

Nepal's Aviation Crossroads: Bridging Infrastructure Ambition with Sustainable Tourism Reality

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Executive Summary

This report provides a comprehensive analysis of the symbiotic and often fraught relationship between airport infrastructure and the tourism sector in Nepal. Tourism stands as a cornerstone of the national economy, and its revitalization and expansion, as envisioned in the government's ambitious "Visit Nepal Decade (2023-2032)" plan, are fundamentally predicated on a capable and efficient aviation sector. The analysis reveals a critical paradox: while Nepal has made substantial capital investments in modernizing its aviation infrastructure—including major upgrades to Tribhuvan International Airport (TIA) and the construction of two new international airports at Pokhara (PIA) and Bhairahawa (GBIA)—these assets are failing to deliver their intended economic benefits.

The core finding of this report is a systemic and perilous disconnect between Nepal's infrastructure-led development strategy and the complex realities of geopolitics, operational viability, aviation safety, and socio-environmental sustainability. The new international airports, intended to be catalysts for growth, are severely underutilized, primarily due to unresolved airspace access issues with India, which renders them operationally inefficient and commercially unattractive to international airlines. This has created a precarious financial situation, particularly for the Chinese-funded Pokhara airport, fueling concerns of a potential "debt trap" and leaving local economies that invested heavily in anticipation of a tourism boom in a state of crisis.

Compounding this issue is Nepal's persistent and globally recognized poor aviation safety record. Systemic weaknesses, most notably the institutional conflict of interest within the Civil Aviation Authority of Nepal (CAAN), have led to a long-standing EU air safety ban, which acts as a direct impediment to accessing high-value tourism markets and tarnishes the nation's reputation. Despite international pressure and financial support from partners like the Asian

Development Bank (ADB) to reform the sector, the necessary legislative action to ensure independent regulatory oversight has been paralyzed by political gridlock for years.

Furthermore, the pursuit of large-scale airport projects has exacted a significant and often underestimated socio-environmental toll. The proposed Nijgadh International Airport, now halted by the Supreme Court, represents an impending ecological catastrophe, while other projects have been marred by flawed environmental assessments, conflicts over land acquisition, and the displacement of marginalized communities. These factors are not mere externalities; they have manifested as direct financial liabilities, causing project delays, cost overruns, and operational hazards.

This report concludes that Nepal is at a critical crossroads. Continuing with a fragmented, supply-driven infrastructure strategy without addressing the foundational issues of diplomacy, regulatory reform, and sustainability is a path toward fiscal strain and unrealized potential. A strategic pivot is urgently required. The following top-level recommendations are put forth:

1. **Elevate Diplomacy Above Construction:** Prioritize securing binding airspace agreements with India before any further major airport investment.
2. **Execute Regulatory Reform as a National Priority:** Immediately pass the legislation to bifurcate CAAN, framing it as an essential economic enabler for tourism.
3. **Adopt a "Viability First" Infrastructure Policy:** Impose a moratorium on the Nijgadh project and focus on maximizing the utility of existing airports.
4. **Integrate Social and Environmental Risk into Financial Planning:** Reform the Environmental and Social Impact Assessment (ESIA) process into a binding, upfront component of project feasibility.
5. **Realign Tourism Strategy from "Volume" to "Value":** Shift the focus of the "Visit Nepal Decade" from purely quantitative arrival targets to a qualitative strategy aimed at attracting higher-spending tourists to ensure economic and environmental sustainability.

Section 1: The Symbiotic Relationship: Aviation and Tourism as Pillars of Nepal's Economy

This section establishes the strategic context, detailing tourism's vital role in Nepal's economy and the government's ambitious vision for its future, which is fundamentally dependent on aviation.

1.1 The Economic Cornerstone: Quantifying Tourism's National Importance

Tourism is not merely an industry in Nepal; it is a fundamental pillar of the national economy, consistently identified as a cornerstone for its significant contributions to Gross Domestic Product (GDP), foreign exchange earnings, and employment.¹ In the pre-pandemic benchmark year of 2019, the tourism sector supported over one million direct and indirect jobs and accounted for approximately 6.7% of the nation's GDP.⁴ The sector's importance is further magnified in remote and resource-constrained regions, where an estimated 80% of these jobs are located, making tourism a critical vehicle for regional development and poverty alleviation.³

The COVID-19 pandemic dealt a catastrophic blow to this vital sector. Tourist arrivals, which had reached a peak of 1.2 million in 2019, collapsed to just 230,000 in 2020 and a low of 150,000 in 2021.¹ However, the post-pandemic recovery has been robust, signaling the sector's inherent resilience. Arrivals climbed back to 1,014,876 in 2023 and are reported to have reached 1,147,567 in 2024, representing a recovery to 96% of pre-pandemic levels.³ This recovery has been a key driver for the broader economy; in Fiscal Year 2024, a 30.7% surge in tourist arrivals was the primary impetus for growth in the services sector, boosting transportation, accommodation, and food services.⁶

An indelible link exists between this economic performance and the aviation sector. The vast majority of international visitors, particularly those from higher-spending, long-haul markets, arrive by air. Official data indicates that over 80% to 90% of international tourists enter Nepal via its airports, making aviation the principal gateway for tourism revenue.⁷ Analysis of tourist demographics underscores this dependency. While India remains the largest single source market, accounting for 38.7% of air arrivals in a sample month like July 2025, significant and growing numbers of tourists also arrive from China, the United States, and various European nations.⁵ These visitors are drawn to Nepal for a diverse range of purposes, including holiday vacations, adventure tourism such as trekking and mountaineering, and religious pilgrimages to sites like Lumbini and Janakpur.¹

Despite the positive recovery in arrival numbers, a critical analysis by the World Bank reveals a concerning underlying trend. Even as visitor numbers rose sharply before the pandemic, tourism receipts declined on a per-capita basis. The average expenditure per international visitor was a mere US\$48 per day in 2019—almost half the global average and a third of that in competing destinations like Thailand and India.⁴ This points to a significant risk of Nepal becoming a "low-value mass tourism destination," where increasing footfall places greater strain on fragile natural and cultural assets for diminishing economic returns.⁴ This disconnect

between arrival volume and economic value presents a fundamental challenge to the country's long-term tourism strategy.

Year	Total Tourist Arrivals (Air & Land)	Arrivals by Air (%)	Top 5 Nationalities (by Air)	Average Length of Stay (Days)	Average Expenditure per Visitor/Day (USD)	Total Tourism Foreign Exchange Earnings (USD million)
2018	1,173,072	82.8%	India, China, USA, UK, Sri Lanka	12.4	\$54	\$651 (FY2019)
2019	1,197,191	80.0%	India, China, USA, UK, Sri Lanka	12.7	\$48	\$2,200 (Total Impact)
2020	230,085	76.5%	India, China, USA, Myanmar, Thailand	15.1	\$65	\$217
2021	150,962	90.1%	India, USA, UK, China, Bangladesh	15.5	\$48	\$112.5
2022	614,148	89.0%	India, USA, UK,	13.1	\$40.5	\$326.28

			Australia, Bangladesh				
2023	1,014,876	90.1%	India, USA, China, UK, Australia	13.1	\$41	N/A	
2024	1,147,567	N/A	India, China, USA, UK, Germany	N/A	N/A	N/A	
Data compiled from MoCTCA ¹ , NTB ⁵ , World Bank ⁴ , ADB ² , and Wikipedia. ³ Note: Data points across sources may vary slightly; this table represents a synthesized view. Earnings for 2019 represent							

total economic impact as reported by the World Bank, while other years reflect direct foreign exchange earnings.							
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1.2 The "Visit Nepal Decade (2023-2032)": A National Strategy for Growth

In response to the pandemic-induced crisis and to chart a long-term course for the sector, the Government of Nepal, through the Ministry of Culture, Tourism, and Civil Aviation (MoCTCA) and the Nepal Tourism Board (NTB), has launched the "Visit Nepal Decade (2023-2032)".¹² This strategic framework replaces previous short-term campaigns with a sustained, decade-long vision for tourism development.¹⁴

The goals of the plan are exceptionally ambitious. The headline targets include attracting 3.5 million international tourists annually by the end of the decade (excluding overland arrivals from India), more than tripling the daily expenditure per tourist to \$125, creating one million new direct jobs in the sector, and elevating tourism's contribution to the national GDP to 10%.⁸ The plan aims to restore tourist numbers to pre-pandemic levels by 2024 and then achieve a 15% year-on-year increase thereafter.¹⁶

The strategy is structured into distinct phases: a "Consolidation" phase in 2023 to solidify past gains, a "Preparation" phase from 2024-2027 focusing on marketing and infrastructure improvement, and a "National Focus" phase from 2028-2031 to promote Nepal as a year-round destination and tap into new markets.¹² A key innovation in this plan is a year-by-year promotional focus on different provinces. This is designed to diversify tourism products,

highlight lesser-known destinations like the Rara Lake or Mundum Trail, and alleviate the pressure of over-tourism on traditional hubs like the Everest and Annapurna regions.¹²

The entire edifice of the "Visit Nepal Decade" rests on the assumption of a massively expanded and more efficient aviation sector. Achieving a target of 3.5 million air-arriving tourists is a physical impossibility without a profound enhancement of airport capacity and international connectivity. The plan's architects explicitly acknowledge this dependency, citing the operationalization of Gautam Buddha International Airport (GBIA) and Pokhara International Airport (PIA) as foundational steps for the decade's success.¹² This makes the performance of Nepal's airport infrastructure not just a supporting factor, but the central, critical variable upon which the national tourism strategy hinges.

However, a fundamental contradiction appears to be embedded within this national strategy. While the plan articulates a clear goal of increasing the *value* of tourism (raising daily spending from \$48 to \$125), its core operational logic is overwhelmingly focused on increasing *volume* (reaching 3.5 million arrivals). The primary strategic action highlighted is the supply-side solution of building and operating new airports, with the implicit assumption that this infrastructure will automatically deliver the desired number of tourists. This approach lacks a sophisticated, corresponding demand-side strategy to specifically target and attract the high-value tourists who would spend \$125 per day. It risks exacerbating the very trend of low-value mass tourism that the World Bank has identified as a key economic vulnerability. This misalignment suggests a potential for "successful failure"—a scenario where Nepal might approach its ambitious arrival targets while simultaneously failing to meet its economic contribution goals, all while placing unprecedented strain on its natural and cultural heritage.

Section 2: The State of Nepal's Aviation Infrastructure: A Triptych of Modernization, Congestion, and Controversy

This section provides a comprehensive assessment of Nepal's airport infrastructure, from its primary international gateway to its controversial future projects, establishing the physical capacity and limitations of the system.

2.1 Tribhuvan International Airport (TIA): The Overburdened Lifeline

For decades, Tribhuvan International Airport (TIA) in Kathmandu has served as Nepal's sole international gateway and the primary hub for its domestic air network.²⁰ It is the lifeline for the nation's tourism industry, handling over 80% of all international visitors.⁷ However, this critical role has been severely compromised by chronic congestion and operational constraints. Designed decades ago, the airport has long operated far beyond its intended capacity, leading to notorious delays, airside traffic jams, and overcrowded terminals that create a bottleneck for the entire country.⁷ In 2019, TIA handled over 7.3 million passengers, exceeding its landside design capacity by an estimated 4 million passengers.⁷

To address this critical deficiency, the Government of Nepal, with significant financial and technical support from the Asian Development Bank (ADB), has embarked on the Air Transport Capacity Enhancement Project.²² This multi-faceted upgrade aims to modernize TIA and enhance its safety and efficiency. Key components of this ongoing project include:

- **Airside Improvements:** The single runway, a major constraint, was extended to 3,350 meters in 2020.²⁴ A crucial element of the upgrade is the construction of a parallel taxiway system. This development is designed to significantly reduce runway occupancy time for arriving and departing aircraft, theoretically increasing the airport's handling capacity from one aircraft every seven minutes to one every four minutes.²³
- **Terminal and Apron Expansion:** The project involves expanding the international departure and arrival halls to accommodate more passengers, with plans to eventually reconfigure the entire existing international terminal for domestic operations.²⁴ A new, much larger international terminal building, with a capacity to handle 10 million passengers annually, is also part of the master plan.²⁵ Aircraft parking aprons have been expanded to provide more stands, including for wide-body aircraft, and facilities for Nepal Airlines and the Nepal Army are being relocated to make way for the new terminal.²³

The extensive construction has necessitated significant operational adjustments. From November 2024 to March 2025, TIA was closed overnight for ten hours (from 10 PM to 8 AM) to allow construction work to proceed safely.²⁶ This led to the curtailment of many late-night and early-morning flights and exacerbated congestion during the reduced operational window. As of April 1, 2025, the airport has resumed an 18-hour operational day, from 6 AM to 12 AM, as major linkway construction was completed.²⁹

2.2 The New International Gateways: Ambition Meets Reality

In a landmark shift in aviation policy, Nepal has expanded its international airport portfolio from one to three. This expansion is central to the government's strategy of decentralizing tourism, alleviating pressure on TIA, and opening new direct corridors for international visitors.

Gautam Buddha International Airport (GBIA), Bhairahawa: Inaugurated in May 2022, GBIA is Nepal's second international airport.³¹ Located near the UNESCO World Heritage site of Lumbini, the birthplace of Lord Buddha, the airport was developed with support from the ADB.³² It features a 3,000-meter runway and modern facilities, and was strategically envisioned to serve as a reliable alternative to TIA and a primary gateway for the millions of Buddhist pilgrims who visit the region annually.²⁰

Pokhara International Airport (PIA): Inaugurated in January 2023, PIA is the country's third international airport and arguably its most anticipated.³³ Located in Pokhara, Nepal's premier tourist city, the airport was constructed with a \$216 million loan from the Export-Import Bank of China.³⁴ Designed to ICAO 4D standards with a 2,500-meter runway, PIA is intended to handle up to one million passengers per year, allowing tourists to fly directly into the heart of the Annapurna trekking region.³⁴

The Domestic Network: Beyond these international hubs, the Civil Aviation Authority of Nepal (CAAN) manages a network of 34 operational domestic airports.³⁸ Many of these, such as Tenzing-Hillary Airport in Lukla or Jomsom Airport, are situated in extremely challenging mountain terrain and serve as indispensable lifelines for remote communities and trekkers. In line with its broader modernization efforts, CAAN has also undertaken substantial upgrades to key domestic hubs, including Biratnagar, Nepalgunj, and Bharatpur. Critically, paved runways have been completed at airports in Kalikot and Resunga, significantly improving all-weather connectivity and safety in previously hard-to-reach areas.³⁶

2.3 The Nijgadh International Airport (NIA) Dilemma: A Grand Vision on Hold

The most ambitious and controversial project in Nepal's aviation history is the proposed Nijgadh International Airport (NIA). Envisioned as a massive hub airport located on the Terai plains, approximately 68 km south of Kathmandu, NIA is planned to be the largest airport in South Asia.³⁹ With proposals for multiple runways and a capacity to handle tens of millions of passengers, the government has promoted it as the ultimate solution to TIA's constraints and a "game-changer" that could transform Nepal into a regional aviation transit hub.³⁹

However, the project is mired in profound controversy. In a landmark decision in 2022, the Supreme Court of Nepal halted all work on the project, citing a deeply flawed Environmental

Impact Assessment (EIA).³⁹ The proposed site covers over 8,000 hectares of dense, old-growth Sal forest, a critical habitat and wildlife corridor connecting Parsa National Park.⁴⁰ The EIA called for the felling of an estimated 2.4 million trees, an action that conservationists and environmental scientists have warned would cause a devastating and irreversible ecological catastrophe, destroying the habitat of endangered species including Bengal tigers and Asiatic elephants.³⁹

The social costs are equally severe. The project would require the displacement of nearly 8,000 people from established settlements like Tangiya Basti, many of whom are from marginalized communities and lack formal land titles, leaving them in a precarious position regarding compensation and resettlement.⁴⁴

As of 2025, the NIA project remains officially on hold pending a comprehensive reassessment as ordered by the court. Despite this, the government continues to signal its commitment to the project, prioritizing it in budget speeches and exploring alternative financing mechanisms.⁴⁷ Meanwhile, construction of the Kathmandu-Terai Expressway, a fast-track road intended to connect the capital to the proposed airport site, continues, symbolizing the government's unresolved ambition.³⁹

The evolution of Nepal's airport infrastructure reveals a pattern of reactive and fragmented planning rather than a cohesive, integrated national strategy. The upgrades at TIA are a belated response to decades of well-documented congestion. The construction of PIA and GBIA was driven by a desire to alleviate this pressure, yet their development proceeded without first securing the geopolitical agreements necessary for their operational success. The persistent political push for the environmentally and socially calamitous Nijgadh project, despite the Supreme Court's intervention and the underperformance of the two newly built airports, suggests a "build at all costs" mentality. This approach prioritizes large, standalone capital projects over a holistic system-wide plan that considers operational viability, financial sustainability, and phased implementation in a coordinated manner. The result is a paradoxical and inefficient national aviation system: a congested primary airport undergoing disruptive upgrades, two expensive new airports sitting largely empty, and a third, potentially ruinous airport remaining a contentious political priority.

Airport	Locatio n	Status	Run way Lengt h (m)	Termin al Capaci ty	Key Financie r / Partner	Stated Strategic Purpose	Major Identified Issues
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				(pax/year)			
Tribhuvan Int'l (TIA)	Kathmandu	Operational	3,350	7.3 million (pre-upgrade)	ADB, Govt. of Nepal	Primary international gateway and domestic hub	Chronic congestion, operational delays, terrain constraints
Gautam Buddha Int'l (GBIA)	Bhairahawa	Operational	3,000	~1 million	ADB, OPEC Fund	TIA alternative; Gateway for Buddhist pilgrims to Lumbini	Severe underutilization, lack of airline interest, airspace/ILS issues
Pokhara Int'l (PIA)	Pokhara	Operational	2,500	1 million	China EXIM Bank	Direct access to tourism hub; TIA alternative	Severe underutilization, financial crisis ("debt trap"), airspace issues, bird strike risk

Nijgad h Int'l (NIA)	Bara District	Propose d (On Hold)	3,600 (Phas e 1)	6.7 million (Phase 1)	TBD (seeking investm ent)	Future primary hub; Game- changer for econom y	Environme ntal catastroph e, social displaceme nt, Supreme Court halt
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Data compiled from CAAN ³⁶, ADB/World Bank ⁷, and various analytical reports.³⁹

Section 3: The Performance Paradox: Analyzing New Airport Underutilization

This section addresses the critical disconnect between the significant investment in new airports and their current failure to attract substantial and sustained international traffic, exploring the financial, geopolitical, and operational causes.

3.1 The Geopolitical Bottleneck: The Indian Airspace Hurdle

The single greatest impediment to the success of both Pokhara International Airport (PIA) and Gautam Buddha International Airport (GBIA) is not technical or financial, but geopolitical. Both airports, located in close proximity to the Nepal-India border, are severely handicapped by India's persistent refusal to grant new, direct air entry routes from the west.²¹ Under the current regime, international aircraft approaching from the west cannot fly directly to these airports. Instead, they must follow a circuitous path, flying deep into Nepali airspace to an entry waypoint near Simara in central Nepal, before executing a sharp turn to fly back westwards for their final approach.⁵⁰

This procedure is profoundly inefficient. It significantly increases flight time, fuel consumption, and operational costs, making the routes commercially unattractive for international airlines that operate on thin margins. The rationale behind India's stance is widely believed to be rooted

in national security and strategic concerns. GBIA is located less than 10 km from the border and near the major Indian Air Force base at Gorakhpur, while PIA's flight paths could also be seen as sensitive.⁵⁰ Furthermore, China's role as the financier, builder, and promoter of PIA as a Belt and Road Initiative (BRI) project—a claim Nepal has quietly rejected—has undoubtedly added a layer of geopolitical complexity, drawing the project into the broader strategic competition between New Delhi and Beijing.⁵¹ This airspace blockade effectively strangles the two new airports at birth, rendering them incapable of functioning as the true international gateways they were designed to be and nullifying their primary strategic purpose.²¹

3.2 Financial Unviability and the "Debt Trap" Narrative

The operational paralysis caused by the airspace issue has precipitated a severe financial crisis for the new airports, most acutely at Pokhara.

Pokhara's Financial Crisis: Built with a \$216 million loan from China's EXIM Bank, PIA is facing a dire financial situation.³⁵ The airport's original feasibility study projected 280,000 international passengers by 2025 to ensure profitability.⁴⁹ The reality is starkly different. In its first year of operation, it handled only a handful of chartered flights and a negligible number of international passengers.³³ With loan repayments scheduled to begin in 2026, the airport is generating revenue that is insufficient to even cover its operational costs of \$3-4.6 million, let alone service the estimated \$16.6 million in annual principal and interest payments.⁴⁹ This has fueled a powerful and widespread narrative, both domestically and internationally, that PIA is a cautionary tale of a Chinese-funded "debt trap," where a high-cost, low-return infrastructure project leaves the host nation with crippling debt.⁵³ The government of Nepal has reportedly requested that China convert the loan into a grant to alleviate the financial burden, a prospect that seems unlikely given the circumstances.³⁵

Gautam Buddha's Losses: GBIA faces a similar, if less politically charged, predicament. The airport is currently operating at an annual loss of approximately Rs100 million (around \$750,000), with revenues from limited flights failing to meet operational costs.⁴⁸ The economic fallout extends far beyond the airport's balance sheet. Local entrepreneurs, particularly in the hospitality sector, invested an estimated Rs80 billion (over \$600 million) in new hotels and businesses in anticipation of a tourism boom that has failed to materialize. Many of these businesses now face financial collapse, and local communities have staged protests demanding the government take action to bring regular flights.⁴⁸

The lack of airline interest is a direct consequence of this financial and geopolitical uncertainty. Despite incentives offered by CAAN, such as waived landing and parking fees, major

international carriers have been reluctant to commit to regular, sustained services.⁴⁸ The combination of inefficient routes, high operational costs within Nepal, and a perceived lack of aggressive and coordinated market promotion by Nepali authorities has made the business case for flying to PIA or GBIA untenable for most airlines.²¹

3.3 Operational and Technical Deficiencies

Beyond the overarching geopolitical and financial problems, the new airports have also been plagued by specific operational and technical shortcomings.

A critical issue at GBIA has been the delayed operationalization of its Instrument Landing System (ILS). An ILS is essential for enabling aircraft to land safely in the low-visibility conditions, such as dense winter fog, that are common in the Terai region.⁵⁶ However, the full and proper calibration and use of the ILS at GBIA requires aircraft to enter Indian airspace during the approach path. This created a technical dependency that was compounded by the geopolitical standoff, leaving the airport without a key all-weather capability for a significant period after its inauguration.⁵⁶ While India reportedly granted clearance for ILS use in June 2023, its consistent and reliable implementation remains a point of concern.³¹

Furthermore, both airports have suffered from a lack of essential supporting ground services and local infrastructure. At GBIA, passengers have been inconvenienced by the absence of on-site offices for crucial services like labor approvals, medical checks, and visa processing, forcing many to transit through Kathmandu anyway and defeating the purpose of a direct international flight.⁵⁸

The PIA project has been uniquely dogged by allegations of corruption and substandard construction quality. A parliamentary sub-committee investigation and international media reports have highlighted irregularities in the procurement process, inflated costs, and engineering flaws that raise safety concerns.³⁵ Such reports can only serve to further deter reputable international airlines from operating at the airport.

3.4 Recent Developments (2025)

After more than two years of operational stagnation, PIA saw a glimmer of hope in the spring of 2025. In April, Himalaya Airlines, a Nepal-China joint venture, commenced the airport's first-ever scheduled international service: a weekly flight connecting Pokhara with Lhasa, China.⁵⁵

Concurrently, China's Sichuan Airlines began a series of commercial charter flights from Chengdu.⁵⁵ These developments, timed to coincide with a "Visit Pokhara Year 2025" campaign and a "Visit Nepal 2025" promotion in China, are a positive step. However, a few weekly flights are a mere drop in the ocean compared to the volume required to make a \$216 million airport financially viable. They do not resolve the fundamental issues of airspace access from the west or the lack of interest from a diverse range of international carriers.

The experience with Nepal's new airports reveals a critical failure in the country's strategic planning: a profound underestimation of non-technical, external risks. The investment of hundreds of millions of dollars in state-of-the-art physical hardware was made on the flawed assumption that technical completion would guarantee operational success. The "software"—the essential bilateral agreements for airspace access—was not secured beforehand. This has placed Nepal in a position of extreme weakness, having already incurred the debt and built the infrastructure, it must now negotiate for the access that makes it usable from a position of desperation rather than strength. This sequence fundamentally alters the cost-benefit analysis of these projects after the fact and serves as a stark lesson for a landlocked nation whose economic ambitions are inextricably linked to the political goodwill of its neighbors.

Section 4: The Persistent Shadow: Nepal's Aviation Safety Record and Regulatory Reform

This section critically evaluates Nepal's reputation as one of the world's most challenging aviation environments, analyzing the systemic causes and the slow, difficult path toward regulatory reform.

4.1 A Legacy of Risk: Analyzing Causal Factors

Nepal's aviation sector operates under the persistent shadow of a grim safety record, which ranks it among the most dangerous places to fly in the world. The statistics are stark: over 360 people lost their lives in air crashes between 2000 and 2024, with at least 12 fatal commercial airplane accidents in the 2010-2024 period alone.⁶¹ A detailed analysis of accidents from 2010 to 2023 reveals that a majority resulted in 100% fatalities, indicating that surviving a crash in Nepal is exceptionally difficult.⁶³ This poor record is not the result of a single flaw but a confluence of deeply entrenched causal factors.

- **Terrain and Weather:** The primary and most obvious challenge is Nepal's geography. The country is home to eight of the world's ten highest peaks, and a significant portion of its domestic air network involves flying into remote airports nestled in treacherous mountain valleys or situated on "tabletop" runways with sheer drops at either end.⁶² This terrain, combined with highly unpredictable and rapidly changing weather patterns, creates an inherently high-risk operating environment.⁶⁶ The leading cause of fatal accidents in Nepal is Controlled Flight Into Terrain (CFIT), where a pilot inadvertently flies a perfectly functional aircraft into the ground, a mountain, or another obstacle, often due to poor visibility.⁶²
- **Infrastructure and Fleet:** These geographical challenges are exacerbated by technological and infrastructural deficits. Many domestic airlines operate aging turboprop aircraft that may lack the sophisticated navigation and warning systems found on more modern fleets.⁶² A critical weakness is the lack of modern, widespread weather forecasting and monitoring equipment, which limits pilots' situational awareness.⁶⁶
- **Human and Institutional Factors:** While geography sets the stage, investigations have frequently pointed to human error and institutional failures as direct causes of accidents. Poor decision-making by flight crews, a lack of awareness of standard operating procedures, and regulatory breaches have been cited in several major crashes.⁶² A degree of complacency or overconfidence among even experienced pilots has also been identified as a contributing factor.⁶⁶

The culmination of these systemic risks led the European Union to impose a blanket ban on all Nepali airlines from flying in its airspace in 2013.²¹ Crucially, this is not a ban on specific airlines but on Nepal's entire aviation oversight system, signifying a profound lack of confidence from the international community in the country's ability to ensure safety.⁶⁹

4.2 The Core Institutional Flaw: CAAN's Conflict of Interest

At the heart of Nepal's systemic safety problem lies a fundamental institutional flaw, a point repeatedly emphasized by international bodies including the ADB, the International Civil Aviation Organization (ICAO), and the European Union. The Civil Aviation Authority of Nepal (CAAN) operates with a debilitating conflict of interest: it serves as both the sector's primary service provider (owning and operating the nation's airports) and its chief regulator (responsible for safety oversight, licensing, and accident investigation).²

This dual role is untenable in a modern aviation system. It means the regulator is responsible for policing its own operational and financial performance, creating a powerful disincentive for rigorous, independent oversight. This conflict of interest is seen as the root cause of the weak safety culture, inadequate oversight, and the failure to robustly address safety deficiencies identified in international audits.²

4.3 The Long Road to Reform: Safety Plans and Legislative Gridlock

The Government of Nepal and CAAN have not been entirely idle in the face of these challenges. Spurred by international pressure, they have developed successive National Aviation Safety Plans (NASP), such as the NASP 2018-2022 and the updated NASP 2023-2025.⁶⁵ These plans, aligned with ICAO's global framework, identify high-risk occurrence categories (like CFIT and Loss of Control in Flight) and outline initiatives to strengthen safety management and oversight capabilities, particularly in areas found to be weak by ICAO audits.⁶⁵

Furthermore, the ADB has directly targeted the core institutional flaw with its Civil Aviation Sector Improvement Program. This \$50 million policy-based loan is not for building physical infrastructure, but for providing budget support and technical assistance for the specific purpose of restructuring CAAN.² The program's primary objective is to facilitate the legal and operational bifurcation of CAAN into two separate, independent entities: a regulatory body and an airport and air navigation service provider.

Despite this clear roadmap and dedicated international funding, the reform has been paralyzed by political and bureaucratic inertia. The two crucial pieces of legislation required to split CAAN—the Civil Aviation Authority of Nepal Bill and the Air Service Authority of Nepal Bill—have been languishing for years. They have been repeatedly tabled in cabinet and parliament only to be shelved or allowed to lapse due to changes in government, political infighting, and reported resistance from vested interests within the aviation sector itself.⁶⁹ This legislative gridlock represents a failure to implement the single most critical reform recommended by the entire international aviation community.

The inability to enact this fundamental regulatory reform is not merely a technical failure; it is a profound strategic failure with direct consequences for Nepal's economic ambitions. The "Visit Nepal Decade" aims to attract a global and diverse tourist base, yet the persistent EU air safety ban effectively seals off a lucrative, high-value European market. The explicit condition for lifting this ban is the demonstrable improvement of Nepal's safety oversight system, with the bifurcation of CAAN being the non-negotiable first step. Therefore, passing these two bills is not just an aviation matter; it is one of the most impactful and cost-effective actions the

government could take to unlock the tourism sector's potential. The ongoing political failure to do so represents a self-inflicted wound, where the cost of legislative inaction can be measured directly in lost tourism revenue, diminished international standing, and the continued tarnishing of Nepal's global brand.

Section 5: The Unsettled Ledger: Socio-Environmental Impacts of Airport Development

This section provides a detailed account of the significant, and often downplayed, social and environmental costs of airport construction, drawing on EIA reports and NGO analysis.

5.1 The Environmental Toll: Deforestation, Biodiversity, and Habitat Loss

The pursuit of large-scale aviation infrastructure in Nepal has come at a significant environmental cost, raising serious questions about the sustainability of the country's development model. The proposed Nijgadh International Airport stands as the most alarming example. The project, as initially conceived, would require the clearing of over 8,000 hectares of dense, native Sal forest, one of the last remaining tracts of its kind in the eastern Terai.³⁹ This is not an empty forest; it is a biodiversity hotspot, providing habitat for an estimated 500 bird species, 33 mammal species, and numerous endangered flora and fauna, including the iconic Bengal tiger and Asiatic elephant.³⁹ The forest serves as a vital part of the buffer zone for Parsa National Park and is a critical North-South wildlife corridor within the broader Terai Arc Landscape conservation area.⁴² The felling of an estimated 2.4 million trees would trigger what environmentalists have termed an "irreparable" and "devastating" ecological catastrophe, leading to massive biodiversity loss, disrupting regional hydrology, and compromising a crucial carbon sink.⁴⁰ It was the profound inadequacy of the project's EIA in addressing these impacts that led the Supreme Court to halt the project, a decision hailed by conservationists nationally and internationally.³⁹

While less catastrophic in scale, the development of Pokhara International Airport also reveals significant flaws in environmental assessment. Independent analysis and reports from NGOs like the Pokhara Bird Society have shown that the project's EIA largely ignored the significant risk of bird strikes, despite Pokhara being a known "vulture capital" and habitat for nine vulture species.¹⁰ The airport's runway was constructed directly in the flight path of these large, high-risk birds, and its proximity to the Bijaypur River and a former landfill site acts as a natural attractant.⁵¹ The predictable outcome occurred less than a month after the airport's

inauguration, when an aircraft struck a steppe eagle.⁵¹ This incident highlights a systemic failure to conduct rigorous, site-specific risk assessments and to integrate mitigation measures into project design from the outset.

These cases point to a broader, systemic weakness in Nepal's development process. EIAs are often treated as a procedural hurdle to be cleared—a "pro forma" compliance exercise—rather than a genuine tool for sustainable planning.⁴² As noted in analyses of the Nijgadh case, EIAs are frequently commissioned late in the project cycle, after key decisions on location and design have already been made. They often lack sufficient technical detail, fail to adequately analyze cumulative impacts, and propose mitigation measures (like compensatory afforestation on a massive, likely unachievable scale) that are not credible.⁴² This suggests a process susceptible to political influence, designed to justify pre-determined outcomes rather than to guide decision-making toward the most environmentally and socially responsible path.

5.2 Social Disruption: Land Acquisition, Displacement, and Livelihood Impacts

The social costs of airport development have been equally profound, creating deep-seated conflicts between the state and local communities. Large-scale land acquisition for these projects has consistently led to displacement, loss of livelihoods, and disputes over compensation.

The Nijgadh project threatens the most severe social disruption, with plans that would displace approximately 1,476 families, totaling nearly 8,000 people, from settlements such as Tangiya Basti.⁴⁰ The situation for these residents is particularly perilous, as many are long-term migrants from other regions who lack formal land ownership certificates. Under current government policy, this makes them ineligible for land-for-land compensation, leaving them vulnerable to eviction with little recourse and threatening their very survival.⁴⁵

This pattern of conflict is not unique to Nijgadh. The expansion of Gautam Buddha Airport in Bhairahawa directly impacted an estimated 2,295 people across 389 households, the majority of whom lost their agricultural land, which was their primary source of livelihood. The process was marked by significant local opposition, with farmers and residents staging protests and halting construction work to demand fair and timely compensation for their losses.⁷⁹ Similarly, the land acquisition process for Pokhara Airport was characterized by high-intensity conflict. Local communities organized blockades and clashed with police, refusing compensation offers they deemed inadequate and demanding that the government first provide essential infrastructure like roads and schools in their proposed relocation sites.⁸⁰ The project also

created economic uncertainty for established paragliding businesses whose operations were threatened by the new airport's flight paths.⁸⁰

Academic research into these conflicts, particularly in the context of Nijgadh, suggests that the issue transcends simple land disputes. It is a conflict over social justice and recognition.⁴¹ The development narrative often renders local communities, especially marginalized and non-land-owning groups, invisible. Their deep-rooted connection to the land and forest for subsistence and livelihood is misrecognized and undervalued in official cost-benefit analyses. The result is a classic case of distributive injustice, where the promised national benefits of development are unlikely to be shared by the very people who bear the most immediate and devastating costs of displacement and loss of livelihood.⁴⁶

The failure to properly manage these environmental and social risks should not be viewed as a mere procedural or ethical lapse; it represents a direct and material financial liability for the state. The legal challenges that halted the Nijgadh project, for instance, have indefinitely stranded the more than Rs. 2 billion in public funds already spent on preliminary works.³⁹ The social conflicts and protests at PIA and GBIA led to construction delays, which invariably increase project costs and postpone the start of revenue generation, thereby worsening the financial viability of these already-strained investments.⁷⁹ The operational hazard of bird strikes at PIA, a direct result of a flawed environmental assessment, creates an ongoing safety risk that could lead to a catastrophic accident, with immeasurable costs in human life and devastating consequences for the nation's tourism reputation.⁵¹ This demonstrates that environmental and social risks are not externalities to be managed after the fact. They are core components of project risk that directly translate into financial and operational failures. Treating the ESIA process as a critical, upfront risk management tool, rather than a retroactive compliance document, is therefore essential for the financial and operational success of any future infrastructure project.

Section 6: The Ecosystem of Influence: Mapping National and International Stakeholders

This section maps the key actors shaping Nepal's aviation and tourism sectors, analyzing their roles, influence, and interactions.

6.1 Government and National Bodies

The Government of Nepal's institutional framework for aviation and tourism is led by a triumvirate of key bodies, each with a distinct and sometimes overlapping mandate.

- **Ministry of Culture, Tourism & Civil Aviation (MoCTCA):** As the apex government body, MoCTCA is responsible for formulating national policies, developing strategic plans like the "Visit Nepal Decade," and providing overall direction for both sectors. It acts as the official proponent for major infrastructure projects, such as the Nijgadh airport, and is the primary publisher of official tourism statistics that form the basis of economic analysis.¹
- **Civil Aviation Authority of Nepal (CAAN):** CAAN is arguably the most powerful and controversial actor in the ecosystem. It is vested with the dual authority of being the sole regulator of the aviation industry—responsible for safety oversight, airworthiness standards, and licensing—while also acting as the primary service provider, managing and operating all of the country's airports.³⁶ This inherent conflict of interest has made it the focal point of international criticism and the target of major institutional reform efforts aimed at improving safety.²
- **Nepal Tourism Board (NTB):** Established as a public-private partnership, the NTB is the national tourism organization tasked with marketing and promoting Nepal as an attractive tourist destination on the global stage.⁸¹ It works in close collaboration with MoCTCA and private sector stakeholders to implement promotional campaigns and is a key implementing partner for the "Visit Nepal Decade" initiative.¹²

6.2 International Financial Institutions (IFIs) and Development Partners

Given Nepal's status as a low-income country, international partners play a crucial role in financing and shaping the development of its infrastructure and related sectors.

- **Asian Development Bank (ADB):** The ADB has been the most significant INGO partner in Nepal's aviation sector modernization. Its role extends beyond simple financing; it provides critical technical assistance and uses its financial leverage to push for governance reforms. The ADB has funded major capacity enhancement projects at TIA and the upgrade of GBIA, and its policy-based loan for the Civil Aviation Sector Improvement Program is explicitly designed to support the politically difficult but essential task of splitting CAAN.²
- **World Bank:** The World Bank's engagement has been more analytical and focused on the economic underpinnings of tourism. Its reports have provided vital, and often

critical, assessments of Nepal's tourism model, highlighting the trend towards low-value tourism and making the economic case for a strategic shift towards high-value, sustainable tourism, particularly in and around the country's protected areas.⁴ This provides an essential evidence base for policy reform.

- **United Nations Development Programme (UNDP):** The UNDP's work is linked to broader development goals. In the context of tourism, it has supported the construction of small-scale tourism infrastructure, such as trails and parks, as a means of providing short-term employment for vulnerable populations, especially post-pandemic.⁸³ Its broader work on promoting digital transformation and aligning development with the Sustainable Development Goals (SDGs) also intersects with the modernization of the tourism and infrastructure sectors.⁸⁴

6.3 Civil Society: NGOs and INGOs as Advocates and Implementers

Civil society organizations, both domestic and international, form a vibrant and influential part of the ecosystem, acting as implementers, advocates, and watchdogs.

- **Role and Regulation:** Nepal has seen a proliferation of Non-Governmental Organizations (NGOs) and International NGOs (INGOs) since the democratic transition in 1990.⁸⁷ All such organizations must register and operate under the legal framework of the Social Welfare Council (SWC), which coordinates and approves their projects, particularly those involving foreign funding.⁸⁷
- **Conservation and Eco-tourism NGOs:** Leading INGOs like the World Wildlife Fund (WWF) and national trusts like the National Trust for Nature Conservation (KMTNC) are pivotal in the field of conservation. Their work often involves creating and managing community-based eco-tourism projects, such as homestays in the Madi Valley or along the Khata Corridor.⁹¹ These initiatives are designed to create alternative, sustainable livelihoods for local communities that are directly linked to the preservation of biodiversity, thereby creating a powerful local constituency for conservation.⁹³
- **Advocacy and Watchdog Role:** A crucial function of civil society is to act as a check on government power. Local activists, environmental lawyers, and international advocacy groups (often cited in media like Mongabay and platforms like the Environmental Justice Atlas) have been instrumental in bringing the severe negative impacts of airport projects to public attention. Through research, public protests, media campaigns, and legal action, they have successfully challenged government narratives and forced

accountability. Their advocacy was a key factor in the Supreme Court's decision to halt the Nijgadh airport project.⁴²

- **Private Sector Associations:** Industry bodies such as the Trekking Agencies Association of Nepal (TAAN), the Hotel Association of Nepal (HAN), and the Nepal Association of Rafting Agents (NARA) represent the collective interests of the private sector. They advocate for favorable government policies while also playing a role in promoting professional standards and responsible tourism practices among their members.⁹¹

The development trajectory of Nepal's aviation and tourism sectors is not a linear, state-led process. Rather, it is the outcome of a dynamic and often contentious interplay between three distinct centers of influence. The first is the state apparatus (MoCTCA, CAAN), driven by visions of national prestige and top-down economic growth, often manifesting in large-scale, politically symbolic infrastructure projects. This group's approach can be supply-driven and sometimes overlooks complex on-the-ground realities. The second force is the international financial institutions (ADB, World Bank), whose influence stems from their control over capital. They act as a force for technocratic rationalization, pushing for projects that are economically justifiable and tying funding to crucial governance reforms and adherence to international safeguards. The third is civil society, including environmental and social NGOs, whose power lies in advocacy, public mobilization, and legal challenges. They serve as a vital counterweight, forcing the environmental and social costs of development into the public and legal arenas and demanding accountability. The outcome of any major project—from the stalling of Nijgadh to the underperformance of PIA and the slow reform of CAAN—is a direct reflection of the shifting balance of power and leverage among these three competing forces.

Section 7: Conclusion and Strategic Recommendations

This final section synthesizes the report's findings into a coherent conclusion and provides a set of prioritized, actionable recommendations for policymakers.

7.1 Synthesizing the Core Challenge: A Systemic Disconnect

The comprehensive analysis presented in this report reveals a profound and systemic disconnect at the heart of Nepal's national development strategy. The country has pursued an ambitious, infrastructure-led vision for tourism growth, investing hundreds of millions of dollars

in new and upgraded airports. This strategy, however, has been executed with a critical lack of integration, leading to a dangerous misalignment with the complex realities of regional geopolitics, aviation safety standards, financial sustainability, and socio-environmental responsibility. The core challenge is that Nepal has focused on building the "hardware" of development—runways, terminals, and roads—without concurrently developing the essential "software" of diplomacy, regulatory integrity, and sustainable planning required to make that hardware functional and productive.

The result is a portfolio of high-cost, underperforming assets that risk becoming significant liabilities for the state. The new international airports at Pokhara and Bhairahawa, intended as catalysts for a new era of decentralized tourism, are instead symbols of unrealized potential, hamstrung by unresolved airspace issues and a resulting lack of commercial viability. The persistent failure to reform the nation's aviation safety framework, centered on the institutional conflict within CAAN, continues to undermine international confidence and actively blocks access to key tourism markets. Finally, the pursuit of mega-projects like the Nijgadh airport has demonstrated a willingness to overlook catastrophic environmental and social costs in the name of a development vision that is both speculative and contentious. Building airports is not, in itself, a strategy. Without a holistic approach that integrates these other critical factors, Nepal's aviation investments will fail to deliver their promised economic returns, and the "Visit Nepal Decade" will remain an ambition rather than an achievement.

7.2 A Forward-Looking Agenda: Strategic Recommendations for Sustainable Growth

To bridge this disconnect and set the aviation and tourism sectors on a path to sustainable prosperity, a strategic pivot is urgently required. The following five recommendations are presented as a prioritized, actionable agenda for policymakers.

- **Recommendation 1: Pivot from an Infrastructure-Led to a Diplomacy-Led Aviation Strategy.**
 - **Action:** The Government of Nepal must immediately elevate the resolution of airspace agreements with India to the highest level of diplomatic priority, engaging in sustained, strategic, and cabinet-level negotiations. Critically, all future large-scale airport investment decisions must be made contingent upon the pre-existence of legally binding, operational bilateral agreements for the necessary air routes.
 - **Rationale:** The current paralysis of PIA and GBIA demonstrates unequivocally that the utility of billions of rupees in infrastructure is determined not by its technical

specifications but by the political agreements that govern its use. Investing in hardware before securing the software is a recipe for strategic failure, as it cedes all negotiating leverage to external actors after the financial commitment has been made.

- **Recommendation 2: Execute the Bifurcation of CAAN as a National Economic Priority.**

- **Action:** The cabinet must fast-track the passage of the Civil Aviation Authority of Nepal Bill and the Air Service Authority of Nepal Bill through parliament. This reform must be framed and championed not as a niche technical issue for the aviation sector, but as a critical economic enabler for the entire nation. Its passage is the key to lifting the EU air safety ban, restoring international confidence, and unlocking the full potential of the "Visit Nepal Decade."
- **Rationale:** This single legislative action addresses the root cause of Nepal's systemic safety issues and is the most significant non-financial barrier to accessing high-value tourism markets. The cost of continued political gridlock on this issue is directly measurable in lost tourism revenue and diminished international standing.

- **Recommendation 3: Mandate a "Viability First" Approach for New Infrastructure.**

- **Action:** An official moratorium should be placed on the Nijgadh International Airport project. Planning and financial resources should be immediately reallocated to the development of a comprehensive National Aviation System Plan. This plan's primary objective should be to maximize the operational and financial viability of existing assets (TIA, PIA, GBIA) through targeted investment, marketing, and diplomatic efforts. Any future greenfield airport project must be required to pass a rigorous and independent feasibility study that demonstrates its financial and operational viability *without* relying on speculative or overly optimistic growth projections.
- **Rationale:** The current national airport portfolio is already plagued by underutilization. Committing further capital to another massive, costly, and environmentally destructive project before making existing assets viable is fiscally irresponsible and strategically unsound.

- **Recommendation 4: Integrate Environmental and Social Risk into Financial Planning.**

- **Action:** The Environmental and Social Impact Assessment (ESIA) process must be fundamentally reformed. It must be transformed from a subsequent compliance check into an upfront, independent, and binding component of project feasibility and selection. All major infrastructure project budgets must be legally required to include fully-funded, ring-fenced, and legally enforceable line items for all identified costs of

compensation, community resettlement, and long-term environmental mitigation (such as compensatory afforestation and biodiversity management).

- **Rationale:** As the cases of Nijgadh, Pokhara, and Bhairahawa have shown, unaddressed or poorly managed social and environmental issues are not externalities; they are direct and material causes of project delays, massive cost overruns, legal failure, and long-term operational hazards. Recognizing these factors as core financial risks is essential for sound public investment.
- **Recommendation 5: Re-align Tourism Strategy from "Volume" to "Value".**
 - **Action:** The framework for the "Visit Nepal Decade" should be revised to shift its primary focus from quantitative arrival targets to qualitative value creation. This requires developing and funding specific strategies aimed at attracting higher-yield tourism segments, as recommended in World Bank analyses. Key actions should include targeted marketing for niche products (e.g., high-end wellness and spiritual tourism, specialized adventure sports, curated cultural immersion), investing in skills development and certification for the tourism workforce to improve service quality, and creating incentives for sustainable and eco-certified tourism operators.
 - **Rationale:** The current trajectory towards low-value, high-volume mass tourism is both economically and environmentally unsustainable. Achieving the nation's ambitious GDP contribution goals requires attracting visitors who spend more, stay longer, and engage more deeply with local economies, thereby maximizing economic benefit while minimizing the ecological footprint on the very assets that make Nepal a unique destination.

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