of the airlines is under constant surveillance by the PCAA, therefore, the additional burden of maintaining loss free paid-up capital or negative equity should be waived off.
26. The Highest value License should cover lower value Licenses for Paid Up Capital and Bank Guarantee in the same Class. For example: If an operator gets charter license (international) then it should be deemed to have been granted charter license (domestic) without separately applying for it.
27. Airport Development Authority (ADA): The airports should be developed and managed separately by the creation of a separate body "The Airport Authority of Pakistan" and the regulator "PCAA" should be responsible for regulating ADA. Development of transit lounges for 6<sup>th</sup> freedom traffic, to be supported by transit visa facility
28. Up gradation of facilities at secondary airports .
29. ILS CAT II/III/III B installation where necessary to ensure uninterrupted operations.
30. All alternate airports including Nawabshah to be equipped for wide body operations and night landing to handle diversions.



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31. Runway extension where necessary for aircrafts to operate at full payloads.
32. Land at airside and landside should be allocated to operators and direct allied businesses at reduced rates.
33. To promote exports of the country, a dedicated classification should be made for cargo only operators.
34. A separate classification should be made for Cargo Only Operators.
35. Paid-up capital, deposits, etc. should have lower limits for those wishing to operate an All Cargo Airline.
36. Pakistan CAA to ensure establishment of dedicated cold chain and perishable facility at all major domestic airports as Public Private Partnership arrangement.
37. The license fee for the Pakistan CAA spaces on apron side and in the airport office complexes should be at a reduced rate for a new start-up and this rate should be extended for at least first year of operations as charging a new start-up at the same rate as an operator already in service gives the latter a competitive price advantage.
38. Scheduled commuter service should be exempted from Pakistan CAA embarkation fee, federal and provisional taxes and duties for at least initial 03 years or discounted charges be considered.
39. Primary and Secondary routes may also be included in schedule commuter services under charter license specially for those routes where there is no service or are under served.
40. The condition to wait for 2 years before an application can be considered for conversion from Charter class 2 (CHTL2) to RPT be reduced to 6 months of successful operations and subject to only

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increase of Paid Up capital and increase in number of aircrafts while meeting all AOC requirements for RPT.

41. PCAA to facilitate work visas & security clearances for foreign Instructor pilots, engineers and cabin crew instructors to start the initial operations. In order to support such operations, PCAA may be designated as the centre point for decision making to facilitate the operators.
42. PCAA functions as a regulator and service provider to be delinked as it creates a conflict of interest for PCAA. Expenses for PCAA as a regulator to be looked after by the Government in order to ensure the role is not commercially driven.
43. Procedure for payments of Aircrafts inducted by all operators to be simplified especially with reference to smooth transfer out of USD to Lessor/Seller.
44. Imposition of age restricted duties on ground handling equipment must be rationalized and relaxed for fully refurbished equipment older than 05 years.
45. An institute with affiliation to foreign/internationally reputed organizations, IST (institute of space technology), Islamabad can be considered. For a quick solution, IST may be given the status after getting due recognition by MOA/PCAA.
46. Type Training for CAA Inspectors Flight Standards and Airworthiness to be stopped. If the facility is approved by the OEM / CAA of that respective Country then their facility and Simulator Check Reports should be accepted by CAA Pak.
47. CAA License conversion to be 1 Paper Revalidation only. Whether the license is from ICAO, FAA, EASA, GCA or any Contracting State.

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48. CAA Licensing to preferably work under Directorate of Flight Standards (DFS) or in close coordination with DFS.

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