

# WHITE PAPER BETWEEN RHETORIC AND REALITY: UNMASKING THE MYTHS



جو ہوتا ہے وہ دکھتا نہیں، جو دکھتا ہے وہ ہوتا نہیں

### Editor's Note

Dear Readers,

We are pleased to present the latest publication from the Policy Wire research team: the white paper titled "**Between Rhetoric and Reality: Unmasking the Myths**". This document represents a meticulous compilation of open-source data, drawn from official budgets, census reports, development bank disclosures, academic analyses, and other publicly accessible records. Over several months, our team has synthesized this information to provide a fact-based examination of key issues in Pakistan's regional development, security, governance, and economic landscape.

The white paper is structured across ten sections, beginning with a profile of Balochistan and extending to Khyber Pakhtunkhwa, Azad Jammu and Kashmir, and Gilgit-Baltistan, addressing political representation, budgetary mechanisms, and local challenges. Subsequent sections cover counter-terrorism strategies, international relations, perceptions surrounding the Pakistan Army, information technology concerns, social policy frameworks, and broader economic topics, including resource management and water security.

We aim to bridge the gap between prevailing narratives and empirical evidence, fostering informed discourse in an era of widespread misinformation. Verifiable sources support every claim, and we encourage readers to engage critically with the material.

We invite your feedback and look forward to continued dialogue on these vital topics.

The Policy Wire Editorial Team

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POLICY WIRE

## REALITY OF BALOCHISTAN

### 1. Balochistan Profile

- a. **Population.** As per Census 2023, the **population of Balochistan stands at 14.89 million**.<sup>1</sup> The province has shown the highest average population growth rate (3.2% annually) since 2017 census. Balochistan comprises **6.2% of Pakistan's total population**, characterized by its multi-ethnic makeup, predominantly include **Balochis, Pashtuns, Brahvis, Hazaras, Sindhis, Punjabis, Uzbeks, and Turkmens**.

Ethnicity*				
Balochi	Pashto	Brahvi	Sindhi	Others
40%	34%	17%	4%	5%
*Census 2023 <sup>2</sup>				

- b. **Geographic Area.** Balochistan is located at the south-eastern edge of the Iranian plateau. It strategically bridges the Middle East and Southwest Asia to Central Asia and South Asia, and forms the closest oceanic frontage for the land-locked countries of Central Asia. The province shares borders with Iran and Afghanistan in the West and northwest respectively and with the provinces of KP in northeast, Punjab in east, Sindh in southeast, and by the Arabian Sea on South. It is the largest of the four provinces of Pakistan, **spreads over an area of 347,190 sq km, forming 43.6% of the total area of Pakistan**.<sup>3</sup>

### 2. Political Representation of Balochistan

National Assembly						
Punjab	KP	Sindh	Balochistan	Federal Capital	Reserved (Non-Muslims)	Total
173	55	75	20	3	10	336
Provincial Assemblies						
Balochistan		KP		Punjab	Sindh	
65		145		371	168	
Senate						
Balochistan Seats				Total Seats		
23				96		

<sup>1</sup> <https://gallup.com.pk/wp/wp-content/uploads/2023/10/Gallup-Pakistan-analysis-of-Census-2023-Results-8.pdf>

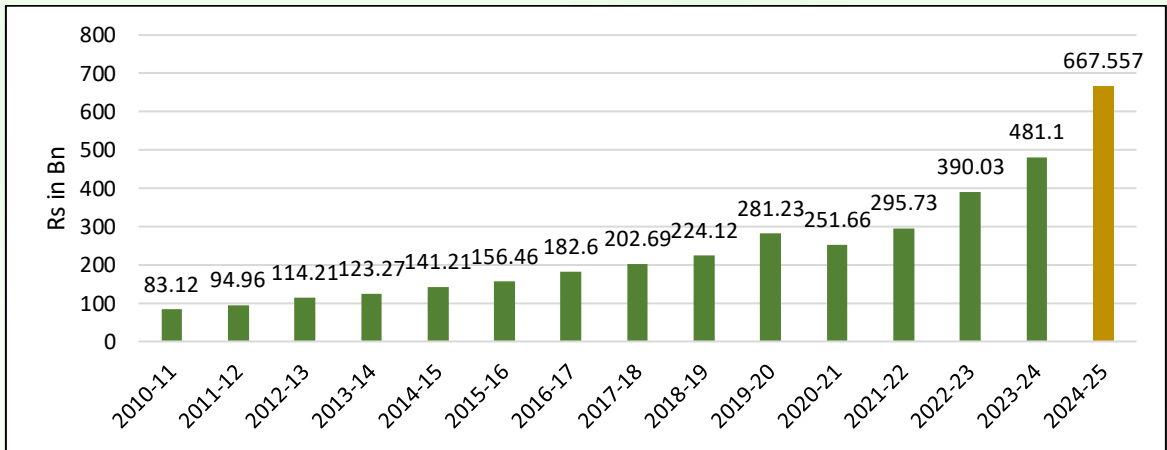
<sup>2</sup> <https://gallup.com.pk/wp/wp-content/uploads/2024/08/PR-1-Mother-Tongue-Census-2023-1.pdf>

<sup>3</sup> <https://www.pakistanembassy.gr/balochistan>

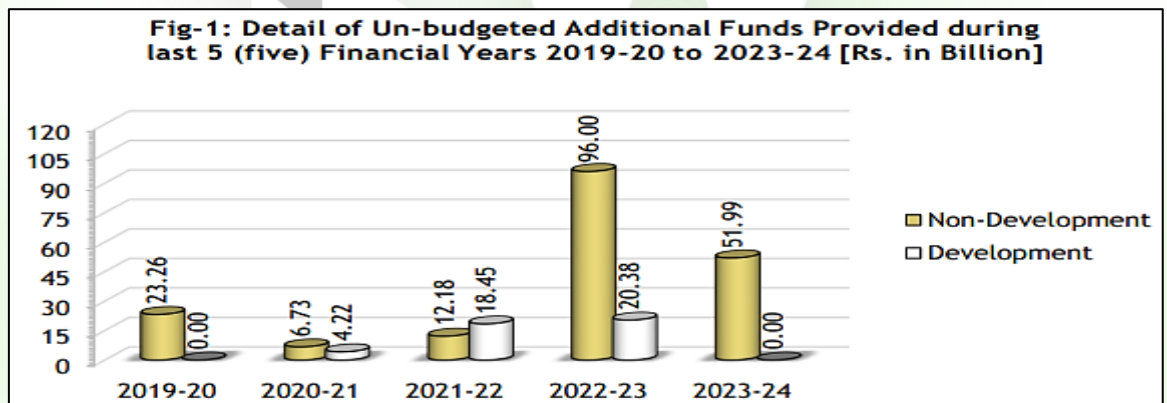
3. **Balochistan’s Budgetary Demands, Royalties and Federal Support**

a. **NFC**

- 1) Balochistan’s share in NFC awards has increased over the years (Figure:1).
- 2) **2023/ 24 - 533 bn** (481 bn under NFC, 52 bn additional funds) (Figure:2)
- 3) **2024/ 25 - Rs. 667.557 bn.**<sup>4</sup>
- 4) **2025/ 26 - Rs. 713.621 bn** (Aloc under NFC).<sup>5</sup>



**Figure:1 – Balochistan Share in NFC Awards Over the Years**

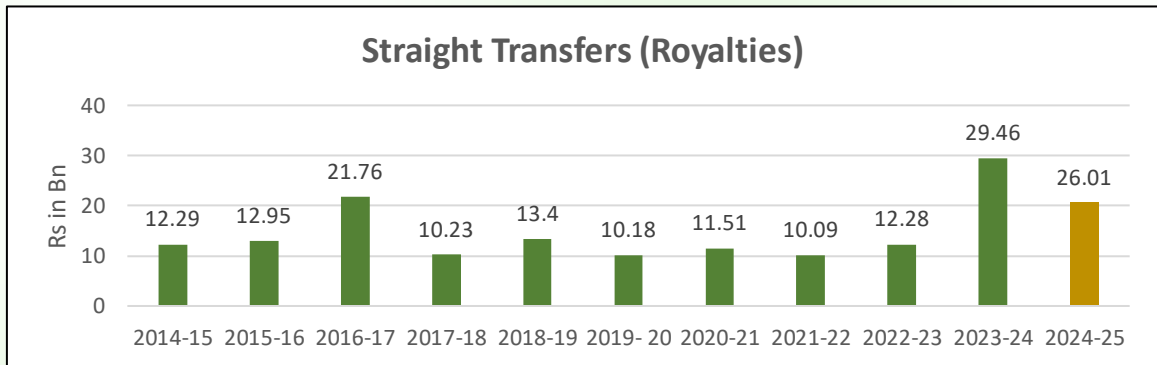


**Figure:2 – Details of Un-budgeted Additional Funds (Last 5 Yrs)**

<sup>4</sup> <https://www.nation.com.pk/13-Jun-2024/provinces-to-get-rs7-438tr-under-nfc-award>

<sup>5</sup> Budget white paper

- b. **Straight Transfers (Royalties).** 2025/ 26 - Rs. 29.5 bn (Figure:3)



**Figure:3 – Straight Transfer (Royalties)**

- c. **PSDP.** An amount of **Rs. 249.5 bn** has been allocated for the **Public Sector Development Program (PDSP) for FY 2025-26.**<sup>6</sup>
- d. **Foreign Funded Projects.** Foreign funded projects in Balochistan are being implemented in various sectors such as Irrigation, Agriculture, Livestock, Forest, Watershed Management and others. Such funding is received through grants and loans from various donor agencies. In some cases, Government of Balochistan shares the cost as a counterpart funding.
- 1) **In 2024-25 the quantum of foreign funded projects remained at Rs. 23.3 bn.**<sup>7</sup>
  - 2) For **FY 2025-26, the quantum of Foreign Project Assistance is estimated at Rs. 30.1 bn.**<sup>8</sup> List of some of the foreign funded projects (loan and grant financing) in Balochistan for 2024-2025 are projects at

**Figure: 4.**

FPA Loans estimated for FY 2024-25			
Description	B.E 2023-24	R.E 2023-24	B.E 2024-25
Balochistan Water Resources development sector project (BWRDS)- ADB 3700 Pak	7,250.00	4,575.60	6,975.00
Balochistan Integrated Water Resources Mgmt & Development – IDA 5885 Pak	3,000.00	4,291.02	2,332.44
Balochistan Human Capital & Investment Project (BHCIP)	1,740.00	2,095.29	1,735.38
Gwadar Lasbela Livelihood Support Project -2 IDA 2000003417 Pak	2,862.30	279.00	63.05

<sup>6</sup> <https://www.finance.gob.pk/wp-content/uploads/2025/07/WHITE-PAPER-2025-26.pdf>.

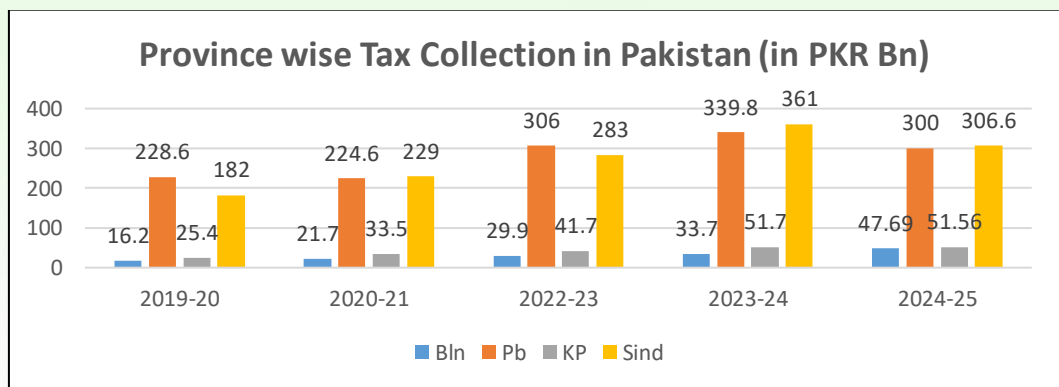
<sup>7</sup> Ibid.

<sup>8</sup> Ibid.

Balochistan Flood Emergency Assistance	4,350.00	3,627.00	4,185.00
Balochistan Livelihood and Entrepreneurship Project	5,291.00	2,059.02	1,534.50
Emergency Flood Assistance Balochistan (Agriculture component)	-	1,032.02	1,116.00
Total Receipts (FPA Loan)	25,124.10	17,958.95	17,941.37

**Figure:4 – Foreign Funded Projects**

- e. **Taxes.**<sup>9</sup> Balochistan **exhibits the lowest tax collection** amongst the provinces of Pakistan. For **FY 2024-25, Balochistan collected Rs. 47.69 bn in tax**, while KP recorded Rs. 51.56 bn in tax collection, Punjab recorded Rs. 300 bn and Sindh topped the chart with Rs. 306.6 bn (**Figure:5**).



**Figure:5 – Tax Collection Province wise**

- f. **Corporate Social Responsibility (CSR) Contributions.** PNIs in Balochistan contributed approximately Rs 12.02 bn in CSR activities (**Figure:6**). Other contributions include: -

- 1) 49 x Schools benefiting approximately 12,000 students
- 2) 520 Scholarships & 3,405 x skilled workers training

Education Sector (1947 VS 2024)						
	Schools	Universities	Medical Colleges	Colleges	Cadet College	Technical Institute
At independence time	114	-	-	-	-	-
Today	15,096	12	5	145	13	321

**Figure:7– Education Sector (1947 Vs 2024)**

<sup>9</sup> <https://www.finance.gob.pk/wp-content/uploads/2023/07/White-Paper-2023-24-FINAL.pdf>  
[https://www.finance.gob.pk/wp-content/uploads/2021/06/WHITE-PAPER-2021-22-Layout-R-3-LR\\_compressed.pdf](https://www.finance.gob.pk/wp-content/uploads/2021/06/WHITE-PAPER-2021-22-Layout-R-3-LR_compressed.pdf)  
<https://pnd.punjab.gov.pk/system/files/WP24-25.pdf>  
<https://pnd.punjab.gov.pk/system/files/WhitePaper202122.pdf>  
<https://www.pakp.gov.pk/wp-content/uploads/2024/05/c.-White-Paper-2023-24.pdf>  
<https://www.pakp.gov.pk/wp-content/uploads/2024/05/ca-White-Paper-2024-25.pdf>  
<https://finance.gos.pk/Receipts/ProvincialTax>

- 3) 35 x Med Facilities (Dispensaries, BHU & Hospitals) providing treatment to approximately 49,000 patients/ year
- 4) 48 x Water Supply Schemes/ Filtration plants, providing drinking water to approximately 35,000-40,000 people
- 5) 8 x Roads (26.5 Kms) - Hub, Sakran, Duraji & Dera Murad Jamali

Sector	Minerals Coal	Copper/ Gold	Oil / Gas	Power	Industry	Total
HR Emp- Local	49,436	2,270	2,944	739	2,250	57,639(81%)
CSR	Rs 0.103 Bn	Rs 2.9 Bn	Rs 4.79 Bn	Rs 0.99 Bn	Rs 4.24 Bn	Rs 12.02 Bn
<u>Overview</u> <ol style="list-style-type: none"> <li>a. All agreements are approved by GoB</li> <li>b. Present distribution of profit (Royalty - 50%, Investor - 25% GoB &amp; 25% GOP)</li> <li>c. PNIs contribute 70% in provision of revenue (Rs 120 Bn out of Rs 181 Bn)</li> <li>d. 80% Labour at projects from local community (Approx 58000 locals)</li> </ol>						

**Figure:6 – CSR Contributions**

- g. **Employment in Indigenous Projects.** Balochistan's estimated **\$1 trillion worth of natural resources** supports mineral industries that employ around **57,000 people, 80% of whom are Baloch.**<sup>10</sup>

#### 4. **Socio-economic Development of Balochistan**

- a. **Education Sector.** At the time of Pakistan's independence, Balochistan had only **114 schools**. Today, the province boasts **12 universities, 5 medical colleges, 145 colleges, 13 cadet colleges, 15,096 schools, and 321 technical institutes (Figure:7)**. As part of its initiative to expand access to quality education and to minimize the number of out-of-school children, **Balochistan government has awarded scholarships to 75,000 students for 2024.**<sup>11</sup> The province has illustrated a commendable increase in **literacy rate, which has risen from 5.5% at the time of independence to 54.5% in 2024.**<sup>12</sup> **Balochistan Education Endowment Fund (BEEF)** is another government initiative to provide scholarships to **8,000 x school and college-level students**

<sup>10</sup> <https://www.mei.edu/publications/balochistan-periphery-center-attention>

<sup>11</sup> <https://8171ehsasprograme.pk/75000-scholarships-announced-by-balochistan-government/>

<sup>12</sup> <https://www.ptv.com.pk/ptvWorld/engNewsDetail/57580#:~:text=Literacy%20rate%20in%20Balochistan%20has,through%20Facebook%2C%20Twitter%20and%20YouTube.>

of Balochistan. The project, additionally, collaborates with foreign universities to offer Baloch youth higher education opportunities abroad<sup>13</sup>.

- b. **Health Sector.** During Pakistan's independence, Balochistan had only **3 x hospitals and 6 x dispensaries**. The number has expanded to **13 x major hospitals, 18 x teaching hospitals, 33 x district headquarters (DHQ) hospitals, 756 basic health units (BHUs), 541 dispensaries, and 4 cardiac centers**. Additionally, **8 x tuberculosis (TB) centers and 24 x dialysis centers** have been established, reflecting the significant strides in healthcare infrastructure (**Figure:8**).<sup>14</sup>

HEALTH SECTOR BLN 1947 VS 2024		
	At independence time	Today
Major Hospitals	3	13
Teaching Hospitals	-	18
DHQs	-	33
BHUs	-	756
Dispensaries	6	541
Cardiac Centers	-	4
Tb Centers	-	8
Dialysis Centers	-	24

**Figure:8– Health Sector (1947 Vs 2024)**

- c. **Power Project.** It is a **\$2 bn, 1,320MW coal-fired power plant set up by the China Power Hub Generation Company (CPHGC) under the China-Pakistan Economic Corridor (CPEC)**<sup>15</sup>. Hub Coal Power Project has **not only created nearly 10,000 jobs in Balochistan** during its construction but also continued to carry out desert tree planting and coastal cleaning activities for many years, and helped build a fishing pier and a public welfare school.<sup>16</sup>
- d. **Saindak Copper Gold Project.** The Saindak project is a major mining operation in Balochistan, located near the Reko Diq site in the Chagai district. Initially developed by the Metallurgical Corporation of China (MCC), the

<sup>13</sup> <https://beef.org.pk/events/good-intentions-or-good-results/>

<sup>14</sup> <https://www.samaa.tv/2087312141-progress-in-health-facilities-marks-balochistan-s-transformation>

<sup>15</sup> <https://www.dawn.com/news/1500348>

<sup>16</sup> <https://www.pakistantoday.com.pk/2024/09/25/china-pakistan-economic-corridor-benefits-people-of-balochistan/>

Saindak project has been operational since the early 2000s.<sup>17</sup> Key statistics and details include: -

- 1) **Production Capacity**. The Saindak project has an **annual production capacity of 15,800 tons of blister copper, 1.47 tons of gold, and 2.76 tons of silver**.<sup>18</sup>
  - 2) **Economic Value**. The project **generates an estimated \$60 mn annually in revenue, with 50% of the profits going to MCC and 50% shared between federal and provincial governments**.
  - 3) **Social Work**. The Saindak Copper Gold Project **built the only high school in the area, Saindak High School, providing free education to more than 600 students, and its project hospital serves over 4,000 villagers**.
- e. **Reko Diq Project**. Reko Diq, located in Balochistan's Chagai district, is one of the world's largest copper-gold projects. If fully developed, this project holds the potential to transform Balochistan's economy, generating substantial government revenue and creating thousands of jobs. Key statistics of the project include: -
- 1) **Reserves**. Reko Diq is one of the world's largest undeveloped copper and gold reserves, with the **potential to produce 200,000 tons of copper and 250,000 ounces of gold annually for over half a century**.<sup>19</sup>
  - 2) **Economic Value**. The total **resource value is estimated at around \$3 trillion**, making it one of the most significant mining projects in the world.
  - 3) **Project Investment**. In 2023, the government of Pakistan signed an agreement with Barrick Gold Corporation, committing an investment of **\$10 bn over the next decade**.<sup>20</sup>
  - 4) **Revenue Share**. **Barrick Gold owns a 50% stake in Pakistan's Reko Diq mine, with the remaining 50% owned by the Federal**

<sup>17</sup> <https://www.paradigmshift.com.pk/pakistan-mines/>

<sup>18</sup> <https://loksujag.com/story/The-curious-case-of-the-Sanjranis-Saindak-mine-project>

<sup>19</sup> <https://www.indiatoday.in/business/story/can-reko-diq-gold-end-pakistan-economic-crisis-saudi-arabia-makes-bid-stake-2592664-2024-09-03>

<sup>20</sup> <https://www.sifc.gov.pk/news/150>

**Government of Pakistan and the Provincial Government of Balochistan.**

- 5) **Job creation.** The project is **expected to generate 10,000 x jobs at its peak.**<sup>21</sup>
- f. **Duddar Lead-Zinc Mine Project.** The Duddar lead-zinc mine, also located in Balochistan, is another significant mineral resource under development. Key statistics and details include: -
- 1) **Reserves.** The ore reserves at the Duddar mine have been estimated at **50 mn tonnes with ore grading of 3.2% for lead and 8.6% for zinc.**<sup>22</sup>
  - 2) **Production Capacity.** The annual **production capacity of Duddar mines stand at 500,000 tons<sup>23</sup> of lead and 300,000 tons of Zinc** concentrates.
  - 3) **Job creation.** **70% percent of the employees in the Duddar project are from Balochistan, of which 75% are locals from the Lasbela District.**<sup>24</sup>
  - 4) **Social Work.** Since its operationalization, the Duddar Lead-Zinc mine project has newly **built and renovated six surrounding primary and secondary school buildings and regularly assisted about 300 x students<sup>25</sup>** in surrounding community schools with education and living supplies.
- g. **Gwadar Development Authority (GDA).** The GDA is responsible for overseeing and coordinating development activities in Gwadar. The authority has undertaken multiple infrastructure projects, such as: -
- 1) **Gwadar International Airport.** This airport, still under construction, is expected to be the largest in Pakistan and will serve as a major link between Pakistan and international trade routes.
  - 2) **Water and Energy Projects.** The GDA has initiated projects to improve water supply and energy access in Gwadar, aiming to build desalination

<sup>21</sup> <https://www.sifc.gov.pk/news/150>

<sup>22</sup> <https://thechinaproject.com/2023/03/16/inside-chinas-lead-and-zinc-mine-in-balochistan-pakistan/>

<sup>23</sup> <https://www.dawn.com/news/1529427>

<sup>24</sup> <https://thechinaproject.com/2023/03/16/inside-chinas-lead-and-zinc-mine-in-balochistan-pakistan/>

<sup>25</sup> <https://www.pakistantoday.com.pk/2024/09/25/china-pakistan-economic-corridor-benefits-people-of-balochistan/>

plants and solar power stations to meet the local needs of both residential and industrial sectors<sup>26</sup>.

- 3) **Water Projects**. To address the water needs of population in Balochistan, **4 x Dam projects have been proposed for construction, namely Burg Aziz Dam, Babar Kach Dam, Halak Dam and Mangi Dam. Mangi Dam is currently under construction and is 80% complete.**

h. **Urban Poverty Alleviation Program (UPAP) through UAE Assistance**

1) **UPAP III Completed Projects**

- a) **SMBZAN ICQ (Shiekh Muhamamd Bin Zayed Al-Nahyan Institute of Cardiology Quetta) (USD 27.2 Mn)** is 1<sup>st</sup> of its kind facility in Balochistan, inaugurated in **November 2022. The facility has: -**

- i) **120 x Bedded hospitals** with diagnostics, surgery, angiography, angioplasty facilities.
- ii) **552 x staff** working; so far **98162 patients** treated including **169 x cardiac surgeries**.
- iii) Treatment through **BHCP (Balochistan Health Card Program) & STP (Sehat Tahafuz Program)**.
- iv) **Peads Cardiologist and Dialysis facilities; future undertaking including Cancer treatment.**

- b) **Date Processing Plant Panjgur (USD 6.36 Mn)**. Projects construction in Panjgur; op in August 2021 benefitting local farmers - **800 x tons processed in 2022, 700 x tons processed in 2023 and 750 x tons in 2024**. Socio-economic dividends of the project include: -

- i) **Provision of jobs to 145 x locals.**
- ii) **Financial benefit; Dates procurement rate increased from 250/ kg to 450/ kg.**
- iii) **Post fencing, locals engaged in smuggling shifted livelihood to agriculture sector.**

<sup>26</sup> <https://gda.gov.pk/projects/>

- iv) **Date production increase by 142,242 Ton in 3 years (90 Acres land added).**
  - a) **GCCT (USD 11.5 Mn) – 1<sup>st</sup> cadet college** for girls in Balochistan, functional since **Mar 22**.
  - b) **4 x DHQs Renovation (USD 8.04 Mn)** - Aawaran, Panjgur, Zhob and Chaman Distt.
- 2) **UPAP IV Planned Projects**
  - a) **31 x Projects were identified** for inclusion in UPAP after deliberate consultation with civ departments with total cost of Rs **388.7 bn**.
  - b) **5 x projects (4 x Health & 1 x Education Sector)** granted preliminary approval by UPAP Authorities (Including Construction/upgradation of DHQ at Musa Khel, Gwadar and Kharan).
  - c) **25 x Scholarships to High School Graduates of Balochistan in UAE Universities.**
- i. **Road Networks in Balochistan.** In 1947, Balochistan had only 375 kms road infrastructure development. Balochistan now boasts a vast road infrastructure, comprising **25000 kms**. Balochistan is also a host to the greatest number of national highways within the country, with **8 x highways (Figure:9)**. Punjab and Sindh host 3 highways each in contrast. i.e. Balochistan 8, Sindh 3, Punjab 3.

MAJOR RDS IN BLN
N-10 (Makran Coastal Highway)
N-25 (Karachi-Bela-Khuzdar-Kalat-Quetta-Chaman)
N-30 (Basima-Khuzdar)
N-40 (Lakpass, near Quetta-Dalbandin-Taftan)
N-50 (D I Khan-Zhob-Kuchlak near Quetta)
N-85 (Hoshab-Panjgur-Nag Basima-Surab)
Motorway M-8 (Gwadar-Hoshab-Khuzdar-Ratodero)
N-65 (Sukkur-Sibi-Saryab, Quetta)

**Figure:9– Major Roads in Balochistan**

- j. **Joint Border Sustenance Markets (JBSMs)**. To facilitate cross-border trade, **12 x border markets have been planned, 6 of them along Pak-Iran border and 6 along Pak-Afghan border**. Phase wise opening of border markets is illustrated at **Figure:10**.

Phases	PAK-IRAN BORDER			
	Location	District	Near By Villages	Population
I	Mand	Kech	4	7096
	Gabd	Gwadar	7	6492
	Chedgi	Panjgur	11	1500
II	Katagar	Washuk	12	2500
	Jeerak	Panjgur	17	3100
	Jalgai	Kech	15	3500

**Figure:10 – JBSMs**

- k. **Social Safety Nets**. The federal government has extended its social safety programs, such as Benazir Income Support Programme (BISP) and Ehsaas Program, to Balochistan. These programs aim to reduce poverty by providing direct financial support to low-income families, along with access to healthcare and education.

5. **Contrary to claims of underrepresentation**, Balochistan follows the same political system as the rest of Pakistan, with significant political participation from Balochistan's political parties and leaders holding important positions in the federal government, including the Prime Minister, Senate Chairman, and Chief Justice of Pakistan. In fact, there have been **17 x Chief Ministers (CMs) of Balochistan** so far, all of which have been Baloch, despite the fact that ~30% of residents of Balochistan are Pashtuns. The list of these Baloch CMs is as under: -

- a. Ataullah Mengal (1972–1973)
- b. Jam Ghulam Qadir Khan (1973–1974)
- c. Mohammad Khan Barozai (1974–1977)
- d. Jam Ghulam Qadir Khan (1985–1988)
- e. Mir Zafarullah Khan Jamali (1988)
- f. Khuda Bakhsh Marri (1988–1989)
- g. Nawab Akbar Khan Bugti (1989–1990)
- h. Taj Muhammad Jamali (1990–1993)

- i. Zulfikar Ali Magsi (1993–1996)
- j. Mir Zafarullah Khan Jamali (1996–1997)
- k. Akhtar Mengal (1997–1998)
- l. Mir Jan Mohammad Jamali (1998–1999)
- m. Jam Mohammad Yousaf (2002–2007)
- n. Mohammad Saleh Bhutani (2007–2008)
- o. Nawab Aslam Raisani (2008–2013)
- p. Nawab Ghous Bakhsh Barozai (2013)
- q. Dr. Abdul Malik Baloch (2013–2015)
- r. Sanaullah Khan Zehri (2015–2018)
- s. Mir Abdul Quddus Bizenjo (2018, 2021–2023)

## 6. Missing Persons Issue

- a. The issue of **missing persons is not unique to Pakistan**. Global statistics show similar cases, some of which have been highlighted below: -
  - 1) 600,000 people go missing in US annually.
  - 2) In India 64851 people go missing monthly.
  - 3) In UK 1 x person is reported missing every second.
- b. The Commission of Inquiry on Enforced Disappearance, operational since 2011, has reviewed **10,636 missing person cases, with 8,986 resolved and 1650 still under investigation**, showcasing the state's commitment to transparency and accountability.
- c. Between 2005-**2022, Chippa and Edhi recovered 35980** unclaimed dead bodies, the provincial breakdown of which is as follows: -
  - 1) **AJ&K/GB**. 189
  - 2) **Balochistan**. 58
  - 3) **KP**. 1029
  - 4) **Punjab**. 6994
  - 5) **Sind**. 27410
- b. Currently 28000 x Pakistanis are confined in foreign jails (MOFA).
- c. **Missing Persons in Balochistan**
  - 1) Cases Received - 2895
  - 2) Cases Resolved - 2708 (93%)
  - 3) Returned Home - 2164
  - 4) Declared Interned - 2

5)	Confined in jails	-	30
6)	Dead bodies Recovered-		48
7)	Balance	-	187

- b. The issue of missing persons is often manipulated by terrorist organizations and criminal mafias who rely on proxies to further their illicit agendas and destabilize the state.
- c. Evidence also suggests that terrorists responsible for attacks on the state are often falsely depicted as missing persons, a tactic highlighted in the March 2024 Gwadar attack, where two terrorists involved were found on the "missing persons" list.

## 2. Myth of Deprivation in Balochistan

- a. Balochistan's vast expanse, **encompassing 44% of Pakistan's landmass yet inhabited by only 6% of its population (55.7% of them Baloch)**, poses inherent challenges to equitable development. Despite these challenges, notable progress has been made since 1947 for sustained socio-economic advancement in the province (for details refer to page 1).
- b. Balochistan, with its vast natural resources and strategic position, holds immense potential for economic development and progress. However, persistent security issues, aggravated by groups like the BLA, BRA, and foreign-supported terrorists, have stunted the region's growth.
- c. These factions, under the guise of defending local rights, actively sabotage development projects, disrupt essential infrastructure, and foster a climate of fear, ultimately harming the very communities they claim to protect.
- d. While these groups feign advocacy for the marginalized, yet they deliberately sustain deprivation by targeting development initiatives to preserve a sense of grievance that can be politically exploited. For instance, between 2005 and 2023, the BLA carried out 254 attacks on gas pipelines alone, even as it laments the lack of gas provision in the province.<sup>27</sup> In the year 2024, 546 x instances of property damage were reported due to terrorism activities by all TGBs.<sup>28</sup> The group has also repeatedly targeted CPEC, a cornerstone initiative for

<sup>27</sup> <https://www.eurasiareview.com/31102023-pakistan-exploding-pipelines-of-exploitation-in-baluchistan-analysis/>

<sup>28</sup> <https://www.satp.org/terrorism-update/baloch-insurgent-groups-collectively-carried-out-938-attacks-resulting-in-over-1002-deaths-in-2024>

mainstreaming Balochistan and fostering its economic integration with the rest of the country.

- e. The resulting climate of insecurity created by their acts of terrorism deters investment, impedes socio-economic progress and perpetuates deprivation, thereby undermining state-led initiatives aimed at empowering the Baloch people.



## REALITY IN KP

1. **Context.** A federation, much like a human body, relies on the harmonious function of its various organs. Each province, like an organ, contributes to the overall well-being of the federation. Just as a body cannot function effectively if one organ fails, a country falters when its provinces work in isolation or conflict.
2. **Flaws in PTM Proposal.** Nurturing on the breeding grounds in KP, some individuals from proscribed organization as **PTM with hidden agendas have recently propagated the misleading notion that KP is self-sufficient and that other provinces are exploiting its resources.** In addition, it has been alleged that the **military's extended presence in KP is motivated by the desire to exploit the region's resources and that it should leave the KP region.** Such ridiculous claims suggest that resource extraction, rather than security and stabilization, is the primary reason for its continued presence in KP. This divisive claim distorts reality and threatens the unity of Pakistan.
3. **Real Issue.** In the newly merged areas of KP, the comprehensive counter-insurgency strategy of **"clear, hold, build, and transfer"** has not been fully or effectively implemented. While the military has successfully executed the "clear" and "hold" phases and continues to contribute to the "build" phase within its capacity, **the provincial government has been remiss in its critical responsibilities concerning the latter stages of "build" and "transfer."** The real issue lies not in assigning blame, but in recognizing that it is the provincial government's responsibility to address and tackle the pressing challenge of development in these areas.
4. **KP Profile.** **As per the 2023 census, KP has a population of approximately 40 mn, marking an increase from 35 Mn in 2017, with a growth rate of 2.38%<sup>29</sup>.** KP comprises **17.9% of Pakistan's total population**, characterized by its multi-ethnic makeup, predominantly including **Pashtuns, Hindkowans, Saraikis & Kohistanis.** **The province spans 101,741 sq km and has a gender distribution of 52% males and 48% females.<sup>30</sup>**

Ethnicity*				
Pashtun	Hindko	Saraiki	Kohistani	Others
32 Mn	3.8 Mn	1.2 Mn	1 Mn	2 Mn
*Census 2023				

<sup>29</sup> <https://pwdkp.gov.pk/page/demography>

<sup>30</sup> [https://kp.gov.pk/page/the\\_nwfp\\_local/page\\_no/46](https://kp.gov.pk/page/the_nwfp_local/page_no/46)

## 5. Fact Check - Resources and Efforts in KP

### a. Federal Support to KP

#### 1) NFC

- a) Amount received since 2010/11 - **Rs 4786 bn**
- b) Amount received for FY 2024/25 - **Rs 966.55 bn**<sup>31</sup>
- c) Amount allocation for FY 2025/26 - **Rs 1285.67 bn**

#### 2) PSDP (Since 2014) – High Impact Projects placed at Figure:11.

- a) Projects- **685** (129 completed, 250 ongoing, 306 Bal) (2023/24).
- b) Funds allocated - **Rs 887.4 bn** (Rs 227.37 bn released)<sup>32</sup>.
- c) Funds allocated FY 2025/26- **Rs. 3.29 bn**

Projects	Cost (Mn)	Released (Mn)	Balance (Mn)	Allocation 2024/ 25 (Mn)	Progress
Construction of Motorway from Burhan Hakla on M-I to DI Khan	110,208.000	110,208.000	-	-	100%
Dualization & Improvement of Pindi Gheb - Kohat Road	18700	16,500	2200	1,867.268	93%
Dualization of Indus Highway(N-55) Saral Gambila to Kohat Section	30,130.000	28,000.000	2130	2,000.000	89%
Peshawar Northern Bypass Project (PNBP) 32.2 km (3 <sup>rd</sup> Revised)	27,051.680	18,500.000	8551.68	3,500.000	63%
Khyber Pass Economic Corridor (KPEC) Project-Revised	77,907.960	294,000	77613.96	4,000.000	1%
Construction of Addl Carriageway of Torkham - Jalalabad road project (ACW TJRP) in the Afghanistan (2 <sup>nd</sup> Revised)	17,140.622	959,000	16181.622	4,000.000	1%
Construction of Malakand tunnel (Phase-II)	16,554.000	0000	16554	110.000	0%
Rehabilitation & upgradation of Pezu- Tank road (Length 38 km) 1 <sup>st</sup> Revised	4,778.213	486,660	4291.553	1,000.000	20%
Construction of Yarik-Tank road (length 35 km) Revised	5,414.450	6.660	5407.79	1,000.000	0%
Establishment of Cardiology Unit & Burn/ Trauma Unit at Cat;"A" DHQ Malakand Batkhela (Cost sharing 50:50)	561.762	120.000	441.762	100.00	18%
Khyber Institute of Child Health & Children Hospital (district) Peshawar	7,955334	4,325.693	3629.641	1,500.000	80%
Upgradation and Rehabilitation of Lawrencepur - Tarbela road (25.2 km)	1,830.202	1,3330.000	500.202	100.000	74%
Widening/ carpeting of Booni Buzund Torkhow road district Chitral Upper	1,219.880	1,162.266	57.614	57.616	85%
Construction of road from Zyra to Baboori, Orakzai Agency	3,213.217	2,852.598	360.619	684.521	88%
Construction of main campus of Khushal Khan Khattak University, Karak	1,721.766	40.000	1,681.766	200.00	25%
Development of main campus, Bacha Khan University Charsadda	1,843.061	385.000	1,458.061	400.000	65%
Development of University of Buner at Swari (Phase-I)	1,861.920	392.101	1,468.819	300.000	70%
Development of University of Dir, Sheringal	1,945.118	220.000	1725.118	255.118	80%
Construction of OT at Cen Hosp at Mingora Swat (Revised PC-I)	263.350	46.445	216.905	131.381	52%
Construction of Black Top Road at various places of District Upper and Lower Kurrum	373.000	124.600	248.4	48.000	35%
Construction of Cat-D Hospital at Azam Warsak Tehsil Birmal SWTD Wana	994.630	70.000	924.63	400.000	10%

<sup>31</sup> file:///C:/Users/User/Downloads/1750933449-White%20Paper%202025-26.pdf

<sup>32</sup> Source: PSDP allocation 2025-26 from White Paper

Construction of road and PCC street at District Lakki Marwat	350.000	59.5	290.5	293.000	20%
Construction of PCC road and Drain at District Tank	594.490	527.245	67.245	86.490	92%
Upgradation of existing 132 KV Grid System in District Chitral	309.980	300.0	10.001	10.001	72%
Construction of Operation Theater at Central Hospital at Mingora Swat (Revised PC-I)	263.350	46.445	216.905	131.381	52%
Construction of Black Top Road at various places of District Upper and Lower Kurrum	373.000	124.600	248.4	48.000	35%
Construction of Cat-D Hospital at Azam Warsak Tehsil Birmal SWTD Wana	994.630	70.000	924.63	400.000	10%

**Figure:11 – High Impact Projects**

### 3) NMDs Development

- a) Projects completed - **15475**
- b) Amount (2023/24) - **Rs 392.22 bn** **Figure:12**
- c) Amount allocation (2024/25) - **Rs 139.6 bn**
- d) ADP\* - **Allocation - Rs 174 bn; Rel-Rs 115.5 bn (2023/24).**  
- **Allocation – Rs 36.6 bn (2025-26)**
- e) AIP# - **Allocation - 235.3 bn, Rel 147.6 bn (2023/24).**  
**Allocation – Rs 92 bn (2025-26)**

(\* Annual Dev Plan, #Accelerated Implementation Plan)

Sector	Projects (No)	Amount (bn Rs)
Education	2900	52.74
Health	1570	30.49
Comm Infrastructure	2414	112.26
Water Sup Scheme	2289	42.71
Mosque	327	0.653
Socio-Economic Development	5420	113.61
Police Infrastructure	54	5.03
Misc	501	34.73
<b>Total</b>	<b>15475</b>	<b>392.22</b>

**Figure:12 – NMD Development Funds**

### 4) War on Terror (WoT) Fund (1 % Share)

- a) Amount received since 2010/2011 - **Rs 561.4 bn.**
- b) Amount Allocation for FY 2024/25 - **Rs 116.14 bn.**<sup>33</sup>
- c) Amount Allocation for FY 2025/26 - **Rs 137.91 bn**<sup>34</sup>

### 5) Royalties

- a) Amount received since 2010/11 - **Rs 447.08 bn**
- b) Amount for FY 2024/25 - **Rs 52.97 bn**

<sup>33</sup> <https://www.brecorder.com/news/40309517>

<sup>34</sup> file:///C:/Users/User/Downloads/1750933449-White%20Paper%202025-26.pdf

c) Amount allocated for FY 2025/26 - **Rs 57.11 bn**

- 6) **Corporate Social Responsibility (CSR) Contributions.** Major companies like MPCL, OGDCL, MOL, PPL etc. involved in oil and gas exploration are contributing significant sums of amount for social uplift under Corporate Social Responsibility (CSR) to various districts in KP. So far, **a total of Rs. 1,153.380 Mn has been provided under CSR initiatives of which Rs. 488.621 Mn has been spent, leaving a balance of Rs. 664.761 Mn with KP.**

Distt	Contribution Receipt under CSR (Mn)	Expenditure (Mn)	Balance (Mn)
Kohat	291.089	90.816	200.273
Laki Marwat	33.328	6	27.328
Karak	274.94	144.274	130.666
DI Khan	51.96	11.575	33.994
Tank	16.925	2.7	16.385
Bannu	40.245	15.20	33.145
South Waziristan	10.986	0	10.986
Hangu	318.365	216.586	101.837
North Waziristan	46.618	0	46.618
Orakzai	17.721	1.470	16.261
Kurram	32.984	0	32.984
Khyber	14.284	0	14.284
<b>Total</b>	<b>1153.380</b>	<b>488.621</b>	<b>664.761</b>

- 7) **Overall budgetary allotments to KP for FY 2025/ 26, is Rs 2119 bn.**

- b. **Tax Collection.** Tax collection in KP is significantly low as compared to other provinces. **In FY 2024-25, taxes collected from KP amounted to meagre 6 percent of national tax collection. (Figure:13)**

Province	Provincial Taxes (In Bn Pkr)	% of Provincial contribution in total Provincial tax (175,391 Mn Pkr)
PUNJAB	300	42.5%
SINDH	306.6	43.4%
<b>KHYBER PAKHTUNKHWA</b>	<b>51.56</b>	<b>7.3%</b>
BALUCHISTAN	47.69	6.7%

**Figure:13 – Tax Collection**

c. **Electricity**

- 1) **KP produces 19,987 GWh of electricity, which constitutes 14.34% of the country's total generation capacity. KP consumes 11,114 GWh, or 9.72% of the national total, leaving a surplus of 4.6% only.**

**(Figure:14)<sup>35</sup>**

Items	Pak	KPK	% of KPK
Generation	139,380	19,987	14.34
Consumption	114,300	11,114	9.72

**Figure:14 – KP Electricity Generation Vs Consumption**

- 2) Tarbela which is major source of Hydel electricity in KP which was built by state of Pakistan in 1976 spending 2 bn US Dollars. **4<sup>th</sup> extension of Tarbela completed by Federal Govt in 2018 spending Rs 83 bn (Figure:15)**. Production of electricity in Tarbela is dependent on waters flowing from GB.

<sup>35</sup> Development statistics of KP (2024 Report)



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## Power House Progress Photos (PDF)

### Intake Pictorial Progress (PDF)

Tarbela 4<sup>th</sup> Extension Hydropower Project

Salient Features of Project

Capacity	1410 MW
Generating Units	3 x 470 MW
Annual Energy Generation	3840 GWh
EIRR	30.3% ~ 36. 7%:
Cost per kWh as per PC-1	Rs. 1.623
Date of Commencement	29.10.2013
Date of Commissioning	25.02.2018
Implementation Period	5 Years

History of Approval of Project

**PC-I approved by ECNEC :**            08.2012

**PC-I cost :**                            PKR 83.6 billion with FEC 65.8 billion

### Figure:15 – 4<sup>th</sup> Extension of Tarbela Hydropower Project

- 3) Recently, Federal Govt has launched multiple projects, including major initiatives like the [Gorkhan Matiltan Hydropower Plant](#) and the [Daral Khwar Hydropower Project](#). In fact, **20 x small dams are in pipeline**. These dams including [Abbasi Band](#), [Samandi](#), [Dilawati Wand](#), and [Tati Wand](#) will receive Rs 1.21 bn, while the [Tora Wari Dam](#) in Hangu will get Rs 871 mn, [Palai](#), and [Kandol Dams](#) will get Rs 692 mn, the [National Program for improvement of water courses](#), will receive Rs 522 mn, and the [Chashma Akora Khel Dam](#) in Karak, will get Rs 518 mn.<sup>36</sup>
- 4) Despite this surplus, the province faces significant issues with electricity bill payments. **Combined loss of PESCO and TESCO for 2023-2024 was Rs 188 bn.**<sup>37</sup> In yr 2022 – 2023, **Rs 137 bn worth electricity was stolen in KP**; highest of all provinces. **Out of 59 circles of WAPDA, 10 circles have electric theft of more than 60%**. Out of these 10 circles,

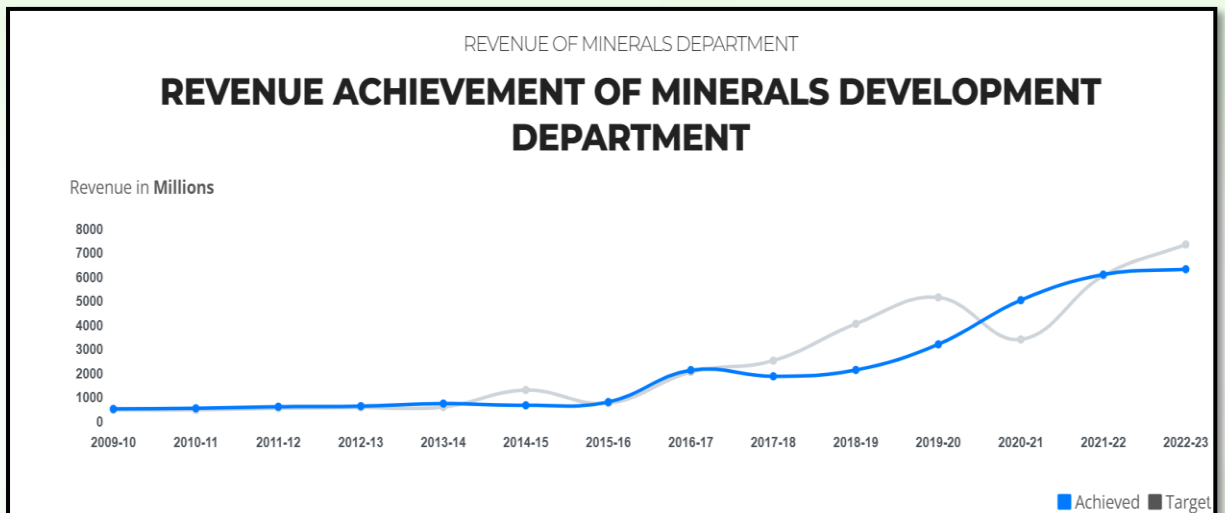
<sup>36</sup> <https://www.pakistantoday.com.pk/2024/05/29/kp-to-receive-rs-25-83-billion-grant-from-federal-govt/>

<sup>37</sup> <https://www.brecorder.com/news/40299863>

5 are in Balochistan, **3 are in KP (DI Khan, Bannu and Mansehra)** while 2 are in Sindh.

d. **KP Mineral Resources**

- 1) KP has estimated **reserves totaling 264.83 Mn barrels of oil, of which 170.59 Mn barrels have already been consumed**.<sup>38</sup> This leaves only **94.24 Mn barrels remaining**, indicating that the province may soon deplete its resources.
- 2) **KP generated a revenue of 6,000 Mn, falling short of the expected 7,000 Mn (Figure:16)**. This discrepancy indicates that the province did not meet its capacity expectations.<sup>39</sup>



**Figure:16– Revenue Minerals Department (KP)**

- 3) **Marble**. **78 percent of the marble is produced in KP**. Most of it is sold to the markets of other provinces.

b. **KP's Dependency on Other Provinces**. Despite claims of self-sufficiency, KP is significantly dependent on other provinces for essential resources.

- 1) **Wheat**. KP requires **5 mn tonnes of wheat annually**, but its total **wheat production is only about 1.4 mn tons, with an average per**

<sup>38</sup> <https://tribune.com.pk/story/2390854/most-of-pakistans-oil-gas-reserves-consumed>

<sup>39</sup> <https://www.kpminerals.gov.pk/index.php>

**capita consumption of 124 kg.** The deficient 3.6 mn tons is imported from other provinces notably Punjab <sup>40</sup>.

- 2) **Rice. KP's rice production stands at 1.39% of Pakistan's total production**, indicating another area where it depends on other provinces<sup>41</sup>.
- 3) **Sugarcane. KP produces 4844 metric tons**, which is **5.53 % of the total product (87638 metric tons)**.
- 4) **Exports. In total exports of Pakistan, 76 % of total exports are dealt by ports of Karachi while KP's share is only 0.28 % (Ghulam Khan 0.2% and Peshawar 0.08%)**<sup>42</sup>, reflecting dependency of KP on seaports in Sind and Balochistan for connectivity abroad.
- 5) **Local Business. Local investors in KP have shifted their investments to other provinces, especially Punjab. The business environment for medium and small-sized investors in KP is not conducive or competitive, leading many to relocate to central Punjab. In Punjab, the cost of doing business is lower, and there is a larger consumer market. More than 70% of products from KP manufacturing units are sold in Punjab.**
- 6) **Live Stock**<sup>43</sup>. Held stock of buffalos in KP is approximately **3.27 Mn which is 7% of the total stock held in Pakistan i.e. 46.3 Mn. Similarly, sheep/ goat stock in KP is 19.68 Mn which is 16 % of the total held stock in Pakistan i.e. Rs 191.7 Mn.**

## 6. **The Parachinar/ Kurram Conundrum**

- a. The core issue in Kurram dates back to sectarian tensions that began in 1961, fueled by long-standing land disputes, external instigation and local mistrust, leading to recurring violence and instability.

<sup>40</sup><https://www.dawn.com/news/1725189#:~:text=They%20said%20the%20province%20had,capita%20wh eat%20consumption%20was%20124kg.>

<sup>41</sup> Rice paddy analysis for 2022-23

<sup>42</sup> <https://propakistani.pk/2024/09/02/karachi-ports-handle-76-of-countrys-exports-report/>

<sup>43</sup> <https://jassaraftab.com/economic-survey-livestock-data-2024/#:~:text=Livestock%20Data%202024%20and%20Livestock%20Population&text=The%20number%20of%20cows%20increased,84.7%20million%20to%2087%20million>

- b. These recurrent clashes have inflicted significant human and material losses, triggered mass displacement and severely impeded the region's peace, governance and socio-economic development.
- c. Following the late 2024 clashes in Kurram, the govt of Pakistan, in coordination with the provincial authorities and security forces, implemented comprehensive measures to restore peace and stability in Kurram (Parachinar).
- d. The government **convened a series of jirgas of tribal elders, Maliks, and local leaders to foster dialogue and rebuild trust, culminating into the Fourteen-Point Kohat Peace Accord of January 2025 (Figure:17)**, which aimed to restore peace and ensure lasting stability in the region. **A high-level Apex Committee meeting** was held to design a strategic plan for stabilization (**Kurram Stability Plan**) in three phases: -
- 1) **De-bunkerization. 1,052 militant bunkers demolished**, weakening the operational capability of hostile elements.
  - 2) **De-weaponization**. Initiated on 25 April 2025, resulting in the recovery of **545 x weapons and 79,762 rounds of ammunition**.
  - 3) **Raising of RPF. A Road Protection Force (RPF) comprising 350 x ex-servicemen** was established (from Thal to Parachinar) within three months to secure transport routes and prevent future attacks. **154 x security posts were set up along key routes to strengthen surveillance** and ensure a permanent security presence.
- e. Additionally, the Pakistan Army launched major relief and rehabilitation operations, **conducting 388 x helicopter sorties and evacuating 9,288 individuals from conflict zones**.
- f. Around **29,140 kilograms** of medicines were distributed to ensure timely medical aid for affected families.
- g. **To promote lasting peace, the government launched six development and rehabilitation projects**, including solarization, irrigation systems, transport facilities, solar streetlights and futsal grounds.
- h. Technical training initiatives and youth development schemes have also been introduced to equip young people with employable skills and expand their access to livelihood opportunities.

### KOHAT PEACE ACCORD – 14 POINTS

1. **Upholding Previous Agreements:** All parties and the Kurram Peace Committee shall uphold the Murree Agreement 2008 and all prior accords to maintain peace and promote the welfare of local residents.
2. **Action Against Trespassers and Miscreants:** Strict action will be taken against individuals trespassing on roads. Villagers and peace committees shall cooperate with law enforcement agencies. Anyone harboring or assisting miscreants will be deemed guilty under tribal and state law.
3. **Responsibility for Road Incidents:** In the event of any untoward incident on main roads, residents of the concerned area must prove their innocence in line with Kurram traditions. The KP Apex Committee's decisions will be implemented to ensure road security.
4. **Repatriation of Displaced Persons:** All displaced families shall be rehabilitated in their native areas without obstruction.
5. **Supervisory Sub-Committee:** A sub-committee - headed by the Deputy Commissioner and including the DPO and two members each from Upper and Lower Kurram - will oversee the repatriation process.
6. **Resolution of Land Disputes:** Land disputes in Gedu, Pekar Alizai, Balishkhel, Dandar, Ghoz Ghari, Nisti Kot, Kunj Alizai, Shorko, Sadda, and Bagan Alizai shall be resolved per revenue records, traditions, and the Land Commission's terms of reference.
7. **Activation of the Land Commission:** The Land Commission will commence work immediately with the cooperation of peace committees, local administration, and law enforcement agencies.
8. **Implementation of Section 144:** Where Section 144 is enforced, both sides must comply with previous orders and respect already settled disputes.
9. **Ban on Weapons and Fundraising for Arms:** Display of weapons and collection of donations for purchasing arms are strictly prohibited. Within two weeks, both sides must submit a plan to enforce the provincial cabinet's ban on arms.
10. **No Use of Weapons Against Each Other:** After the agreement, neither side shall use arms against the other. Violations will invite government action with peace committee assistance, confiscation of weapons, and a fine of Rs. 10 mn on the guilty area or village.

11. **Prohibition of Sectarian Conflict and Outlawed Groups:** No tribe or person may turn personal disputes into sectarian ones. Banned outfits cannot open offices or operate within the district; violators will face legal consequences.
12. **Free Movement on Roads:** Roads shall remain open and free of restrictions. Both sides must ensure traveler safety, protect women's dignity, and prevent desecration of bodies.
13. **Protection for State and Private Employees:** Government and private employees - including teachers, judges, and others—may serve anywhere in Kurram without fear. Local elders are responsible for their safety under Pakhtunwali traditions of hospitality.
14. **Control of Hate Speech, Ceasefire, and Crisis Response:** Individuals spreading hate or sectarian propaganda—especially on social media—will face strict punishment. Peace committees must promptly defuse crises; aggrieved sides will not retaliate. Construction of new bunkers is banned; existing ones will be demolished within a month, and the ceasefire will remain permanent.

#### **Figure:17 – Kohat Peace Accord**

#### 7. **A Pathway to Lasting Peace**

- a. Despite the realities outlined above, certain dissident factions have skillfully manipulated facts, preying on the sensitivities and perceived deprivations of society to propagate their misinformation campaigns.
- b. The solution to these challenges lies in a unified national approach. The state has already fulfilled its responsibility by securing and cleansing the region from the menace of Fitna-al-Khawarij, while allocating substantial funds for rehabilitation. However, the local civil administration's efforts have fallen short of expectations.
- c. The resilient Pashtun culture and their proud history demonstrate an enduring capacity to stand against all odds. A recent example is the Pashtuns' support for the state and their collaboration in the form of tribal committees (Chalwishti/Lashkar) with the Pakistan Army in eradicating Fitna-al-Khawarij and dismantling their bases.
- d. The sacrifices made by the Pakistan Army and their Pashtun brethren testify to this unity and strength. The survival of KP resides in the fact that Pashtoon

community of KP stands with Pakistan Army and negates the false propaganda of PTM.

8. **Conclusion**. The narrative that KP is being exploited for its resources by the military or other provinces is misleading and unfounded. The presence of the military in the region is based on the directives and agreement of both the Federal and Provincial governments, aimed at ensuring stability and security. The real challenge lies in the provincial government's responsibility to focus on the development and prosperity of its people, particularly in the newly merged areas. It is imperative that KP's leadership seizes the opportunity presented by the substantial resources provided by the Federal Government to drive sustainable development and uplift the region, ensuring prosperity for its people and fostering national unity, rather than being distracted by divisive myths.



## AJ&K

1. **Context.** AJ&K (Azad Jammu and Kashmir), nestled in the picturesque Himalayas, is a region of breathtaking beauty and rich cultural heritage. The area has undergone a phenomenal transformation over decades, rapidly evolving into a world-class region that harmoniously blends natural splendor with modern development. With state-of-the-art infrastructure projects, burgeoning educational and healthcare facilities, and a growing emphasis on tourism and eco-friendly initiatives, the region is establishing itself as a global example of balanced development. Governed by its own president and prime minister, it enjoys semi-autonomous status within Pakistan. Blessed with lush valleys, towering peaks, and serene rivers, it's a heaven for nature enthusiasts and adventurers alike. The diverse population, comprising various ethnicities, contributes to its vibrant tapestry of traditions and customs. AJ&K's economy thrives on agriculture, tourism, and remittances. Despite political complexities, its people exhibit resilience and hospitality, embodying the essence of freedom and resilience in the face of challenges.

### 2. **Demography of AJ&K**

#### a. **Population of AJ&K**

- 1) Total Population: **4.361 mn.**<sup>44</sup>
- 2) Population Growth Rate: **2.41%.**<sup>45</sup>

b. **Gender & Religion.** In segregated terms, the population of AJ&K comprises of 49% males and 51% females i.e. **95 males per 100 females whereas almost 100% population is Muslim.**<sup>46</sup>

c. **Population Density.** The population density of AJ&K presently stands at **330 persons per sq.km**<sup>47</sup>

d. **Literacy Rate.** The literacy rate in Azad Jammu and Kashmir (AJ&K) is **77.8%, with male literacy at 88.9% and female literacy at 68.2%.**<sup>48</sup>

e. **Languages.** Urdu is the official language of Azad Kashmir but is spoken by only a minority of people. Other languages are Gojri, Kashmiri, and Pahari. The dominant language in the state is Pahari, which is very similar to Pothwari and Hindko.<sup>49</sup>

<sup>44</sup> <https://ajk.gov.pk/glance/>

<sup>45</sup> <https://ajk.gov.pk/glance/>

<sup>46</sup> <https://www.pndajk.gov.pk/uploadfiles/downloads/AJ&K%20Statistical%20Year%20Book%202019.pdf>

<sup>47</sup> <https://www.pndajk.gov.pk/uploadfiles/downloads/AJK%20at%20a%20Glance%202023.pdf>

<sup>48</sup> <https://www.pndajk.gov.pk/uploadfiles/downloads/AJK%20at%20a%20Glance%202023.pdf>

- f. Ethnicities. The communities living in this part of J&K are Gurjar, Jat, Awan, Abbasi, Sudhan and other ethnic Kashmiri populations from and around the Valleys of Neelam and Leepa respectively.<sup>50</sup>
- g. **Employment by Sector**
- 1) **Agriculture**. 20.80% (12.20% males, 64.10% females)
  - 2) **Industry**. 26.2% (31.2% males, 0.8% females)
  - 3) **Services**. 53% (56.6% males, 35.1% females)
  - 4) **30% of AJ&K's population is employed in government jobs.**
- b. **Government Employment Quota**. Government emp quota for AJ&K is **2%**
- c. **Army Employment Quota**. Army emp quota in AJ&K is **7%**.<sup>51</sup>
3. **Geography of AJ&K**
- a. **Area**. The total area of the **AJ&K region is 13,297 square kilometers**.<sup>52</sup>
  - b. **Administrative Divisions**. Presently, **AJ&K is divided into 3 divisions (Muzaffarabad, Poonch and Mirpur with 16%, 12% and 11% population respectively), with 10 administrative districts and 32 Sub-divisions** having Muzaffarabad city as the State capital.<sup>53</sup>
4. **Budget Allocation**
- a. **Aligned** with the government's focus on development in AJ&K, the Budget allocation for the region has been significantly increased over the years.
  - b. **Over the past five years, the grants and transfers allocated for AJ&K has seen a 52% surge, with the latest allocation being Rs. 105000 Mn for FY 2025.**
5. **Infrastructure and Energy Projects**
- a. **Projects under CPEC**
    - 1) **Ongoing Projects**
      - a) Extension of Hazara Expressway from Mansehra to Muzaffarabad has been planned to enhance accessibility to AJ&K.

<sup>50</sup> <https://www.efsas.org/publications/study-papers/ethnic,-cultural-and-religious-diversity-in-jk-unity-and-discord/>

<sup>51</sup> From the document 'Comparative Analysis AJK

<sup>52</sup> <https://www.pndajk.gov.pk/uploadfiles/downloads/AJK%20at%20a%20Glance%202023.pdf>

<sup>53</sup> <https://www.pndajk.gov.pk/uploadfiles/downloads/AJK%20at%20a%20Glance%202023.pdf>

- b) **700.7MW Azad Pattan Hydropower Project**, AJ&K/Punjab, is an ongoing project on Jhelum River, initiated under CPEC. The project is estimated to generate an average 3000 jobs during dam construction.
- c) **1124 MW Kohala Hydropower Project**, AJ&K is an ongoing project on river Jhelum near Muzaffarabad. The project is expected to generate more than 7500 jobs during dam construction process.
- 2) **Completed Projects. 720 MW Karot Hydropower Project**, AJ&K/Punjab on 29 Jun 2022 (Total jobs created during construction of this project were **4870**).<sup>54</sup>
- 3) **Planned Projects. Mirpur Industrial Zone (SEZ).**
- b. **PSDP Projects**
- 1) **Ongoing** (Allocated amount: **Rs. 30400 Mn – FY 2024/25**)<sup>55</sup>.
- 48 MW Jagran-II** Hydro Power Project AJ&K
  - AJ&K Legislative Assembly Complex
  - Construction of Rathoa Haryam Bridge across Reservoir Channel on Mirpur-Islamgarh Road
  - Noseri -Leswa Bypass Road
  - Rehabilitation of Affected Population residing along LoC
  - MBBS Medical College Mirpur
  - Water Supply and Sewerage Scheme Mirpur City and Hamlets
  - Mir Wazir Muhammad Farooq Shaheed Medical College, Muzaffarabad
  - Construction of Athmuqam - Sharda-Kel - Taobat Road Section (109.2 km) including two tunnels at Kahori/ Kamser (3.7 km) and Challpani (0.6 km) Section of Neelum Valley Road, Azad Jammu & Kashmir (AJ&K)
- 2) **New Projects. Establishment of 40 MW Dowarian Hydro Power Project**, District Neelum (Allocated amount: Rs. 100 Mn).

<sup>54</sup> <https://cpec.gov.pk/progress-update>

<sup>55</sup> [https://www.pc.gov.pk/uploads/archives/PSDP\\_2022-23\\_Final.pdf](https://www.pc.gov.pk/uploads/archives/PSDP_2022-23_Final.pdf)

c. **PSDP IT Industry**

- 1) Establishment of Data Centre for providing Cloud Based Services in AJ&K and GB (SCO).
- 2) Expansion of Broadband Services in Cities & Towns of AJ&K and GB (SCO).
- 3) Upgradation of Transmission Network and Replacement of Optical Fiber Cable in AJ&K & GB.

d. **Other Infrastructure Projects**

- 1) **Telecom Facilities. 96 exchange sites with a capacity of 117,223 and 28,300 connections.**
- 2) There are **91 DSL sites with a capacity of 14,712 and 9,318 connections.**
- 3) The DXX service have 22 sites with a capacity of 310 and 16 connections.
- 4) The region has 1411 telecom towers with **100% telecom density.**

<b>Telecom Towers</b>	
Telenor	425
Zong	310
Jazz	260
Ufone	200
<b>Total</b>	<b>1411</b>
Telecom Density in AJK	100%

- 5) Telecom operators prefer to target population hubs with business interests.
- 6) SCO being public organization, provides services despite losses.
- 7) SCO and Zong provide best web page loading time.
- 8) Postal Communication. There are **7 General Post Offices and 117 Sub Post Offices.**<sup>56</sup>

- e. **Electricity Supply/Production in AJ&K. AJ&K produces 28.5% of hydel power** and its total contribution to the national grid is **6.44%**. AJ&K locals are provided with electricity on subsidized prices and thus electricity prices are

<sup>56</sup> <https://www.pndajk.gov.pk/uploadfiles/downloads/AJK%20at%20a%20Glance%202023.pdf>

lowest in AJ&K (**Rs. 3/unit up to 100 units** for domestic users and **Rs. 10/unit up to 300 units** for commercial users) as compared to the rest of the state.

## 6. Minerals in AJ&K

- a. **Bentonite**. Found in Mirpur and Bhimber, bentonite reserves are estimated at 4.5 mn tons, with a Minehead value of Rs. 6,750 mn (**Rs. 6.75 bn**).
- b. **Granite**. Found in Muzaffarabad and Neelum, granite reserves total 700 mn tons, valued at Rs. 560,000 mn (**Rs. 560 bn**) at the Minehead.
- c. **Marble**. Located in Muzaffarabad, Neelum, and Kotli, marble reserves amount to 40 mn tons, with a Minehead value of Rs. 40,000 mn (**Rs. 40 bn**).
- d. **Coal**. Found in Muzaffarabad and Kotli, coal reserves are estimated at 30 mn tons, valued at Rs. 21,000 mn (**Rs. 21 bn**) at the Minehead.
- e. **Limestone**. Found in Muzaffarabad, limestone reserves are estimated at 100 mn tons, with a Minehead value of Rs. 120,000 mn (**Rs. 120 bn**).
- f. **Gypsum**. Located in Muzaffarabad and Jhelum Valley, gypsum reserves total 5 mn tons, valued at **Rs. 1,250 mn (Rs. 1.25 bn)** at the Minehead.
- g. **Bauxite**. Found in Kotli, bauxite reserves are estimated at 7 mn tonnes, with a Minehead value of Rs. 1,750 mn (**Rs. 1.75 bn**).
- h. **Fireclay**. Located in Kotli, fireclay reserves are 7 mn tons, valued at Rs. 1,750 mn (**Rs. 1.75 bn**) at the Minehead.
- i. **Quartzite**. Found in Kotli, quartzite reserves total 7 mn tons, with a Minehead value of Rs. 1,400 mn (**Rs. 1.4 bn**).
- j. **Ruby**. Found in Neelum, ruby reserves are estimated at 50 tons, with a Minehead value of Rs. 25,000 mn (**Rs. 25 bn**).

## 7. Healthcare Services in AJ&K

- a. **Healthcare institutions**<sup>57</sup>
  - 1) 8 x Teaching / Other Hospitals.
  - 2) 7 x DHQ Hospitals.
  - 3) 14 x THQ Hospitals.
  - 4) 46 x RHCs.
  - 5) 236 x BHUs.
  - 6) 78 x Dispensaries.
  - 7) 160 x Malaria Centers.

<sup>57</sup> <https://www.pndajk.gov.pk/uploadfiles/downloads/AJK%20at%20a%20Glance%202023.pdf>

- b. **PSDP Projects**<sup>58</sup>
- 8) Prevention and Control of Blindness (PCB) Program in AJ&K.
  - 9) Treatment of Poor Cancer Patients of ICT, AJ&K & GB.
  - 10) **Atomic Energy Cancer Hospital** - Azad Jammu and Kashmir (AECH AJ&K)
- c. **CPEC Projects.** Establishment of Burn Centre AJ&K. Other details are as following: -
- 1) Deficient **187 doctors** are attributed to medical students graduating from **mainland do not prefer to return**. Around 200 PG trainees in AJ&K at present. (from doc comparative analysis of AJ&K)
  - 2) All AJ&K residents are entitled to free medical treatment at military health facilities, which significantly share the healthcare load in AJ&K. Approximately **1,180,000 patients are treated at Army medical facilities annually**.
  - 3) A leading digital healthcare platform in collaboration with local health and information technology departments, has **launched tele-medicine project in AJ&K to connect Basic Health Units (BHUs)** with qualified physicians and surgeons in the country.
  - 4) **Sehat Kahani has begun from 13 BHUs with hope to scale more than 25 BHUs which would impact more than 100,000 lives within the next 2 years** with the support and collaboration of the IT department and other stakeholders.<sup>59</sup>
- d. **Patient-Bed Ratio.** Best ratio in complete Pakistan due to **military facilities augmenting State Healthcare sys in AJ&K**.

## 8. **Education Sector in AJ&K**

- a. **Educational Institutions in AJ&K**<sup>60</sup> **(Figure:18)**
- 1) 4032 x Primary and Mosque Schools.
  - 2) 1048 x Middle Schools.
  - 3) 789 x High Schools.
  - 4) 121 x Higher Secondary Schools.
  - 5) 88 x Inter Colleges.

<sup>58</sup> [https://www.pc.gov.pk/uploads/archives/PSDP\\_2023-24.pdf](https://www.pc.gov.pk/uploads/archives/PSDP_2023-24.pdf)

<sup>59</sup> <https://www.app.com.pk/national/tele-healthcare-project-launched-in-ajk-to-facilitate-rural-population/>

<sup>60</sup> <https://www.pndajk.gov.pk/uploadfiles/downloads/AJK%20at%20a%20Glance%202023.pdf>

- 6) 79 x Degree Colleges.
- 7) 13 x Post Graduate Colleges.
- 8) 3 x Medical Colleges.
- 9) 7 x Universities.

<b>Education</b>				
<b>Govt. Institutions</b>	<b>Nos.</b>	<b>Enrolment by Level (Nos.)</b>	<b>Staff (Nos.)</b>	
<b>Primary/High/Higher Secondary Schools</b>				
<b>Primary &amp; Mosque Schools</b>	<b>4032</b>	<b>185,152</b>	29,011	
Male	2,177	90,520		
Female	1,855	94,632		
<b>Middle Schools</b>	<b>1,048</b>	<b>118,386</b>		
Male	527	59,144		
Female	521	59,242		
<b>High Schools</b>	<b>789</b>	<b>176,862</b>		
Male	409	90,399		
Female	380	86,436		
<b>Higher Secondary Schools</b>	<b>121</b>	<b>38,675</b>		
Male	51	15,803		
Female	70	22,872		
<b>Inter/Degree/Post Graduate Colleges</b>				
<b>Inter Colleges</b>	<b>88</b>	<b>14,055</b>	2,716	
Male	42	8,096		
Female	39	5,959		
<b>Model Science Colleges</b>	<b>07</b>	<b>2,097</b>		
<b>Degree Colleges</b>	<b>79</b>	<b>23,486</b>		
Male	32	9750		
Female	47	13,736		
<b>Post Graduate Colleges</b>	<b>13</b>	<b>15,995</b>		
Male	7	10,188		
Female	6	5,807		
<b>Universities</b>	<b>7</b>	<b>-</b>		-

**Figure:18 – Education (AJ&K)**

**b. PSDP Education Programs (On-going)**

- 1) Development of Academic and Research Facilities at University of Kotli, AJ&K.

- 2) Establishment of AJ&K Women University, Bagh, AJ&K.
  - 3) Strengthening of the University of Poonch Rawalakot, AJ&K.
  - 4) Strengthening of the Women University of AJ&K Bagh.
  - 5) Strengthening of University of Poonch, Rawalakot AJ&K (Phase II).
  - 6) MBBS Medical College Mirpur.
  - 7) Mir Waiz Muhammad Farooq Shaheed Medical College Muzaffarabad.
- c. Despite its small size, **AJ&K has a strong educational system with 5,974 schools and seven universities.**
  - d. Overall, in AJ&K 81% of children complete primary school, 75% complete middle school and 55% complete secondary school.<sup>61</sup>
  - e. In line with the population, a **2% quota is reserved for AJ&K higher education in Pakistan**, with **125 seats** allocated across 22 universities.<sup>62</sup>
  - f. The **Government of Punjab has allocated Rs 750 mn for the KEEF** (AJ&K Education Endowment Fund).
  - g. Additionally, **36 seats are reserved in medical colleges in Punjab for students from AJ&K.**<sup>63</sup>
  - h. The teacher-to-student ratio at AJ&K is an 1:16.04, the best in the country.<sup>64</sup>
9. **Tourism Sector in AJ&K**
- a. The **tourism sector in AJ&K has shown significant growth, with a notable increase in visitors over the past few years.**
  - b. The region noted a record 1.734 mn visitors in the year 2022.<sup>65</sup>
  - c. **'Toli Peer AJ&K' crown jewel has become as the premier tourist destination in Poonch District, enticing visitors with its resplendent beauty.**<sup>66</sup>
  - d. One of the most famous spots is Neelum Valley, a stunning stretch of land nestled between the mountains. With its flowing rivers, verdant meadows, and charming villages like Keran and Sharda, it's the perfect place to disconnect and experience the beauty of nature.

<sup>61</sup> [https://www.pndajk.gov.pk/micsajk/3-AJ&K\\_MICS\\_2020-21\\_SNAPSHOTS.pdf](https://www.pndajk.gov.pk/micsajk/3-AJ&K_MICS_2020-21_SNAPSHOTS.pdf)

<sup>62</sup> <https://www.dailyparliamenttimes.com/2024/08/11/ajk-excels-in-key-indicators-compared-to-iiobjk-and-pakistan/>

<sup>63</sup> <https://tribune.com.pk/story/2487223/azad-jammu-kashmir-a-fact-check>

<sup>64</sup> <https://policy-wire.com/a-statistical-overview-and-reality-check-of-ajk/>

<sup>65</sup> <https://pndajk.gov.pk/uploadfiles/downloads/AJK%20at%20a%20Glance%202023.pdf>

<sup>66</sup> <https://www.app.com.pk/features/toli-peer-emerges-as-top-tourist-destination-in-azad-kashmirs-poonch-distt/>

- e. Another must-see is Ratti Gali Lake, located high in the mountains at over 12,000 feet. This alpine lake is surrounded by snow-covered peaks, creating a breathtakingly beautiful scene that draws photographers, nature lovers, and adventurers.
- f. From the ancient Sharda Peeth temple, an important pilgrimage site, to the ruins of forts and historical buildings scattered across the region, AJ&K is a treasure trove of culture and history. The blend of Kashmiri, Punjabi, and Central Asian influences gives the region a unique cultural identity that sets it apart from other parts of the world.

10. **Current Challenges and Ground realities in AJ&K**

- a. The Jammu and Azad Kashmir Action Committee (JAAC) has been a prominent faction involved in instigating protests and civil unrest in the region of Azad Jammu and Kashmir (AJ&K). The group has organized significant violent demonstrations in various locations, including Muzaffarabad, Rawalakot, Baroiana, Belah Noor Shah, Akalgarh, Neelum Bridge, Sangola Village, Bararkot, Lohar Gali, and Poonch, challenging the governance structures of AJ&K.
- b. The group persistently destabilizes peace and stability in the region by mobilizing masses against the authorities by over exaggerating non-issues into significant crises.
- c. By amplifying grievances such as the inflated claims of high electricity prices, and fabricated economic hardships due to allegedly reduced subsidies, the group creates an environment of fear and unrest. These fabricated concerns are strategically presented as major threats to the wellbeing of the people, without considering the economic complexities like inflation. Such artificial crises are then given international projections via various media platforms by hostile sponsors (HIAs), especially on Indian Media.
- d. **Aligned with the Indian hostile agenda of making CPEC a failure through terrorist attacks, AAC served as a major impediment to the implementation of CPEC** related projects in AJ&K and GB by organizing mass protests and campaigns, alleging exploitation of resources by foreign agents. **The same group, while impeding development projects on one hand, mobilize masses under these self-aggravated grievances that they do not let the authorities to resolve.**

e. **AAC's 38 Pt Charter of Demand and its Viability.** **AAC in its latest round of disruptive protests unveiled a 38-point charter**, purportedly aimed at delivering **"relief" to the people of AJ&K**. However, a careful and dispassionate analysis reveals that many of these propositions are not only misleading in substance but, if enacted, could **undermine the region's socioeconomic stability, fiscal integrity, and long-term developmental trajectory**. Rather than offering viable solutions, the charter appears to rest on **populist rhetoric**, lacking both **economic foresight** and **institutional coherence**. Outlined below are critical observations that underscore the socio-economic and institutional risks posed by the charter.

- 1) The **approved budget for AJ&K for FY 2025-26 stands at Rs. 310 bn**. Of this amount, **Rs. 153 bn is generated through AJ&K's own revenues, while Rs. 157 bn is provided as federal assistance**. Notably, **more than 50% of the total budget is allocated to the salaries of government employees and pensions**. Any proposed reduction in revenue through tax cuts will directly result in a budgetary shortfall that will adversely affect development projects, infrastructure, and essential public services including health and education. It is imperative to ask: What is AAC's concrete plan to address this fiscal deficit?
- 2) The matter of the 12 reserved seats for migrated families from IIOJK is of national significance. Abolishing these seats would amount to **abandoning both AJ&K's and Pakistan's historic and principled stance on the Kashmir dispute and accepting the status quo** — an agenda point that may be on India's behest but neither acceptable to the people of AJ&K nor to Pakistan.
- 3) During the last 18 months, due to protests and blockages of AAC, AJ&K has experienced a **48% decline in tourism**, leading to a revenue loss of approximately 167 bn. Furthermore, the erosion of investor confidence due to violent protests has **resulted in an additional around Rs. 250 bn in economic losses**. The proposed tax reductions under AAC's plan are negligible when compared to the daily financial losses being suffered due to instability and unrest caused by them on daily basis.

- 4) AJ&K's **telecommunications network consists of 1,411 towers, including 218 SCOM towers which ensure connectivity even to remote and far-flung areas.** The **average installation cost of a single SCOM tower is Rs. 50 mn, with recurring maintenance expenditures of Rs. 0.5 mn.** **Despite the fact that average revenue per tower is only Rs. 40,000-50,000 per month,** SCOM continues to provide coverage even in areas where private telecom operators do not invest, as they operate solely on a profit basis and focus only on densely populated regions. Burden is thus shared by Federal Government and the SCO. The question remains: Who will provide telecom services to remote valleys and border areas if SCOM operations are compromised?
- 5) Despite some shortcomings, the current governance system in AJ&K has delivered tangible progress. Key social indicators are consistently better than those across the Line of Control: -
  - a) **Literacy Rate.** AJ&K 76.8% vs. IIOJK 67%.
  - b) **Doctor-Patient Ratio.** AJ&K 1:2,315 vs. IIOJK 1:2,660.
  - c) **Hospital Beds per 1,000 People.** AJ&K 0.8 vs. IIOJK 0.6.
  - d) **Telecom Density.** AJ&K 100 vs. IIOJK 69.98.
  - e) **Poverty Index.** AJ&K 22% vs. IIOJK 49%.
- 6) These achievements are the result of years of sustained policy efforts and must not be undermined by disruptive agendas.
- 7) If AAC or any other group has reservations, these should be addressed through the in place democratic process and the elected Legislative Assembly, rather than through agitation or violent protests. Such actions harm the ordinary citizens of AJ&K, disrupt economic activity, and play into the hands of those seeking to destabilize the region.
- 8) A dispassionate and fact-based review of AAC's 38-point agenda establishes that they are baseless and appears designed to serve the political ambitions of a few power-hungry individuals, rather than the welfare of the people. Violence and agitation are no solution — dialogue, legislation, and democratic engagement are the only viable paths forward.

11. **Conclusion.** The transformation of AJ&K over the past decades stands as a testament to the region's remarkable journey toward modernization and progress. With each passing year, the region has made significant strides in infrastructure, education, healthcare, and sustainable development, all while preserving its unparalleled natural beauty and rich cultural heritage. The commitment to advancing public welfare and economic vitality remains steadfast, as AJ&K continues to leverage its vast potential in sectors such as hydropower, tourism, and agriculture. Through continued investment in both human and infrastructural capital, the government is positioning AJ&K as a beacon of growth and prosperity to pave the way for improved living standards for all in the region.



## GILGIT BALTISTAN (MYTHS VS REALITIES)

### 1. Geography

- a. Area: **72,971 km**
- b. Hosts over 700 x peaks above 6000 meters.
- c. More than 108 x peaks above 7000 meters including 5 x of the highest peaks in the world. [world second highest peak, a rock pyramid K-2 (8611m), the killer mountain Nanga Parbat (8126m), the Hidden Peak of Gasherbrum I (8068m), the Broad Peak (8057m) and the Gasherbrum II (8035m)].



### d. Administrative Division<sup>67</sup> (Details at **Figure:19**)

- 1) 3 x Divisions (Gilgit, Baltistan, and Diamer-Astore).
- 2) 10 x administrative districts.
- 3) 23 x sub-divisions and 103 x Union Councils.
- 4) The **governance and administration of local areas in GB are overseen by the Local Government & Rural Development Department**. It manages 3 x Municipal Corporations, 10 x District Councils, and 7 x Municipal Committees, ensuring efficient local governance and development at the grassroots level.

<sup>67</sup> [https://portal.pnd.gog.pk/Content/Files/Reports/GBDS%202022\\_243806233.pdf](https://portal.pnd.gog.pk/Content/Files/Reports/GBDS%202022_243806233.pdf)

ADMINISTRATIVE SETUP				
SERIAL NO.	CATEGORY	1998	2017	2022
1	DIVISIONS	01	03	03
2	DISTRICTS	05	10	10
3	SUB-DIVISIONS	12	19	23
4	TEHSILS	19	31	36
5	POLICE STATIONS	60	65	66
6	PRISONS (JAILS) IN GB	05	06	6
7	TOTAL CAPACITY OF JAILS IN GB	500	690	739

**Figure:20 – Administrative Setups of GB**

## 2. Demography of GB

- Population.** 1.8 Mn, with 50.8% males and 49% females.
- Population Growth.** Annual population growth rate – 2.8%.
- Population Density.** Population density is 20.6 people per square km.
- Languages.** Shina, Khowar, Balti, Burushaski, Domaaki, Ladakhi, Purgi and Wakhi.
- Ethnicities.** GB is divided into 8 x ethnic groups i.e. Baltis, Yashkunsm, Ladakhis, Turks, Kashmiris, Pathans, Moghals and Sheens.
- Unemployment rate.** 1.5%
- Emp Quota (Govt).** 1%
- Emp Quota (Army).** 2%
- HH ownership by %.** 90.8% (Figure:20)

Indicator	MICS 2017-18	CENCUS 2017	CBCLS 2018-19
% of ownership of house by households	89	90	90.81

**Figure:20 – HH Ownership in GB**

## 3. Health Infrastructure in Gilgit Baltistan

- 10 x DHQs
- 38 x Community Health Centers
- 37 x Civil Hospitals
- 22 x Basic Health Units (BHU)
- 134 x Family Welfare Centers
- 96 x MCH centers
- 62 x A class Dispensaries
- 242 x C class Dispensaries / first Aid Posts

- i. **3 x Rural Health Centers (RHC)**
- j. **173 x EPI Centers** (Expanded Program on Immunization)
- k. **46 x TB Centers**

#### 4. **Education in GB**

- a. **Literacy rate. 53%.** District-wise literacy rate and education infrastructure evolution is as under:-

DISTRICT WISE LITERACY RATE				Edn Evolution Since 1947 (Edn Dept GB)		
DISTRICT	MALE	FEMALE	TOTAL	Institutions	1947	2024
Hunza	80	65	71	Primary School	83	1116
Gilgit	78	57	67	Middle School	3	295
Nagar	78	57	66	High School	0	238
Ghizer	75	54	64	College	0	27
Astore	69	44	55	Universities	0	2
Skardu	67	41	54			
Kharmang	67	47	39			
Shigar	58	36	46			
Ghanche	56	34	43			
Diamer	50	11	29			
<b>GB</b>	<b>66</b>	<b>42</b>	<b>53</b>			

- b. **Enrollment rate. 94%**
- c. **Fed Govt Education Quota. 4%**
- d. **Education infrastructure**
  - 1) 1863+ Schools (incl primary, secondary and high schools)
  - 2) 27 x Colleges
  - 3) 6 x Specialized Institutions
  - 4) 3 x Medical Colleges
  - 5) 2 x Universities

#### 5. **GB Energy Sector**

- a. **GB's Power Generation.** GB generates **96-126MW of electricity.**<sup>68</sup>

YEAR	UNIT	2010	2017	2019	2022
Power Houses	No	93	128	149	180
Installed Capacity	MW	80.12	145.934	184.55	280.5
Generating Capacity	S (MW)	65.9	121.06	113.65	126.3
	W(MW)	44.55	88.21	86.12	96.1
Elec Supply	%	90	99	99	99
Domestic Consumers	Domestic	110,578	163,271	163,271	180,120
Commercial Consumers	Commercial	17,496	29,168	29,168	40,650
Industrial Consumers	Industrial	3,794	4,547	4,547	4,671
Others	Street light, pump, etc	--	--	270	652
<b>TOTAL CONSUMERS</b>		<b>132,242</b>	<b>197,568</b>	<b>197,256</b>	<b>245,660</b>

<sup>68</sup>[https://portal.pnd.gog.pk/Content/Files/Reports/Gilgit%20Baltistan%20at%20a%20Glance%20New%20Design%202020%20Final\\_210554160.pdf?utm\\_source](https://portal.pnd.gog.pk/Content/Files/Reports/Gilgit%20Baltistan%20at%20a%20Glance%20New%20Design%202020%20Final_210554160.pdf?utm_source)

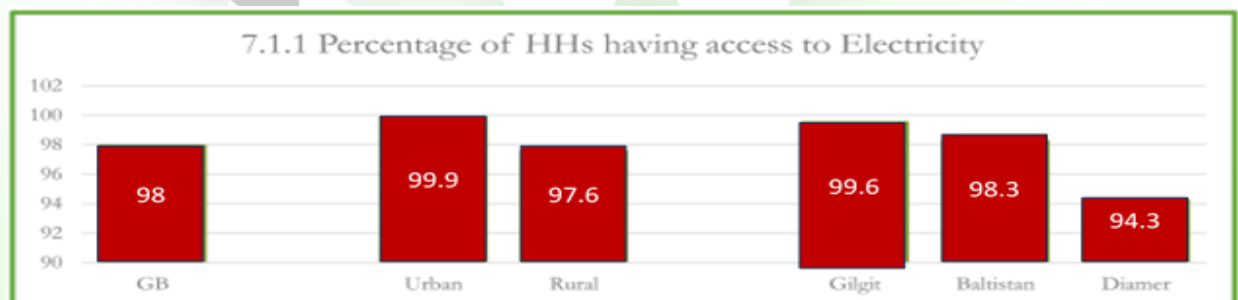
- b. **GB's Power Demand.** GB is using 254-453 MW of electricity. Electricity demand and Shortfall is as under: -

DISTRICTS	PRESENT DEMAND		PRESENT SHORTFALL	
	Summer (MW)	Winter (MW)	Summer (MW)	Winter (MW)
Ghizer	38.88	71.34	26.38	61.96
Chilas	36.02	50.43	25.43	39.59
Astore	14.83	24.53	10.33	20.53
Skardu	50.6	94.47	30.3	78.27
Shiger	10.35	19.36	6.85	17.36
Kharmang	6.65	12.54	2.04	8.47
Ghanche	25.5	48.52	17.41	43.36
<b>TOTAL</b>	<b>254.82</b>	<b>453.19</b>	<b>132.46</b>	<b>361.92</b>

1)

- c. **Households Having Electricity. 97.5%**

INDICATOR	MICS 2017-18	CENCUS 2017	CBCLS 2018-19
% HH having electricity	98	93.30	97.57



- d. **Federal Support**

- 1) 100 MW solar power project establishment plan (PSDP).
- 2) 100 MW KIU Hydropower (CPEC).

- e. **Water Resources and Dam Construction**

- 1) **The Attabad Lake Hydropower Project.** Generation capacity - 34.5 MW. (PSDP)
- 2) **Diamer-Basha Dam.** Generation capacity - 4,500 MW of electricity. (PSDP)

- 3) **Yulbo Hydropower Project.** Generation capacity - 2,800 MW, expected to be completed in 2027.

6. **Budget** (GoGB Annual Budget Statement placed at **Figure:21**)<sup>69</sup>

- a. **Development Budget**
- 1) **FY2026 Allocation.** Rs. 49 bn.
  - 2) **FY2025.** Rs. 34.5 bn.
  - 3) **FY2024.** Rs. 29.9 bn.
- b. **Non-Development Budget**
- 1) **FY2026 Allocation.** Rs. 261 bn.
  - 2) **FY2025.** Rs. 86.6 bn.
  - 3) **FY2024.** Rs. 64 bn.
- c. **Wheat Subsidy**
- 1) **FY2025.** Rs. 19 bn.
  - 2) **FY2024.** Rs. 14.8 bn.
  - 3) **Wheat Production (Ton).** 26666.
  - 4) **Wheat Demand (Ton).** 180,000.

BUDGET SOURCE	BUDGET ESTIMATES 2023-2024	REVISED ESTIMATES 2023-2024	BUDGET ESTIMATES 2024-2025
Non-Development Budget	74,000,000,000	64,044,564,000	86,600,000,000
Development Budget	28,450,000,000	29,941,520,000	34,500,000,000
Wheat Subsidy	13,700,000,000	14,807,315,000	19,072,000,000
<b>Grand Total</b>	<b>116,150,000,000</b>	<b>108,793,399,000</b>	<b>140,172,000,000</b>

**Figure:21 – GB's Annual Budget**

7. **Agriculture**

- a. **Cultivated land.** 3938 Km<sup>2</sup>
- b. **Cultivable Waste.** 3044 Km<sup>2</sup>
- c. Details are as under: -

AGRI STATISTICS							
Area	Geographical Area	Cultivated Area	Cropped Area	Cultivable Waste	Total Farm Families	Total Farm Population	Average Farm Size
Unit	Sq Km	Sq Km	Sq Km	Sq Km	Nos	Nos	Nos
Area	72,496	3,938.784	839.95	3,044.832	162,500	910,00	0.6-0.8

<sup>69</sup> <https://gilgitbaltistan.gov.pk/storage/downloads/Volume%20I%20ABS%202024-2025.pdf>

8. **Mines and Minerals. 11218 ton granite, 6500 ton pozzolan and 1874 ton copper produced since 2016.** Details are as under: -

MINERALS PRODUCTION IN TONS IN RESPECT OF DPT. OF MINES AND MINERALS GB								
Minerals	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	Total (Tons)
Marble	100	420	320	190	200	180	210	1620
Granite	400	1770	1150	480	760	2878	3780	11218
Nephrite	0	0	0	0	0	60	12	72
Potash	0	0	0	0	0	160	0	160
Iron Ore	0	0	0	0	0	3	0	3
Antimony	0	0	0	0	0	53	23	76
Mica	226	380	215	458	214	120	240	1853
Lead	40	0	0	0	0	0	0	40
Pozzolan	0	0	0	0	0	1000	5500	6500
Copper	0	0	150	240	90	740	654	1874
Placer Gold	85	12	0	0	11	0	40	148
Gold Rock	0	0	42	80	112	80	210	524
Precious Stones	0	0	74	8	11	47	25	165
Semi-Precious	0	0	42	53	11	0	147	253
Bravel	0	0	0	0	0	1	0	1

9. **Roads**

- a. **Metal Roads. 2677 Km**
- b. **Shingle Roads. 5813 Km**
- c. **Road Density. 12 km/100km<sup>2</sup>** (Details attached at **Figure:22**)

10. **NCP Vehicles. 37979** (**Figure:23**)

11. **Telecom Network** (**Figure:24**)

- a. **Mobile Telephone Penetration. 86.17%** (SRC P&DD GB)
- b. **Global System of Mobile (GSM) Sites. 302**
- c. **Number of DSL sites. 65**

12. **Existing industries in GB. 991** (**Figure:25**)

13. **Development Projects in GB**

a. **Completed Projects**

- 1) Naltar Expressway
- 2) Engineering Block at Karakoram International University.
- 3) Baltistan University, Skardu.

b. **Ongoing Projects**

- 4) Regional Grid Station
- 5) Upgradation and Widening of Jaglot - Skardu Road (S-1, 167 km)

c. **PSDP Projects (On-going)**

1) **Energy Projects**

- a) 26MW Shagharthang Hydropower Project, Skardu.
- b) Construction of 30 MW Hydro Power Project Ghowari, Ghanche. Construction of 16 MW Hydro Power Project Naltar-III.
- c) 20 MW HPP Hanzel Gilgit.
- d) Construction of 4 MW Hydropower Project Thack Chilas.
- e) 1 MW Hydropower Project, Batogah (Phase-IV), Chilas.
- f) Construction of 2 MW Hydro Power Project, Raikote Muthat Chilas.
- g) Upgrading 160 KW Hydro Power Station Tangir to 2 MW.
- h) Installation of a 2 MW Solar PV Plant in Skardu.
- i) Construction of 2 MW Hydro Power Project Ishkoman Phase-II, Ghizer.
- j) Establishment of Regional Grid, Gilgit Baltistan Phase-I.

2) **Infrastructure / Other Projects**

- a) Construction of Darel and Tangir Expressway along with roads in Khanbury and Buner.
- b) Construction of Road from Pissan to Hoper Nagar (Shahra-e-Nagar) 40 Km.
- c) Construction of Shandur-Gilgit Road 216 Km.
- d) Inter-Provincial Connectivity Economic Corridor Through GB and AJ&K (Thalichi GB-Shounter AJ&K).
- e) Inter-Regional Connectivity Between Baltistan Division and Diamer-Astore Division (Construction / Metalling of Road from Gorikote Astore to Shagharthang Skardu).
- f) Establishment of 250 x Bed Hospital at Skardu.
- g) Establishment of 50 x Bedded Cardiac Hospital Phase-I at Gilgit.
- h) Establishment of Medical and Nursing College at Gilgit.
- i) Establishment of 300 x Bed ICT Hospital, Mother & Child Hospital in Chilas (New Scheme).

- j) Up-gradation of Provincial HQ Hospital Gilgit based on Master Plan.
- k) Establishment of 10 x Model Schools in Gilgit Baltistan (One in each District).
- l) Greater Water Supply Hunza.
- m) Sewerage and Sanitary System for Gilgit City (Phase-II).

#### 14. CPEC projects

- b. Industrial Zone Minawar Gilgit.
- c. Gilgit KIU Hydropower, Installation capacity 100 MW.
- d. Moqpondas special economic zone.

Serial	Name of the Sector	2022	Unit
	Transport And Communication		
1	Metal Roads	5813.86	Km
2	Shingle Roads	5813.86	Km
3	Road Density	0.124	Km/Km2
		12.43	Km.100km2
4	Road Per 100 Population	5.25	Km/1000 Population
5	Bridges All Types	594	Nos
6	KKH in GB	516.00	Km

**Figure:22 – Road Infra (GB)**

Type of Vehicles	2017-18		2018-19		2019-20		2020-21		2021-22	
	Regular	NCP	Regular	NCP	Regular	NCP	Regular	NCP	Regular	NCP
Bus	250	0	360	0	375	0	398	0	455	0
Truck	9980	76	10786	89	10890	98	11678	98	11922	161
Jeep	2456	578	3467	789	3879	987	4010	1200	4418	1790
Motor Car	1765	14567	1876	17689	1987	18767	2010	20100	2340	21230
Oil Tanker	876	6	900	9	917	9	945	12	10010	15
Tractor	1234	0	1567	0	1786	0	1987	0	2678	0
Coaster	14	0	16	0	17	0	19	1	25	0
Hiace	654	765	769	897	876	987	898	1123	910	1315
Motor Cycle	7678	6	8765	8	9877	8	10234	9	10897	12
Other	2345	789	2678	987	2786	1123	3123	1234	3916	13456
<b>Total</b>	<b>27252</b>	<b>16787</b>	<b>31184</b>	<b>20467</b>	<b>33390</b>	<b>21979</b>	<b>35302</b>	<b>23777</b>	<b>47571</b>	<b>37979</b>

**Figure:23 – Number of Registered / NCP Vehicles**

Telecommunication (Phone Network)	
Base Transceiver Station (BTS) Site	302
Global System of Mobile (GSM) Sites	302
Code Division Multiple Access (CDMA) BTS Sites	12
No. of Telephone Exchange	43
Installed Capacity	36,168
Working Connection	11,736
No. of DSL sites	65
DSL Total Sites	8,272
DSL Working Connection	5,434

**Figure:24 – Telecom Network of GB**

Districts	Industries
Astore	16
Diamer	281
Ghizer	178
Gilgit	313
Hunza	72
Nagar	16
Shigar	21
Skardu	52
Ghanche	30
Kharmang	12
<b>Total</b>	<b>991</b>

**Figure:25 – Existing Industries in GB**

## 15. GB – Imp Realities

### a. Constitutional status of GB

- 1) The constitutional status of GB remains intricately  **tied to the broader Kashmir issue**, as outlined in UN resolutions and Pakistan’s unwavering stance on Kashmir. No claims by enemy forces hold any significance over the reality that GB, which is a part of Pakistan.
- 2) Over the years, Pakistan has made **significant strides in introducing pol and legal reforms in GB**, such as the abolition of the Frontier Crimes Regulation (FCR) in 1970 and the enactment of the GB Self-empowerment and Governance Order in 2009.
- 3) The **GB Empowerment and Self-Governance Order of 2009** marked a pivotal step in granting the region a governance framework akin to Pakistan’s provinces. A 33-seated assembly was established, known as the GB Legislative Assembly, empowered to elect its CM. According to the Order, the region was granted its own governor, election commission, and supreme appellate court.
- 4) The region enjoys a series of incentives, including subsidies on wheat and electricity, tax exemptions, and various other developmental initiatives, reflecting the federal government’s ongoing efforts to foster economic well-being and governance in GB.

### b. Green Tourism

- 1) GB has been named in the World’s top 25 destinations to visit in 2025 by CNN travel.

- 2) According to Tourism department of GB, **986,000 domestic tourists and 16,500 international travelers** visited the region in 2024.
- 3) Current pub opinion in GB is adverse due to **neg propaganda and misperception / lack of information**.
- 4) **GoGB itself requested lease of 72 x tourist facilitation centers/rest houses**, mostly owned by GoGB forest and agriculture dept.
- 5) Out of total revenue generated, **GoGB will get 55% share in term of rent and local development, 20% revenue will go to Tourism development fund**.
- 6) Green tourism is a society driven initiative which can bring prosperity in area and create jobs for locals.

b. **Electricity Situation in GB in Winters**

- 1) The issue of power outages in winter is related to GB's **over reliance on hydropower**. In the winter, the **reduced flow of water due to freezing rivers and streams** hampers the generation capacity of hydropower plants, thereby disrupting the energy supply.
- 2) There are **180 x power houses in GB**. The installed **capacity of these power houses is 280.5 MW**. However, **power generation is 126.3 MW during the summer while 96.1 MW during the winter** due to the low flow of water (GB power department).
- 3) The establishment of **GB's regional grid** has been significantly delayed due to mismanagement and procedural violations. Initially approved in October 2019 at Rs 4.959 bn, the project saw no tendering for two years. When bids were finally invited in October 2021, 14 firms purchased bidding documents, but only three attended the pre-bid meeting due to poor communication, and just two submitted bids. Both bidders lacked the required expertise, and despite the Central Development Working Party (CDWP) advising in August 2022 to rebid and address procedural flaws, this was ignored. Instead, the project cost was revised to Rs 17 bn, driven partly by the delays. Transparency International flagged these violations, emphasizing the need for re-tendering, while the Planning Commission also identified serious lapses. Consequently, the project has been suspended, with the GB govt now seeking a review. These

delays, mismanagement, and favoritism have escalated costs and stalled essential infrastructure for the region.

- 4) **Potential to produce approx. 60,000 MW** of hydro-elec. GoGB unable to realize the potential due to ill planning, corruption and lack of pol will.
- 5) **4 x power projects are currently under pipeline which would add 176 MW to the system.**
- 6) **26 MW Shagarthang Skardu HPP** (work in progress, likely completion 2030).
- 7) **34 MW Hurpo HPP** (survey completed, bidding & land acquisition in process, likely completion 2028).
- 8) **30 MW Gwari HPP** (survey completed, bidding in process, likely completion 2030).
- 9) **54 MW Atta Abad Hunza** (feasibility study in progress).
- 10) **Upgradation of 20 MW Henzal HPP to 40 MW.**
- 11) DBD and other power projects in GB would certainly address the issue.
- 12) **116 MW Solar Power Project** recently announced by PM.

b. **Wheat Quota in GB**

- 1) **GoP has been providing subsidy on wheat since 1971.**
- 2) In 1999, **Gen Musharaf fixed Rs 2 bn for wheat subsidy which was gradually increased by succeeding Govts.**
- 3) **Wheat subsidy worth 14.8 bn** was allocated in FY 2024 and subsidy worth Rs. **19 bn has been allocated for FY 2025.**
- 4) **6 x Kg wheat / flour per individual per month** is being given on subsidized rate.
- 5) Only people of GB / AJ&K are getting subsidy on wheat, electricity and tax exemption.
- 6) The **GoGB has intro a digitized Wheat distribution system** to enhance transparency and efficiency.
- 7) The Provincial government has also **discontinued receiving wheat imported from Ukraine due to quality concerns.**
- 8) Currently, only **1.8% of GB's 72,496 square kilometers of land is under cultivation**, which, if amply used can alleviate the region's grievances regarding the staple.

b. **FWO and NLC Role in Const / Other Development Projects**

- 1) The **awarding of projects follows a fair bidding process which is open to all public and private entities**. Mostly international companies do not operate in such terrain as the profit margin is less, regardless of the profit's dev is essential and is being carried out in the area.
- 2) Border Roads Org (BRO) in India performs the same task like FWO.
- 3) **Jaglot – Skardu Road is present on seismic plates earthquake fault line area, even construction of tunnel cannot stop land sliding.**
- 4) Furthermore, **FWO is construction a shelter in landsliding area.**
- 5) Efforts for construction of tunnels at the desired spots are under consideration.
- 6) **No toll plazas have yet been construction in the area.**

b. **SCO's Role in Providing Communication in GB**

- 1) **SCO operates on a no-profit, no-loss basis**, focusing on improving connectivity in challenging terrains. Internet connectivity / speed is linked to terrain challenges and power outages.
- 2) **All tele companies have acquired licenses to operate in GB. There is no bar for any operator to provide services.** These tele companies have **182 x BTS towers** (Telenor: 56, Zong: 76, Jazz: 31, Ufone: 19) while **SCO has 304 x towers** in GB.
- 3) SCO **offers lowest mob tariffs**. In mainland, **service providers (Nayatel, PTCL, Storm Fiber) have provided services in 20 x major cities only.**
- 4) SCO is **operating 5 x large scale Software Technology Parks (STPs)** and **25 x small Freelancing Hubs (FLHs)** all over GB.
- 5) GB has 100% telecom density.

b. **Opportunities for Youth at National Level**

- 1) SCO is **established free-lancing hubs and IT Parks** for better opportunities for youth in GB.
- 2) Spec focus is being directed towards generating **maximum jobs in tourism industry.**
- 3) **International flights have commenced their operations in Skardu,** opening up new opportunities for youth in the region.

- 4) Scholarships and reserved quotas for students from GB have been introduced in prominent universities across Pakistan.
- 5) Efforts are underway to construct Medical College in GB. In this regard piece of land has also been identified.
- 6) **Feasibility study for AMC in GB is under process.**
- 7) KIU already established Engr collage.

b. **Land Status / Reforms in GB**

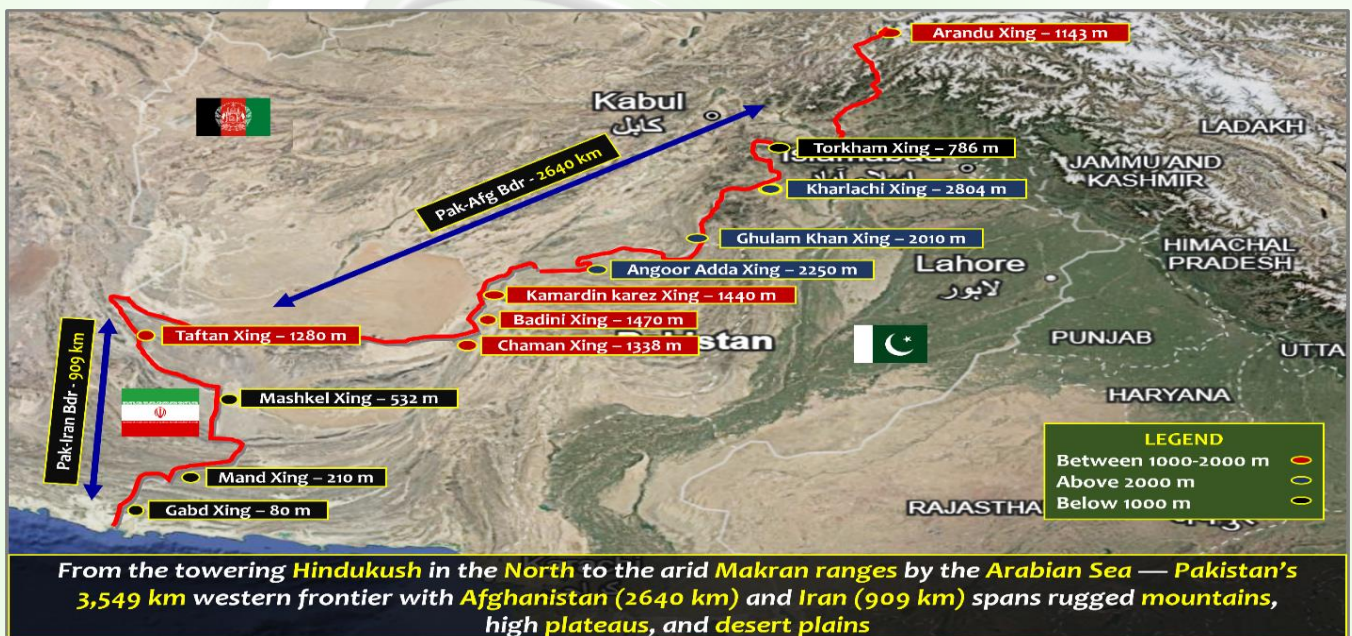
- 1) Currently the GoGB is seriously working on Land reforms in collaboration with local communities to respect traditional ownership.
- 2) Land reforms committee was established which has drafted **Land Reforms Act** for land settlements.
- 3) **20% land will be GoGB's land for welfare projects, whereas, 80% land will be distributed among communities.**
- 4) Baseless propaganda is being circulated regarding occupation of lands by Army.

b. **Royalty of Diamar Basha Dam (DBD)**

- 1) CM GB has taken up the case with Fed govt.
- 2) **PM has constituted a committee comprising of Federal Ministers, Minister KA&GB, Chairman BOI GB and Chief Secy GB to firm up recommendation to resolve the issue amicably.**

## WHY MORE TERRORIST INCIDENTS IN KP AND BALOCHISTAN

1. The Pakistan Army, intelligence agencies, police, and law enforcement agencies remain fully committed to eradicating terrorism, sustaining an unwavering operational tempo across the country.
2. Terrorism in **Balochistan and KP is directly linked to their border proximity with Afghanistan**, where militant elements continue to find safe havens. The relatively rugged and porous borders (**Figure:27**) between Afghanistan, Balochistan, and KP facilitate the **free movement of militants, weapons and resources**.
3. The situation is further complicated by fragile civil governance, weak policing, poor inter-agency coordination, politico-narco-crime nexus and pervasive corruption (especially in NMDs bordering Afghanistan) that undermine state control. In Balochistan, although some Category B areas have been upgraded to Category A in documentation, the on-ground situation remains unchanged and continues to correspond to Category B standards.



**Figure:27 – Pak-Afghan Border**

4. Instability in Afghanistan supports the development of robust logistical networks, which are used by extremist/ terrorist groups to coordinate, fund, and sustain their operations in Balochistan and KP. Currently, **more than 2 x dozen terrorist organizations (Figure:28) are operating from Afghanistan, 17 x of which are active against Pakistan.**<sup>70</sup> A UN Security Council report in July 2024 estimated that **at least 6,000 x Fitna Al Khwarij fighters currently operate out of Afghanistan.**

<sup>70</sup> UNSC Report <https://docs.un.org/en/S/2025/71>

Haqqani NW	Fitna-Al-Khwarij (TTP)	ISIS	LeJ	JeM
Jamat Ansar Ullah	Shura Ittehad Mujahideen	Amr Bil Maruf	Momin Group	Jamat u dawa
Lashkar e Islam	Maulvi Nazir Gp	Chechen Gp	TTT	Khatiba Imam al Bukhari
Islamic Jihad Grp	ETIP	ETIM	Hizb e Islami	BLA
LeT	AQIS	IMU	BRAS	BLF, BRG, Majeed Bde

**Figure:28 – Terrorist Organizations Operating from Afghanistan**

5. Implementation of **One Document Regime (ODR)** has also brought under control terrorism and the spectrum of illegal activities that sustain it. Illegal trade and smuggling on the Pak-Afghan and Pak-Iran borders cost bns of dollars to Pakistan's economy annually.

6. **Pakistan loses Rs. 8 trillion annually due to illegal trade**, with **major contributors being oil and tire smuggling**. Around **6 mn liters of Iranian oil enter Pakistan daily, costing Rs. 227 bn per year**, while 65% of imported tires come through illegal channels, causing a Rs. 70 bn loss. The smuggling proceeds are converted into dollars and sent abroad, fueling currency devaluation.

7. The existence of over **400,000 non-custom paid vehicles in KP** further enable **terrorism funding**, as was evident in **Dasu suicide bombing**.

8. Unregulated funding of Pakistan's **32,000 madrassas, with only 51.9% registered, is also a factor fueling extremism** and radicalization.

9. **Efforts by Law Enforcement Agencies (LEAs)**

a. **2024**

- 1) Security forces and law enforcement agencies conducted **59,775 x counter-terrorism operations**, averaging **169 x operations daily** against terrorists and their facilitators.
- 2) **No of Operations conducted in Baluchistan in 2024 stands at 45761** (198% increased from no. of operations in 2023). 233 x terrorists were killed, 884 x suspects apprehended.
- 3) **No of Operations conducted in KP in 2024 stands at 14535**

(18% increased from no. of operations in 2023). 719 x Khwarijs killed (59% increased since 2023).

- 4) In the course of these operations, **392 x officers and soldiers** made the ultimate sacrifice, laying down their lives in defence of the nation.

b. **2025 (till 28 Oct 2025)**

1)	Total terrorist incidents	-	4387
2)	No of Operations conducted	-	62113
3)	Terrorists killed	-	1667
4)	Own casualties	-	3447 (incl 1000 shaheed; 2300 injured)

10. Despite military successes, local administrations in KP and Balochistan refuse to take control and the **Counter-Terrorism Department** is critically **understaffed**. For instance, **CTD KP has only 3200 personnel**.

11. Moreover, these provinces have the **fewest Anti-Terrorism Courts**, with **Punjab having 23, Sindh 32, KP only 13, and Balochistan a mere 9**. As a result, the judicial system is overwhelmed, leading to significant delays in addressing terrorism cases.

12. Out of **605 pending terrorism cases**, **Punjab accounts for 48, Sindh for 115, KP for 196, and Balochistan for 208**. This backlog results in delayed justice, emboldening terrorists.

13. While the Army fights terrorists, it is imperative that the **entire nation remains united in combating terrorism as a whole**.

## **MILITARY OPERATIONS - MINERAL RICH AREAS**

1. The assertion that Pakistan's military operations are driven by mineral interests primarily originates from separatist narratives and politically motivated discourse.
2. **Mineral-rich areas, mainly in Balochistan and parts of KP, are security-sensitive zones, proximate with terrorist's safe haven** i.e. Afghanistan (for detailed reason for terrorism in KP and Balochistan: Refer Page 53: *Why More Terrorist Incidents in KP and Balochistan*), which **necessitates the presence of Army to secure national assets, protect ongoing projects** (like Saindak, Reko Diq, and Gwadar Port) and **stabilize the local environment to enable economic activity**. Moreover, the Army's deployment contributes to ensuring security and operational reliability for foreign investors, particularly those from China.
3. It is pertinent to mention that **Pakistan possesses substantial mineral reserves across multiple provinces in addition to reserves in KP and Balochistan** - copper, gold, and iron in Punjab; vast coal deposits in Sindh's Thar region; and significant rare-earth elements in GB (for province wise details of major mineral deposits refer Page: 95 *Mineral Resources in Pakistan*), yet these areas have not witnessed comparable military operations due to their relative stability.

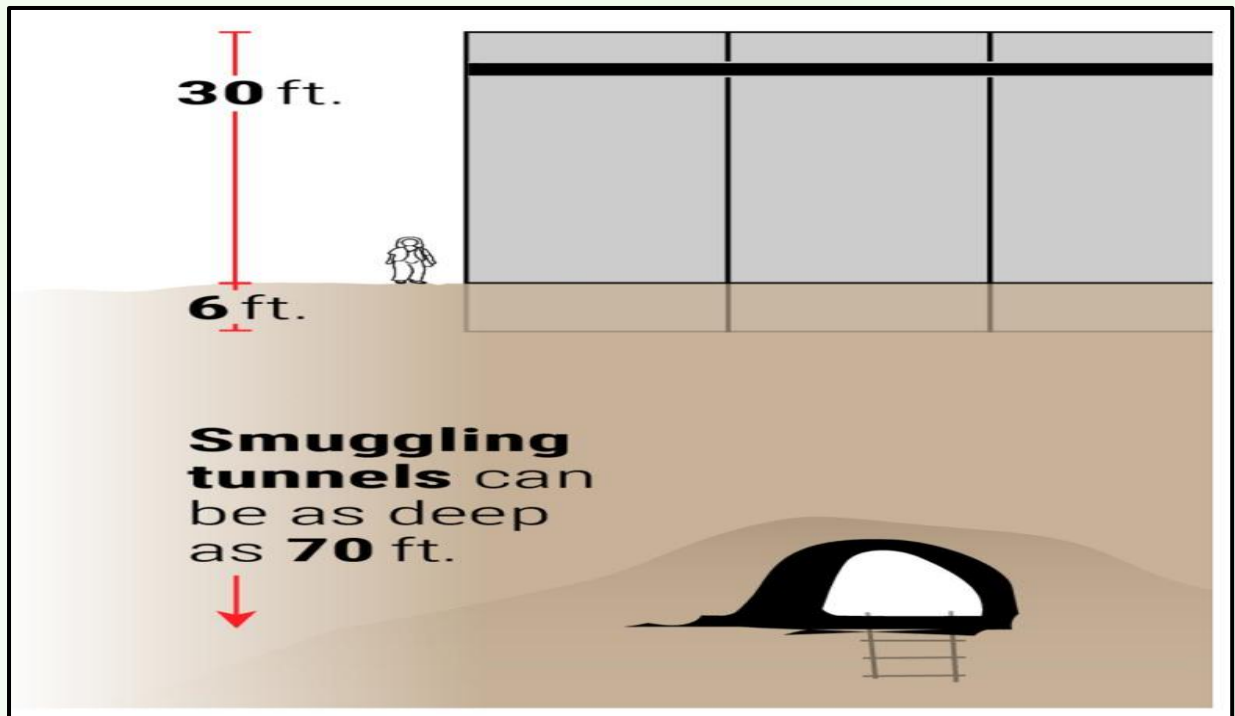
## **COUNTER TERRORISM MEASURES - BORDER FENCING AND TROOPS DEPLOYMENT**

### **FOR CONTROL CROSS BORDER TERRORISTS' MOVEMENT**

1. Terrorism and smuggling persist largely due to the enduring challenge of illegal cross-border movement, which enables terrorist incursions from safe havens and facilitates smuggling activities.
2. The challenge of cross-border movement is exacerbated by the tribal demographics of the frontier region, where shared kinship, ethnic and cultural ties across the Pak-Afghan border complicate border management, blur legal boundaries and inadvertently provide cover for illicit transit and terrorist infiltration.
3. The social dynamics of these areas, shaped by the tribal code of honour, particularly the principle of *Nanawatai*, which entails granting refuge and protection to anyone seeking it (including sworn enemies), further complicate counterterrorism efforts as terrorists often exploit this custom to obtain shelter within local communities.
4. Furthermore, the geographic isolation of Balochistan and KP, characterized by mountainous and inhospitable terrain as well as widely dispersed populations, severely constrains governmental access, impedes the establishment of administrative and security infrastructure, and hinders effective governance across the region, thereby contributing to lower educational attainment and slower socio-economic progress, which in turn render these communities more susceptible to exploitation and radical influence.
5. Also, despite the deployment of the Army and the erection of border fences, the inherent limitations of such measures mean that no border can ever be rendered completely impermeable - a reality exemplified by the US-Mexico border situation (**US Mexico Border: 3145 Kms; Trump Wall – 727 Kms; \$ 21.6 bn**). Despite the installation of trump wall, the illegal crossings could not be contained, as illegal activities continued through underground tunnels as deep as 70 ft (**Figure:28**).
6. Furthermore, effective border management requires mutual cooperation from both sides; however, on **Pak-Afghan border 1,452 x check posts** are present on Pakistani side, whereas only **267 x check posts** are present on Afghan side. Evidence also suggests that the **Afghan authorities have been involved in facilitating illegal movement across the border**. Despite lack of cooperation from Afghanistan side, the border management efforts from Pakistan have shown a **5% decrement in the number of cross border incidents along Afghanistan-KP border**.

7. The presence of a significant number of both registered and illegal Afghan refugees in Pakistan adds another layer of complexity to the issue, necessitating robust repatriation policies and the implementation of a unified document regime to regulate border crossings.

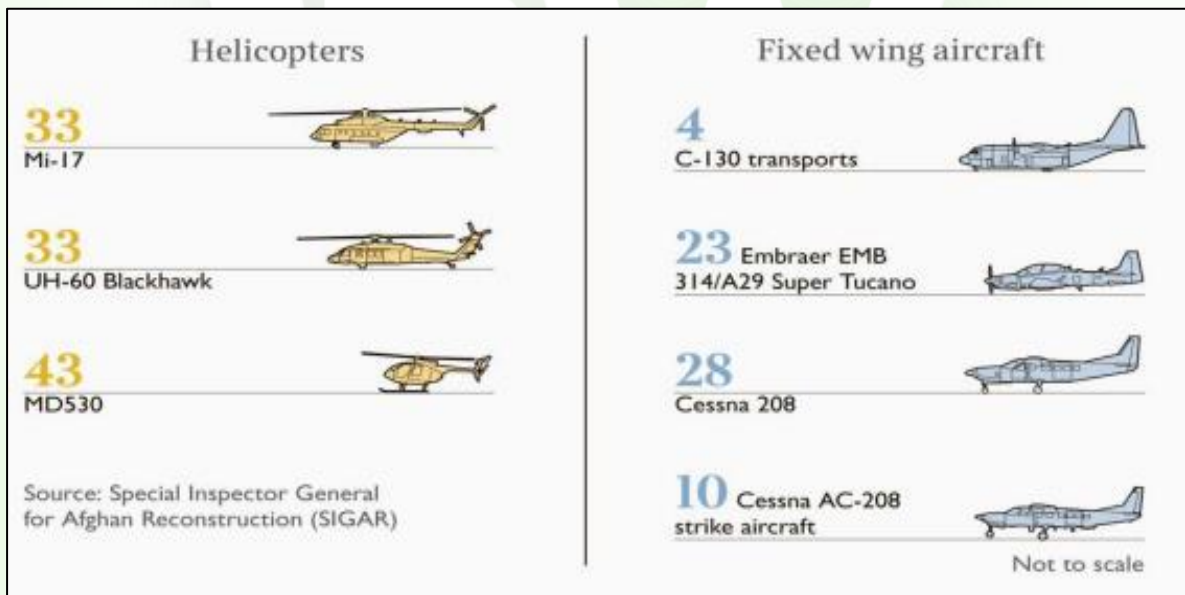
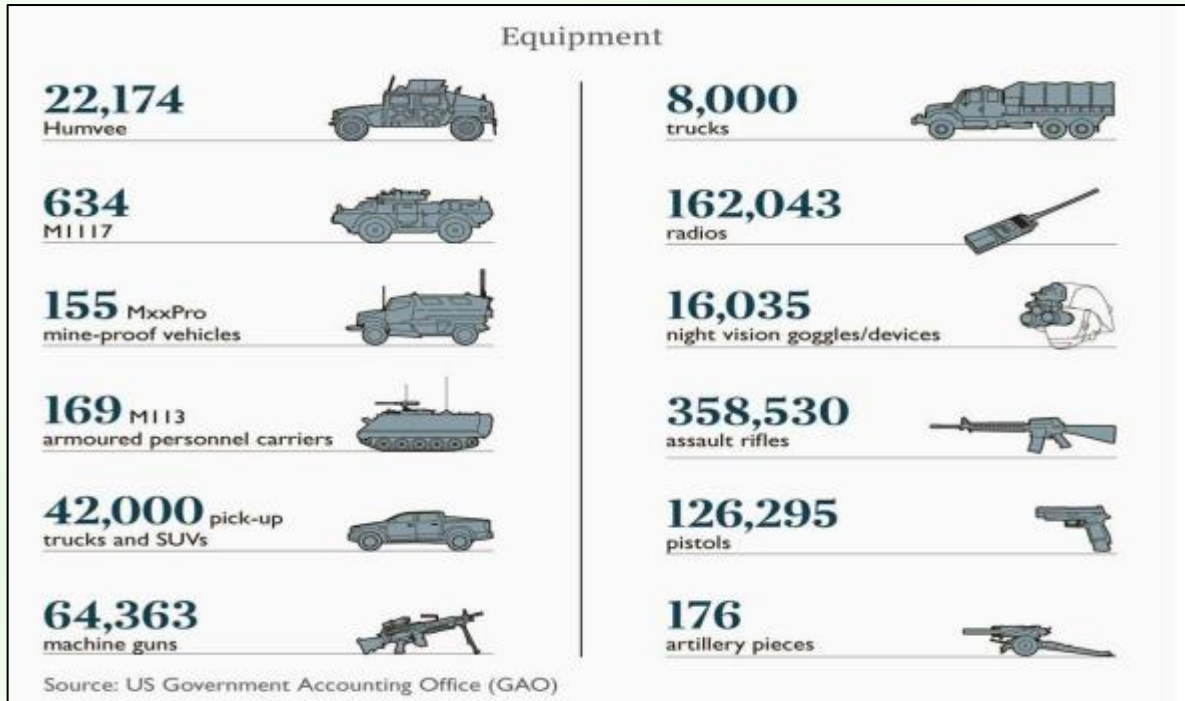
8. For the effective management of these challenges the government is working on enhanced coordination among agencies like the FIA, FC, Customs, and Levies, installation of advanced technical scanning systems and the establishment of Land Port Authority to streamline operations.



**Figure:28 – Trump Wall; US-Mexico Border**

## US WEAPONS IN AFGHANISTAN

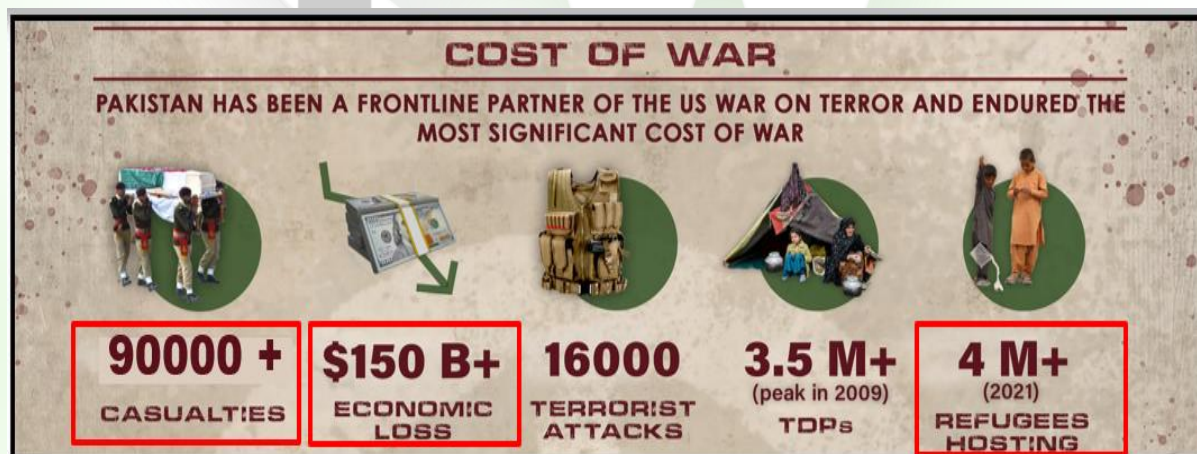
1. According to U.S. reports, **roughly \$7.1 bn worth of defence articles** and equipment (including an estimated 22,174 Humvees, nearly 1,000 armored vehicles, 64,363 machine guns, 42,000 trucks/SUVs, 358,530 assault rifles, 126,295 pistols, and nearly 200 artillery units – *Times of London*) remained in the country when the Taliban took over (**Figure:29**).
2. **Pakistan's security forces have observed and intercepted Tehrik-i-Taliban Pakistan (TTP) fighters operating along the Pak – Afghan border equipped with US-supplied weapons and advanced night-vision** devices abandoned in Afghan stockpiles.
3. Field reports and investigations, including those by Afghan Peace Watch, have documented **TTP assault elements carrying M4 rifles, M249 machine guns, and thermal sights**, often inscribed with markings such as “Property of U.S. Government,” during attacks on Pakistani border posts.
4. Pakistani authorities have noted that the incorporation of such modern small arms and optics has significantly enhanced the tactical capacity and operational sophistication of militant incursions.
5. More recently, a TTP-released video surfaced, showing its **cadres receiving training on the use of US-made shoulder-fired Javelin missiles**, a highly advanced system renowned for its ability to lock onto targets and autonomously guide itself to impact.
6. Rick Novak's *Washington Post* report underscores this trend by **tracing 63 weapons used in a train attack in Balochistan** (2025), that killed 21 people, **directly to NATO stockpiles abandoned in Afghanistan**, with **identification numbers confirming their transfer from the ANDSF to terrorist groups active against Pakistan**.
7. Beyond Pakistan, **Tajik border officials have also reported the interception of smuggled consignments of heavy weaponry**, including rocket launchers, traced back to Afghanistan.
8. UN monitoring teams corroborate these accounts, underscoring that Afghan-origin U.S. weaponry continues to surface across Central Asia and cautioning that jihadist elements may exploit this proliferation to destabilize the wider region.
9. The Ministry of Foreign Affairs in Pakistan has also issued an official statement, urging the de facto authorities in Kabul to take all necessary measures to prevent such weaponry from falling into the hands of terrorist groups. Pakistan has also provided ‘sufficient proof’ to Afghan Taliban that militants were using US-left weapons for cross-border terrorism.



**Figure:29 – Equipment Left by US in Afghanistan (August 2021)**

## NATION'S CONTRIBUTION IN WAR ON TERROR

1. **Sacrifices.** 91,699x nationwide casualties including 27,763x Shaheed and 63,936x injured.
2. **Area Cleared.** 46,978 sq kms. All terrorist training centers and bases were destroyed/ dismantled.
3. **Land Mines.** 59x shaheeds including Armed Forces personals and 541x injured which including 50% Armed Forces personals. 82 sq kms area has been cleared so far. All civilian casualties due to unexploded ordinance are provided compensation as per SOPs.
4. **Displacement.** 0.86 Mn families were displaced due to operations. 99% families have been rehabilitated and re-settled.
5. **Damage Houses.** As per initial survey of 2015, compensation for 105,744 houses was paid and an amount of Rs 32.99 bn was released to 100% affectees. Later in Mar 22, estimate was revised and 127,639 additional houses were included. Procedure of survey and compensation is in progress by the Govt Departments.
6. **Reference:** - (Figure:30)



**Figure:30 – Nation's Contribution in War on Terror**

## PAKISTAN'S POLICY ON AFGHANISTAN (FRIEND OR FOE?)

1. Pakistan has always sought to maintain brotherly relations with Afghanistan. Following the Afghan Taliban's 2021 takeover, Pakistan extended humanitarian assistance, facilitated trade access and urged the international community to unfreeze Afghanistan's financial assets to prevent economic collapse and avert a large-scale humanitarian crisis.
2. Despite Pakistan's efforts for peace, including its role in the Doha negotiations, Afghanistan's failure to counter "**Fitna al Khawarij**" (FAK) and "**Fitna al Hindustan**" (FAH) terrorist groups, in fact complicit support, has become a critical issue. FAK and FAH uses Afghan territory to launch attacks against Pakistan, and despite providing concrete evidence, multiple dossiers, 200+ ISI memos, 170+ demarches, more than 800 x protests filed at consulate general Kabul and more than 200 x border flag meetings, no significant action has been taken by the Afghan Taliban Regime against the group.
3. Notably, terrorism in Pakistan saw a significant uptick following Afghan Taliban takeover of Kabul from 572 terrorist incidents in 2021, to 3014 in 2024 and 4217 in 2025. **In 2024 alone, 27 x Afghans were amongst the terrorists killed by Law Enforcement Agencies.**
4. However, in the interest of national security and regional peace, certain measures are being undertaken that are in full compliance with the constitution and international law.
5. Pakistan will **defend itself against any external and internal threats**, irrespective of their source, without compromising its sovereignty.
6. Pakistan has hosted **over 4 mn Afghan refugees** for more than four decades, a remarkable act of humanitarianism with minimal international assistance, as acknowledged by UN Secretary-General António Guterres. With the end of war in Afghanistan, Pakistan is now facilitating the dignified return of these refugees, which has been expedited in the ongoing year.
7. As far as **One Document Regime** (passport) is concerned, it has been designed to combat border smuggling and terrorism, adhering to internationally recognized standards. While it has faced criticism for being overly stringent, it aligns with the international protocols, as well as the protocols that Afghanistan observes with other nations.

## **PALESTINE (CONTRIBUTIONS OF PAKISTAN)**

1. Pakistan's position on Palestine, particularly regarding Gaza, is unequivocal and transparent. The country has consistently condemned the atrocities in Gaza in the strongest possible terms, both at the state and international levels. **The Prime Minister, the Ministry of Foreign Affairs, and the Army Chief have repeatedly condemned Israeli aggression and genocide** through various channels, including meetings with Palestinian diplomats, the Imam of Kaaba, and senior officials. Pakistan has been one of the first nations to extend immediate aid to Palestine.
2. The **Army Chief has repeatedly stated** that "**the Palestinian people have the full diplomatic, moral, and political support of the Pakistani nation, and we will continue to support their principled stance on the permanent resolution of the Palestinian issue, the liberation of their land, and the end of illegal occupation of Muslim holy sites.**"
3. In addition to diplomatic support, Pakistan continues to provide humanitarian assistance to the oppressed people of Palestine through the **National Disaster Management Authority (NDMA)** and the associated authorities.
4. Moreover, Pakistan Army regularly provides training to Palestinians at the Pakistan Military Academy (PMA) to enhance the skills and capabilities of Palestinian forces in various aspects of military operations. Thus far, **162 x Palestinian cadets have undergone training with the Pakistan Army**, reflecting Pakistan's enduring commitment to capacity-building of Palestinian defence forces.

## **5. Islamabad's Position on the US-Proposed Gaza Peace Framework**

- a. The 20-point Gaza Peace Plan announced by U.S. President Donald Trump was not Pakistan's draft but a modified version of a joint proposal by eight Muslim nations, including Jordan, UAE, Indonesia, Türkiye, Saudi Arabia, Qatar, Egypt, and Pakistan.
- b. The joint draft was prepared and discussed on the sidelines of the 80th UN General Assembly session, aiming to secure an immediate ceasefire in Gaza.
- c. Pakistan and other Muslim states submitted amendments to the US proposal, however, several of these were overlooked in the final version released by Washington. Despite reservations, the countries collectively endorsed the plan to prevent further bloodshed in Gaza.

## 6. Pakistan's Consistent Position on Palestine: From Quaid's Vision to the Two-State Policy

- a. Pakistan's present stance in favor of a two-state solution - with pre-1967 borders and Al-Quds Al-Sharif (Jerusalem) as the capital of a sovereign Palestinian state - is not a departure from the vision articulated by Quaid-e-Azam Muhammad Ali Jinnah in 1947–48. Rather, it represents a continuation of his principle: Pakistan would stand by whatever solution the Arabs and Palestinians themselves deemed just and acceptable.
- b. When Quaid-e-Azam expressed full support for the Palestinian cause shortly after the creation of Pakistan, he rejected the unilateral imposition of a Zionist state against the will of the Arab population of Palestine. At that time, the Palestinian leadership and the Arab League demanded a single, democratic state in all of Palestine where Muslims, Christians, and Jews could coexist - hence Quaid supported that position out of respect for their collective will.
- c. With the passage of time, the ground realities changed. After decades of conflict and occupation, the Palestinian Liberation Organization (PLO) and the Arab League collectively endorsed the two-state formula through the Oslo Accords (1993) and subsequent Arab Peace Initiatives (2002). This framework envisions an independent State of Palestine alongside Israel, based on pre-1967 borders.
- d. In line with Quaid-e-Azam's foundational principle that Pakistan's policy must reflect the aspirations of the Palestinian people and the consensus of the Arab world, Pakistan's current stance fully supports the two-state solution endorsed by the Palestinians themselves.

## 2. A few points to ponder for those advocating for a military action in Palestine: -

- a. Does Pakistan have UN authorization to undertake any action in Palestine or against Israel?
- b. Have any neighboring states, directly affected by the conflict, formally invited Pakistan to participate and will provide bases and space for undertaking a military offensive operation?
- c. Have the authorities from Palestine issued any formal request to Pakistan for its intervention?
- d. Considering Pakistan's ongoing security challenges, ranging from terrorism along its Western border to strategic tensions with India in the east, is it feasible for Pakistan to engage on an additional front? Considering the present force

structure of Pakistan.

- e. Does Pakistan possess the logistical capacity to operate in a geographically disconnected theater, where supply lines would have to extend over long distances beyond its borders?



POLICY WIRE

## STRATEGIC MUTUAL DEFENCE AGREEMENT (SMDA)

1. Building upon the historic partnership spanning nearly eight decades between the Kingdom of Saudi Arabia (KSA) and Pakistan, and grounded in the bonds of brotherhood, Islamic solidarity, shared strategic interests, and longstanding defence cooperation, Pakistan and KSA have signed a ***Strategic Mutual Defence Agreement (SMDA)***.

### 2. **Salients of the Agreement**

- a. Any aggression against either country shall be considered an aggression against both.
- b. Cooperation in domains of joint military exercise, intelligence sharing, defence industry and training.
- c. Cooperation in counter terrorism, cross-border threats and defence technology transfer.
- d. Potential industrial cooperation in cybersecurity, drones, and space defence under Saudi Vision 2030.<sup>71</sup>

### 3. **History of KSA-Pakistan Defence Cooperation**<sup>72</sup>

- a. **1967 - Defence Cooperation Agreement.** Pakistan and Saudi Arabia signed their first formal military cooperation pact, laying the foundation for Pakistani troops' deployment in the Kingdom.
- b. **1970s – Pakistani Military Deployment.** Thousands of Pakistani troops were stationed in Saudi Arabia at Riyadh's request to strengthen its defence architecture. Pakistani pilots also flew Saudi fighter jets, significantly contributing to the modernization of the Royal Saudi Air Force.
- c. **1982 – Defence Protocol.** A wide-ranging defence cooperation protocol was signed, formalizing Pakistan's role in training Saudi military personnel and strengthening joint operational readiness.
- d. **1990–91 – Gulf War.** Pakistan deployed more than 11,000 troops, including air and ground forces, to defend Saudi territory and safeguard the holy sites of Makkah and Madinah during the First Gulf War.
- e. **2004 onwards – Al-Samsam Exercises.** Pakistan and Saudi Arabia initiated biennial counter-terrorism exercises, reflecting a joint focus on modern security

<sup>71</sup> <https://www.arabnews.pk/node/2615737>

<sup>72</sup> <https://fpcci.org.pk/wp-content/uploads/2025/09/A-New-Chapter-in-Regional-Security-An-Analysis-of-the-Pakistan-Saudi-Arabia-Strategic-Defense-Agreement.pdf>

threats.

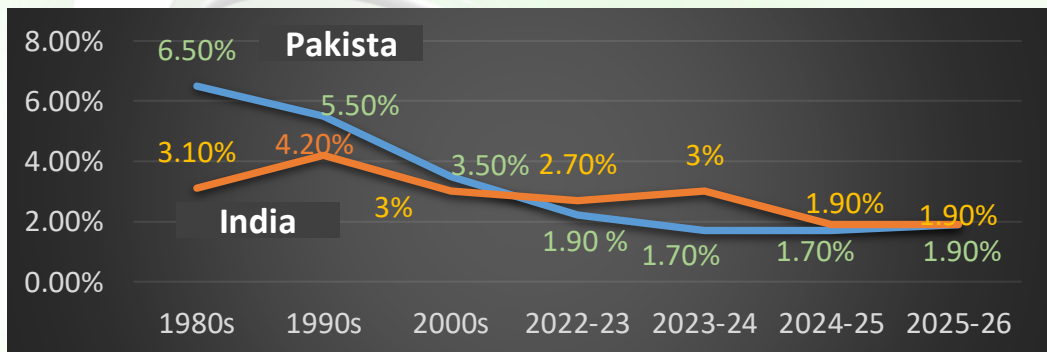
- f. **2016 – North Thunder Military Exercise**. Conducted in Hafr al-Batin, this was the largest multinational exercise in the region at the time, with Pakistan playing a frontline role alongside Saudi forces.
- g. **2018 – Islamic Military Counter Terrorism Coalition (IMCTC)**. Headquartered in Riyadh, this coalition appointed General (R) Raheel Sharif of Pakistan as its first Commander-in-Chief, reflecting Saudi trust in Pakistan's military leadership.

4. With the signature of the **historic agreement in September 2025**, adversarial elements are attempting to cast doubt on the agreement and its credibility by promoting self-conceived and unverified claims, **including the reported deployment of 25,000 troops, potential weapons transfers, the extension of Pakistan's nuclear umbrella to KSA, and a \$10 bn investment.**

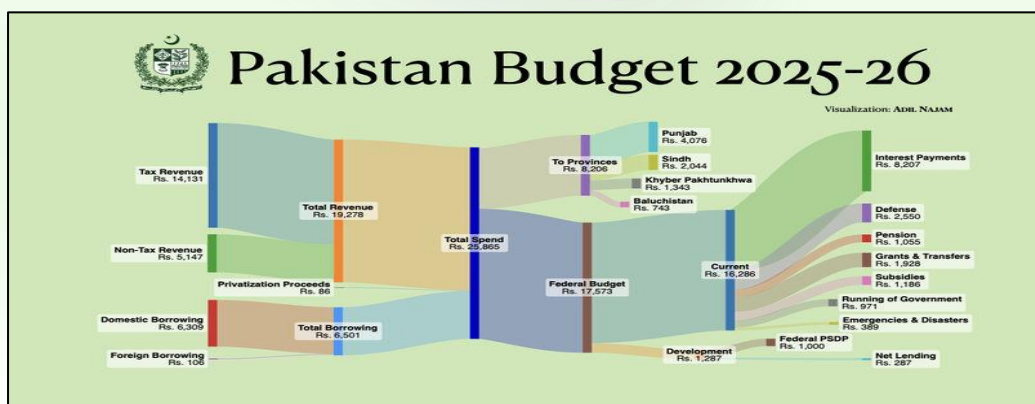


## DETAILS ON PAKISTAN ARMY BUDGET

1. Pakistan's defence budget has **steadily declined** over the years, from **6.5% of GDP in 1980s** to now standing at **1.9% of GDP** in the 2025-2026 budget. (**Figure:31**)
2. Pakistan's Defence Budget is **14.5%** of the Federal Budget in the year 2025-2026. (**Figure:32**)
3. Army Budget constitutes **45.5%** of the total Defence Budget in the year 2025-2026.
4. Globally, **Pakistan ranks 38th in military expenditure** yet maintains a **12th-place** on the Firepower Index, underscoring the Army's efficient resource management.
5. India, Pakistan's principal adversary, **ranks fourth globally in defence expenditure**. Although India allocated 1.9% of its GDP<sup>73</sup> to its defence budget - a seemingly modest percentage - it represents a substantial sum due to the vast scale of India's GDP. **In fact, India's defence budget surpasses Pakistan's by almost nine times.**



**Figure:31 – Comparison Pakistan & India Defence Budget**

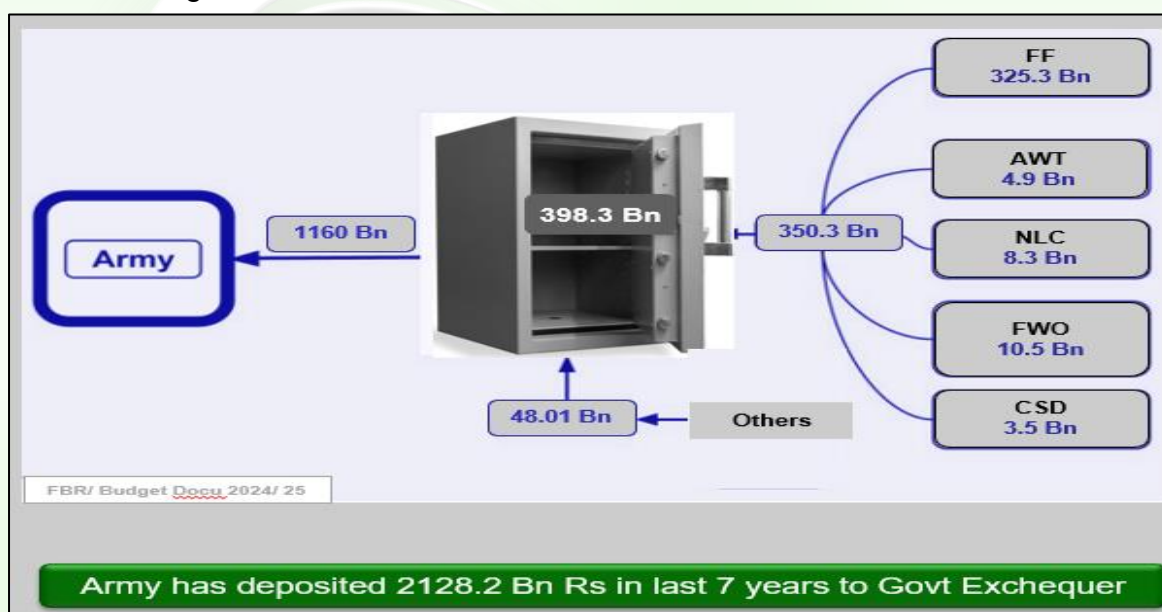


**Figure:32 –Pakistan Budget 2025-26**

<sup>73</sup> [https://www.globalfirepower.com/country-military-strength-detail.php?country\\_id=india](https://www.globalfirepower.com/country-military-strength-detail.php?country_id=india)

## PAKISTAN ARMY PERSONNEL ARE NOT EXEMPTED FROM PAYING TAXES

1. Like other government employees, Army officers and soldiers **pay income tax on their salaries**.
2. In 2024-25, the Army was allocated **1160 bn rupees budget**, while its contributions to the national exchequer amounted to **approximately 398.3 bn rupees**, or **34.3% of its allocated budget**. (**Figure:33**)
3. This includes **350.3 bn rupees** from its welfare organizations, such as the **Fauji Foundation (325.3 bn rupees)**, **Army Welfare Trust (4.9 bn rupees)**, and **NLC (8.3 bn rupees)**.
4. Moreover, the extensive range of services rendered by the Army in ensuring security in economic hubs such as Karachi, as well as its contributions to tasks like desilting and polio eradication, far outweigh the resources allocated to it.



**Figure:33 – Contributions of Pakistan Army to National Exchequer**

### FACTS RELATED TO DHAs

1. All DHAs are established through Act of Parliament.
2. **70%** of the employees, working for DHA, are civilians.
3. About **70% of benefits** are **for bereaved families of Shuhada, war wounded persons, ISD/ accidental deaths**, particularly for JCOs and Soldiers.
4. More than **90 %** of property, businesses and services in DHA are owned by civilians.
5. DHA plots are **free for Shuhada families only**.
6. DHA paid taxes worth **Rs 23.55 bn in FY 2022/23**.
7. **DHA and military-affiliated welfare institutions operate independently** of public funding, generating their own revenue, a model that **parallels similar entities in India, Malaysia, Australia, and Canada**. Well reputed firms regularly carry out audits of DHA to ensure transparency. Not even a single rupee from public money is spent on DHAs. All the allottees pay installments for housing schemes on monthly basis.
8. Moreover, numerous other **Pakistani government institutions**—such as **WAPDA, Railways, and Police** - also manage housing societies, yet only DHA is singled out for criticism.

## OVERVIEW OF FAUJI FOUNDATION (FF)

1. It is pertinent to mention that **83% of Fauji Foundation employees** are non-military personnel.
2. More than **73% of income** is spent on **wards of Shuhada, war wounded/ disabled soldiers and retired military persons**.
3. Annual contributions from Fauji Foundation amount to **Rs 10 bn** for **welfare activities (Education, Training, Health and Stipends)**.
4. Fauji Foundation is the **highest taxpayer**, contributing approximately **Rs 325.3 bn to national exchequer in yr 24/ 25**.
5. The **welfare of martyrs, veterans, and retired personnel** remains a **cornerstone of the Army's institutional framework**, ensuring their dignified sustenance through the Fauji Foundation's hospitals, schools, and welfare programs.
6. Such systems exist globally, relieving the state of a financial burden it is currently ill-equipped to bear.
7. Fauji Foundation's **last 7 years tax contribution** amounts to **Rs 1.6 trillion**.

## **ARMY'S ROLE IN NATION BUILDING**

1. Beyond military operations, the **Army fosters long-term stability in terrorism-affected regions by spearheading educational, healthcare, and employment initiatives** to address the root causes of extremism. In these areas Army's participation in development initiatives directly challenges entrenched illegal power structures that seek to perpetuate socio-economic stagnation for their own benefit.
2. Through initiatives such as the Special Investment Facilitation Council (SIFC) and its contributions to agriculture, IT, and disaster relief efforts, Pakistan Army actively aids in fortifying the state's economic resilience.
3. Before the establishment of Special Investment Facilitation Council (SIFC), securing a business license in Pakistan required **nearly three years due to bureaucratic delays**. By bringing stakeholders onto a single platform, SIFC has significantly expedited decision-making, reducing licensing time from 3-7 days, attracting investment **from China, Saudi Arabia, Türkiye, Azerbaijan and the UAE**.
4. The Army's facilitation role in SIFC, agriculture, and investment aligns entirely with the government's directives, leveraging its administrative expertise to support economic recovery.
5. In times of national crises - be it natural disasters, security threats, or economic downturns - the Army consistently emerges as the most reliable institution, steadfast in its commitment to the nation's well-being. The Army has been routinely deployed for de-silting operations and to provide security during polio vaccination campaigns.

**FAKE NEWS CONCERNING SENIOR ARMY OFFICERS**

1. There exists a widespread, yet unfounded notion that all retired Army Generals of Pakistan settle abroad. Contrary to this misconception, **every former Army Chief, except Gen Rahil Sharif**, who is residing in Kingdom of Saudi Arabia (KSA) and serving as the Commander-in- Chief of the Islamic Military Counter Terrorism Coalition (IMCTC) – a multinational alliance focused in combatting Terrorism, **is residing in Pakistan**.
2. The allegation that senior officers own islands abroad is another such entirely unfounded propaganda, rooted in disinformation, driven by malicious elements.



POLICY WIRE

## HOW ARMY IS DIFFERENT FROM OTHER ORGANIZATIONS

1. Pakistan Army is a highly professional institution, consistently maintaining and utilizing its military equipment. For instance, the **T-69 tanks from the 1960s and Cobra gunship helicopters from the 1980s** are still operational today due to their superior maintenance standards.
2. Despite receiving larger budgets than the military, other national institutions struggle with operational efficiency due to poor maintenance. A stark comparison can be drawn between district hospitals and CMHs, which fail to remain fully functional, unlike the military's equipment and infrastructure.
3. When **civilian institutions fall short of performance standards, they often resort to social media to deflect blame**. By associating their failures with public discontent, they attempt to create a false narrative that misleads the public. This manipulation, unfortunately, resonates with people who fall victim to this narrative.

## **MILITARY'S ROLE IN REDRESSAL OF MISINFORMATION/ PROPAGANDA**

1. The military serves as the ultimate tool of the state in maintaining order and preventing violence.
2. The military's primary responsibility is national security, and it should remain focused on that. Identifying and exposing false propaganda is the responsibility of other institutions and the public, not the military's.
3. It is common knowledge that the personnel associated with Armed Forces are discouraged from having social media presence. Armed forces personnel are advised to instead focus on the core principles of professionalism, discipline, and training for national security. They are reminded that their primary duty is to serve the nation with unwavering dedication, while preserving the dignity and operational effectiveness of the Armed Forces.
4. The **public must take it upon themselves to recognize and confront the misinformation/ disinformation (definitions placed Figure:34) and propaganda being spread**, both internationally and domestically, about Pakistan and its Armed Forces.
5. The Army should not be expected to have its officers participate in daily media debates to clarify what is true or false. Its role is to ensure national security, and it must be allowed to focus solely on this responsibility.

<b>Disinformation</b>	Information that is <b>false</b> , and the person who is disseminating it <b>knows it is false</b>
<b>Misinformation</b>	Information that is <b>false</b> , but the person who is disseminating it <b>believes that it is true</b>
<b>Mal-information</b>	Information that is <b>based on reality</b> but it is <b>used to inflict harm</b> on a person, org or country
<b>Free Speech vs Dangerous Speech</b>	<b>Dangerous speech</b> incites <b>harm or violence</b> against individuals or groups. Whereas, <b>Free speech</b> allows people to discuss their <b>beliefs, thoughts and ideas openly</b>
<b>5 Categories of Dangerous Speech</b>	<b>Dehumanizing language, Coded language, Suggestions of impurity, Verbal attacks against women and Reversal of reality</b>

**Figure:34 – Definitions Pertinent to Info Warfare**

## **INTERNET SLOWDOWN/ RESTRICTIONS ON SM PLATFORMS, INSTALLATION OF FIREWALL**

### 1. **Limited Internet Infrastructure**

- a. Pakistan's **internet is supported by 7 submarine cables**. Pakistan's internet connectivity is currently supported by only seven submarine cable systems—an inherently limited configuration that constrains bandwidth capacity and exposes the national network to considerable risk, wherein the malfunction of even a single cable can lead to substantial service disruptions. In contrast, **India possesses 20 cables with a total bandwidth of 138.6 Tbps**, significantly outperforming Pakistan's capacity.
- b. Pakistan has CDN (Content Delivery Network) systems in 38 cities, which help in the distribution of content such as videos, images, and text. However, a large portion of internet traffic still relies on outdated gateways, exacerbating slow speeds.

### 2. **Technological and Resource Limitations**

- a. Pakistan's **internet infrastructure is reliant on just 274 MHz spectrum and 8 TB of bandwidth from existing cables**, which is insufficient to meet the growing digital demands.
- b. Frequent **technical issues, including errors in the configuration** of major ISP networks, have led to significant reductions in internet speeds, in some cases as much as 70%.
- c. Additionally, the **lack of robust fiber optic infrastructure**, along with frequent power outages affecting service providers, contributes to slow speeds.

### 3. **Global and Local Disruptions**

- a. There are **532 submarine cables globally responsible for internet connectivity**, with **150-200 cables experiencing disruptions annually**. These damages typically result from **fishing activities (which account for 70% of the disruptions) and natural causes (12%)**.
- b. Cyberattacks, such as **DDoS** attacks from neighboring India, have also impacted internet traffic significantly.

4. **VPN Use and Encryption**. The rising usage of Virtual Private Networks (VPNs) introduces encryption, tunneling, and extended routing, all of which contribute to slower internet speeds. This trend further complicates the internet speed issue in the country.

2. **Cyber security Concerns**. Pakistan has **faced 34 mn cyberattacks in the last two**

**years**, with a staggering **300% increase in spyware attacks** in the first quarter of 2024. Cyberattacks on public sector institutions, IT companies, and financial sectors have been on the rise, highlighting vulnerabilities in national cybersecurity.

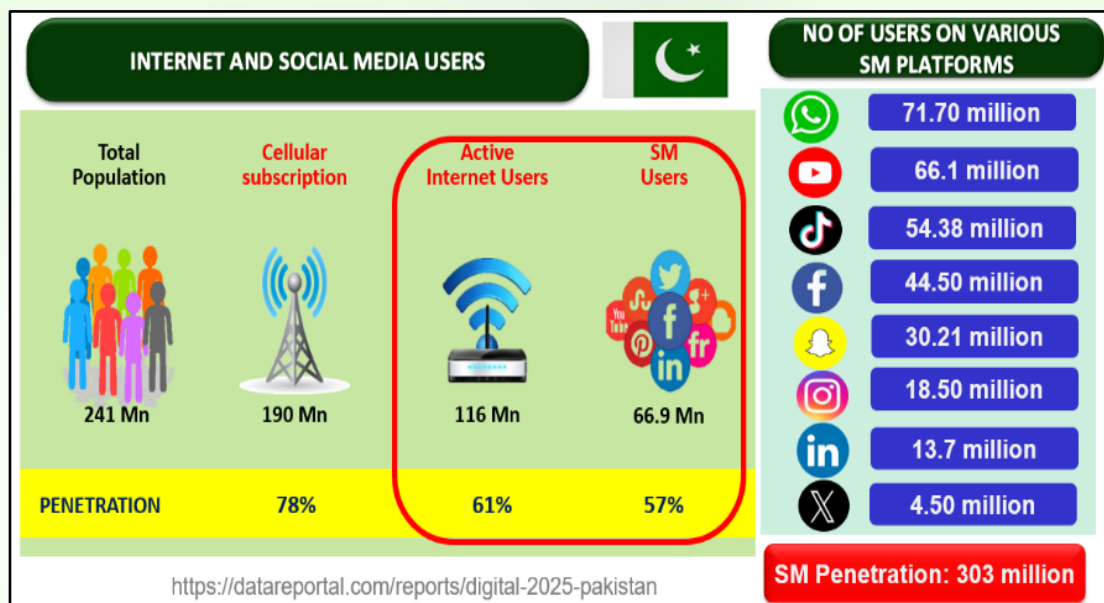
5. **Installation of Firewall and Social Media Restrictions.** Firewalls have been implemented to filter data on social media platforms, block propaganda, and restrict access to prohibited content. These measures are not unique to Pakistan, as other countries like **Saudi Arabia and Turkey** also employ national firewall systems to enforce their cybersecurity and content control policies.

6. **Digital Landscape and Internet Access in Pakistan** (Figure:35)

- a. **116 mn internet users**
- b. **66.9 mn social media users**

7. **Pakistan IT Potential**

- a. **2nd most financially attractive** destination **in offshore outsourcing.**
- b. **2nd largest provider** of **software and tech services.**
- c. **4th fastest-growing** in **freelancing.**
- d. **4th largest IT workforce.**
- e. IT **labor** services in Pakistan are **70% more cost-effective** than N. America and Europe.
- f. **600,000+ IT & BPO** (Business Process Outsourcing) professionals in Pakistan.
- g. **250 x e-Rozgaar centers across 36 x districts.**
- h. **ICT exports to 170 x countries.**
- i. **43 x Software Tech Parks** (STPs) managed by PSEB (Pak Software Export Board).
- j. **20,000 x IT&ITeS companies** are registered with the SECP.



**Figure:35 – Digital Landscape & Internet Access in Pakistan**

**PREVENTION OF ELECTRONIC CRIMES ACT (PECA) AMENDMENT BILL  
2016 AND 2025**

1. **Context.** The Prevention OF Electronic Crimes Act (PECA) Amendment Bill 2025, was passed in National Assembly on 23 January 2025. The bill seeks to enhance accountability, protect digital rights, and ensure a safer online environment for citizens.

2. **Key Differences Between PECA Bill 2016 and PECA Amendment Bill 2025**

a. **Establishment of Regulatory Authority**

- 1) **PECA Bill 2016.** PECA Bill 2016 lacked a dedicated authority for regulating social media.
- 2) **PECA Bill 2025.** The amendment proposes the creation of a [Social Media Protection and Regulatory Authority \(SMPRA\)](#), which will oversee social media platforms, enforce user rights, and mandate the registration of these platforms.

b. **Cybercrime Investigation**

- 1) **PECA Bill 2016.** Handled by Federal Investigation Agency (FIA's) Cybercrime Wing.
- 2) **PECA Bill 2025.** [National Cybercrime Investigation Agency \(NCCIA\)](#) has been established as a specialized body for cybercrime investigations.

c. **Social Media Tribunals**

- 1) **PECA Bill 2016.** No special tribunals.
- 2) **PECA Bill 2025.** [Establishes Social Media Protection Tribunal \(SMPT\)](#) to hear social media-related cases. Operational details of which are as under: -
  - a) The federal government will appoint the members of the tribunal for **3 x years**.
  - b) The tribunal will be required **to dispose of cases within 90 days**. The verdict of the tribunal can be challenged in the **Supreme Court within 60 x days**.
  - c) The tribunal will consist of **6 x members and a chairman**. **3 x members of the tribunal will be appointed for 3 x years**, while the information secretary, chairman Pakistan

Telecom Authority (PTA), and secretary Information Technology (IT) will be the members of the tribunal.

d. **Definition of Fake New**

- 1) **PECA Bill 2016**. No clear definition.
- 2) **PECA Bill 2025**. The amendment introduces Section 26(A), which defines and criminalizes the dissemination of fake news, imposing penalties for such offenses. Fake news is defined as:

*Any information system, that a person knows or has reason to believe to be false or fake and likely to cause or create a sense of fear, panic or disorder or unrest in general public or society.*

e. **Online Content**

- 1) **PECA Bill 2016**. Section 37 of PECA deals with the illegal online content.
- 2) **PECA Bill 2025**. Section 37 was expanded to incl any content against the judiciary, armed forces, and Islam. During sessions of the National Assembly and Senate, if any part of the parliamentary proceedings is expunged (i.e., officially removed from the record by the Speaker or Chairman for being inappropriate, defamatory, or against parliamentary rules), the media will be prohibited from publishing or broadcasting that content.

f. **Penalties for Fake News**

- 1) **PECA Bill 2016**. Covered under general cybercrime laws.
- 2) **PECA Bill 2025**. **Up to 3 x years imprisonment and Rs. 2 mn fine** for spreading fake news.

g. **Platform Registration**

- 1) **PECA Bill 2016**. No mandatory registration of social media platforms.
- 2) **PECA Bill 2025**. Mandates registration of all social media platforms in Pakistan. Social media platforms may be required to register with the government, establish local offices, and appoint representatives in Pakistan. Companies will also be given deadlines to remove content flagged by the authority or face penalties.

h. **Appeals Process**

- 1) **PECA Bill 2016**. Appeals handled by conventional courts.

- 2) **PECA Bill 2025.** Appeals against the decision of the Tribunal can be made to the Supreme Court within 60 x days of receipt of decision.

i. **Content Removal Powers**

- 1) **PECA Bill 2016.** PTA could remove content based on government directives.
- 2) **PECA Bill 2025.** SMPRA will regulate” unlawful or offensive content and issue [directions to block or remove unlawful or offensive content.](#)

j. **Accountability of Social Media Companies**

- 1) **PECA Bill 2016.** Limited enforcement mechanisms. for non-compliance.
- 2) **PECA Bill 2025.** Social media companies can be penalized or blocked.

k. **Legal Powers of Investigators**

- 1) **PECA Bill 2016.** FIA officers had cybercrime investigative powers.
- 2) **PECA Bill 2025.** [NCCIA officers get powers equivalent to police officers of similar rank.](#)

### 3. Composition of SMPRA & NCCIA

<p><b><u>Social Media protection and Regulatory Authority (SMPRA)</u></b></p> <ul style="list-style-type: none"> <li>▪ The authority shall consist of a Chairperson and 8 members out of Which Secretary Ministry of Interior, Chairman PEMRA and Chairman Pakistan Telecommunication Authority (PTA) or any member of PTA nominated by him shall be the ex-officio members.</li> </ul> <p><b><u>Power and function of the Authority</u></b></p> <ul style="list-style-type: none"> <li>▪ Ensure online safety and rights of persons on social media platforms from any kind of harm.</li> <li>▪ Regulate the unlawful or offensive content on the social media platforms accessible from Pakistan.</li> <li>▪ Regulate enlistment of social media platforms.</li> <li>▪ Grant, renew, refuse, suspend and revoke enlistment of social media platform</li> <li>▪ To partially or fully block social media platform if it fails to comply with the provisions under this Act until the compliance is made.</li> </ul>	<p><b><u>National Cyber Crime Investigation Agency (NCCIA)</u></b></p> <ul style="list-style-type: none"> <li>▪ NCCIA shall be headed by a Director General, who shall have the power to employ any other officers, prosecutors and staff as may be prescribed.</li> </ul> <p><b><u>Power and function of the Authority</u></b></p> <ul style="list-style-type: none"> <li>▪ NCCIA, as an investigative agency, will be responsible for conducting inquiries, investigations, and prosecutions of offenses specified under this Act.</li> </ul>
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## FREEDOM OF EXPRESSION UNDER CONSTITUTIONAL LENS

1. Pakistan's constitution grants every citizen the right to freedom of expression. However, this right is not absolute and must be exercised with responsibility to maintain social harmony, peace, and national security. The freedom to express oneself does not imply the right to spread false or hateful content for personal or group interests, which could incite social unrest or harm the state's security.
2. **Article 19** of the constitution states that "Every citizen shall have the right to freedom of speech and expression, and there shall be freedom of the press, subject to any reasonable restrictions imposed by law in the interest of the glory of Islam, the integrity, security, or defence of Pakistan, friendly relations with foreign states, public order, decency, or morality, or in relation to contempt of court, commission of or incitement to an offence."
3. **PPC Sections 124-A (Sedition)**. Criminalizes speech or expression that incites hatred or disaffection against the government.
4. **PPC Section 153-A (Promoting Enmity between Groups)**. Prohibits speech that creates hostility between different religious, racial, or ethnic groups.
5. **PECA 2016**
  - a. **Section 10 (Cyber Terrorism)**. Criminalizes online speech that threatens national security.
  - b. **Section 20 (Defamation)**. Penalizes online defamation with fines and imprisonment.
  - c. **Section 37 (Content Regulation by PTA)**. Empowers the Pakistan Telecommunication Authority (PTA) to block or remove content deemed against national security, morality, or Islam.
6. **PECA Amendment 2025. Section 26(A)** - "Whoever intentionally disseminates, publicly exhibits or transmits any information through any information system, that he knows or has reason to believe to be false or fake and likely to cause or create a sense of fear, panic or disorder or unrest in general public or society shall be punished with imprisonment which may extend up to three years or with fine which may extend to two mn rupees or with both."
7. When statements made by journalists or social media influencers pose a threat to the state or contribute to societal division, it becomes incumbent upon the state to intervene through lawful means to protect the integrity of its institutions and ensure public welfare. Such measures are not aimed at curbing free expression but at ensuring that this freedom is

exercised within the bounds of responsible conduct, safeguarding both the collective well-being and the national interest.

8. This approach is not unique to developing nations. Even in the most advanced democracies, comparable measures are employed to preserve social cohesion and public order. For instance, **in July–August 2024, the United Kingdom witnessed widespread anti-immigration riots triggered by false social media claims surrounding the Southport stabbings. The disinformation incited violent clashes, vandalism, and attacks on mosques, in response to which law enforcement authorities conducted numerous arrests.**

9. The state's role in regulating potentially harmful speech is rooted in the imperative to protect citizens from divisive and destabilizing rhetoric, thereby ensuring that the democratic principles of freedom are not misused to threaten the peace and unity of the nation.

10. **TLP's Latest Round of Protests – Freedom of Expression or Terrorism**

- a. The recent Muridke unrest originated from Tehreek-i-Labaik Pakistan's (TLP) attempt to march toward Islamabad in solidarity with Gaza and protest against Israel.
- b. Keeping in view the former conduct of TLP, the government had implemented Section 144 as a preventive security measure to restrict unlawful assemblies, maintain public order, and preempt any potential disruption to peace and administrative functioning. However, TLP proceeded with the march in defiance of the restrictions, resulting in violent confrontations and disturbance of public order.
- c. The demonstration resulted in casualties (1 x police personnel, 3 x protesters and 1 x civ bystander martyred; 112 x law enforcement personnel injured, 17 x of whom sustained bullet wounds), arson and extensive damage to public and private property (40 x government and private vehicles burned down), undermining civic order and public safety.
- d. The use of violence, obstruction of highways and attacks on security personnel by TLP present a classic example of unlawful protest, excluded from the constitutional ambit of freedom of expression.

## RISING TRENDS OF PAKISTANI YOUTH MOVING ABROAD

1. Increasing expatriation is a global trend, and Pakistan is no exception to it.
2. For every million people worldwide, almost **36,000 have emigrated to a different country at one point or another**.
3. Technology has transformed the world into a global village, enabling people to work and travel globally with ease, reducing the limitations once caused by geographic boundaries.
4. Expatriation must be recognized not as brain drain, but as strategic brain gain—where the global mobility of talent strengthens national resilience by cultivating expertise, fostering international networks, and enabling the transfer of knowledge, capital, and innovation back to the country through both returnees and a globally positioned diaspora.
5. Currently, **11 mn Pakistanis live abroad**, making up **4.6%** of the population. Their remittances play a key role in Pakistan's financial stability.
6. It is not solely the expatriate population that has burgeoned over the years; Pakistan's domestic labor force has experienced a notable expansion, **increasing from 65.5 mn to 71.76 mn over recent years**.<sup>74</sup>
7. Remittances benefit Pakistan by stabilizing the currency, reducing foreign debt reliance, and boosting the local economy through investments in businesses and improved standards of living for families.
8. According to a report by the Pakistan Institute of Development Economics (PIDE), **approximately 200,000 skilled professionals** moved overseas in 2024 availing employment opportunities.
9. Pakistan's remittances in FY2024 reached **\$30.3 bn**, and the country remains among the top 5 remittance-receiving nations.<sup>75</sup>
10. **UAE Model**
  - a. As of December **2024, population of UAE is 12.50 mn**.
  - b. Expat population in the UAE **stands at 11.06 mn, significantly larger than the Emirati population, which totals 1.44 mn**.
  - c. Expat residents constitute approximately **88.50% of the population, while Emiratis make up around 11.50%**.
  - d. The UAE is the Middle East's third largest economy, and one of the wealthiest countries in the region on a per capita basis.

<sup>74</sup> [https://www.finance.gov.pk/survey/chapter\\_22/PES12-POPULATION.pdf?](https://www.finance.gov.pk/survey/chapter_22/PES12-POPULATION.pdf?)

<sup>75</sup> <https://www.dawn.com/news/1844949>

- e. **Its GDP in 2024 was estimated at US\$568 bn.**
- f. The UAE has six per cent of the world's oil reserves and the seventh largest proven natural gas reserves, yet the state has never seen migrant workers as a threat and has always benefitted from their services.



POLICY WIRE

**PAKISTAN'S ECONOMIC INDICATORS: FY21 TO FY25**

Indicator	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025 (Current)	FY 2025
<b>Exports</b>	\$21 bn	\$26.8 bn	\$21 bn	\$30.351 bn	\$32.34 bn	\$32.1 bn
<b>Current Account Balance</b>	\$3.6 bn (Deficit)	\$13.8 bn (Deficit)	\$3.3 bn (Deficit)	\$0.7 bn (Deficit)	\$0.7 bn (Surplus)	1.1 bn (Surplus)
<b>Forex Reserves</b>	\$24.3976 bn	\$15.449 bn	\$9.16 bn	\$13.996 bn	\$16.05 bn	\$14.51 bn
<b>KSE-100 Index</b>	47,896	44,929	40,000.8	75,878	113,000	125,627.31 (closing on Jul 31)
<b>FDI</b>	\$1.8205 bn	\$1.935 bn	\$1.627 bn	\$2.346 bn	\$1.523 bn	\$2.46 bn
<b>Remittances</b>	\$24.2 bn	\$26.1 bn	\$20.5 bn	\$28.782 bn	\$20.8 bn	\$38.3 bn
<b>RDA Deposits</b>	N/A	\$4.606 bn	\$7.035 bn	\$8.055 bn	\$9.564 bn	\$10748
<b>FBR Tax Collection</b>	Rs.4.74 Tn	Rs. 6.14 Tn	Rs. 7.16 Tn	Rs. 9.25 Tn	Rs. 7.34 Tn	Rs. 11.7 Tn
<b>Inflation (CPI)</b>	8.8%	11.3%	29.2%	24.5%	5.9%	4.7 %

## MINERAL RESOURCES

### 1. Mineral Reserves of Pakistan<sup>76</sup>

MINERALS	RESERVES (mn tons)	Grade
Chromite	2.525	Low to Medium
Copper	1352	Low to High
Gold	1,656.00	Low to High
Iron Ore	1,427.20	Low to High
Lead Zinc	23.72	Low to Medium
Coal	1,85,000	Low to Medium
Gypsum	6 bn Tons	Medium to High
Marble and Granite	295 bn tons	Medium to High

### 2. Province wise Mineral Potential

#### a. Punjab

- 1) **Salt - 25-30 bn MT**<sup>77</sup> in salt range hills.
- 2) **Metallic mineral resource estimation of ~250 MT Iron.**<sup>78</sup>
- 3) **Coal** resource estimation of **511 MT** in <sup>79</sup> Makerwal coal field in trans-Indus salt range and Dandot-Khushab coal fields in the central and eastern salt range.
- 4) **Gypsum - 11.020 MT** reserves near Daudkhel distt, Mianwali.<sup>80</sup>
- 5) **Iron ore** resource estimate at Chiniot of **149.8 MT.**<sup>81</sup>

#### b. KP

- 1) **Marble 2900 MT**<sup>82</sup> in Malakand and Mardan region.
- 2) **Chromite 4.5 MT**, most of which is in Hazara region.
- 3) **Coal 91 MT** near Peshawar region.
- 4) **Granite - 9,000 MT** of Granite in Buner<sup>83</sup>

<sup>76</sup>[https://www.pc.gov.pk/uploads/pub/FIRST\\_05\\_PAGES\\_STRATEGY\\_FOR\\_MINERAL\\_SECTOR\\_DEVELOPMENT\\_IN\\_PAKISTAN.pdf](https://www.pc.gov.pk/uploads/pub/FIRST_05_PAGES_STRATEGY_FOR_MINERAL_SECTOR_DEVELOPMENT_IN_PAKISTAN.pdf)

<sup>77</sup> <https://punjmin.punjab.gov.pk/rock-salt#:~:text=Estimated%20total%20reserves%20of%20Rock,Tons%20in%20whole%206000%20Sq.>

<sup>78</sup> <https://punjab.gov.pk/node/6251>

<sup>79</sup> <https://punjab.gov.pk/node/6251>

<sup>80</sup> [https://punjmin.punjab.gov.pk/gypsum\\_project](https://punjmin.punjab.gov.pk/gypsum_project)

<sup>81</sup> [https://pmc.punjab.gov.pk/system/files/PHASE\\_II\\_OF\\_EXPLORATION\\_RESOURCE\\_ESTIMATION\\_IN\\_PUNJAB.pdf](https://pmc.punjab.gov.pk/system/files/PHASE_II_OF_EXPLORATION_RESOURCE_ESTIMATION_IN_PUNJAB.pdf)

<sup>82</sup> [https://sccip.com.pk/downloads/Mines\\_&\\_Minerals\\_Resources\\_in\\_KPK.pdf](https://sccip.com.pk/downloads/Mines_&_Minerals_Resources_in_KPK.pdf)

<sup>83</sup> <https://kpboit.gov.pk/buner-district/>

- 5) Bauxite – 74 MT in Hazara.<sup>84</sup>
- 6) Nizampur iron ore deposit has average grade of 29 % iron and 100 MT ore reserves.

c. **Balochistan**

- 1) Reko Diq 5.87 BT of copper and 42 mn ounces of gold.
- 2) Copper 812 MT (412 mn in Saindak, 400 MT in Dasht-e-kin).
- 3) Iron ore 75 MT in Chagai districts of Pachin Koh, Chigendik, and Chilgazi.
- 4) Marble - Julil (10 MT), Mashkicha (12 MT), and Butuk (15 MT).
- 5) Sulfur reserves in Koh-i-Sultan are 50 MT.
- 6) Coal - Degari, Sinjidi, Mach, Pir Ismael, Ziarat, Duki, and Chamalang have a total coal resource of 217 MT.
- 7) Barite - Khudzar providing over 1.7 MT of the entire 5 MT of yearly output.
- 8) Tungsten, Lead, and Zinc - More than 26 MT of lead and zinc ore are in Lasbela and Chagai.

d. **Sindh**

- 1) Coal – 184 BT: in Sonda, Thar, Badin, Jampir. Only Thar coal reserves are 175.506 BT.
- 2) Iron ore- 430 MT In Sindh, iron ore, is usually mined in Thatta.<sup>85</sup>
- 3) Bauxite - 74 MT.
- 4) Antimony reserves are 12000 tons in Pishin Qila Abdullah.
- 5) Sulphur – 80,000 tons.
- 6) Estimated reserves of Granite are 10.06 BT in Tharparkar<sup>86</sup>

e. **AJ&K**

- 1) Proven reserves of more than 50 mn grams of rubies<sup>87</sup>
- 2) Reserves of bauxite, laterite and ochre are Dhanwan (alumina 41- 60%, silica 18-40%, iron 1-8%) is 4.9 MT.

<sup>84</sup> [https://www.internetchemistry.com/publications/farzana\\_panhwar/mineral-resources-sindh-pakistan.pdf](https://www.internetchemistry.com/publications/farzana_panhwar/mineral-resources-sindh-pakistan.pdf)

<sup>85</sup> <https://sbos.sindh.gov.pk/files/SBOS/Sindh%20Minerals%20Statistics/SINDH%20MINERAL%20STATISTICS%202021-22.pdf>

<sup>86</sup> <https://sbos.sindh.gov.pk/files/SBOS/Sindh%20Minerals%20Statistics/SINDH%20MINERAL%20STATISTICS%202021-22.pdf>

<sup>87</sup> <https://www.app.com.pk/articles/ajks-huge-mineral-gems-deposits-can-change-regions-socioeconomic-status/>

- 3) Kamroti (alumina 50-70%, silica 9-28%, iron 1-2.5) is 1.36 MT.
- 4) Sawar (alumina 52-56%, silica 25%, iron 5%) is 0.93 MT.
- 5) Dandili (alumina 34-46%, silica 36- 44%) is 1.18 MT.
- 6) Nikial (alumina 41-46%, silica 13-35%, iron 2-27%) is 0.424 MT.
- 7) Shisetar is 0.656 MT.
- 8) Iron is 1.36 MT.

f. **GB**

- 1) Arsenic (arsenopyrite, chalcopyrite, malachite, pyrite) from Dainyor Nala (15km NE of Gilgit) and Bagrot Nala (20km N of Gilgit).
- 2) Bauxite from Chapursan (Hunza).
- 3) Copper and gold associated with gossan/red iron oxide/ochre and base metals of Karakoram and Shyok Sutures like Dainyor Nala (NW of Gilgit).
- 4) Lithium/lepidolite from Shengus of Nanga Parbat.
- 5) Sheet mica/muscovite from many pegmatites like Astor.
- 6) Graphite from Nagar Hunza, Chalt and Chelish.
- 7) Coal from Chapursan valley.

## EXPLORATION OF PAKISTAN OIL RESERVES – A GAME CHANGER FOR NATIONAL ECONOMY

1. In an era of intensifying global energy transitions, Pakistan stands at a critical crossroads where strategic oil exploration is not merely a matter of economic necessity, but of national resilience and sovereignty.
2. Despite possessing substantial proven and technically recoverable reserves, including high-grade crude and vast untapped shale and offshore potential, Pakistan has only marginally capitalized on its indigenous hydrocarbon assets.
3. The draining foreign exchange due to energy imports, rising domestic demand, and a shifting global paradigm that may soon render unexploited oil reserves economically obsolete, necessitates accelerating exploration through credible international partnerships to capitalize on resources.
4. Tapping these resources through cost-effective, strategically aligned partnerships can boost energy independence, stabilize the economy, and position Pakistan as a forward-looking player in the global energy landscape.
5. **Early Discoveries and Oil Exploration**
  - a. The first oil field in Pakistan was discovered in the province of Balochistan near a Sui gas field in 1952.<sup>88</sup>
  - b. **Pakistan's** journey into **fossil fuel exploration began in 1960**, initially centered around Sindh and later expanding into KP, which has now emerged as the country's leading oil-producing region.
  - c. In 1964, the **Toot Oilfields** were discovered in the Potohar region of Punjab, marking a significant milestone in Pakistan's energy sector. This discovery, made during the regime of President Ayub Khan, was the result of collaborative exploration and drilling efforts by Pakistan Petroleum and Pakistan Oilfields. The Toot Oilfields were estimated to hold an impressive production capacity of approximately **60 mn barrels of oil**, underscoring their strategic importance. Following the successful development of the site, **commercial production**

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<sup>88</sup> <https://www.dawn.com/news/733749/history-of-energy-in-pakistan-time-line#:~:text=1952%3A%20The%20first%20oil%20field,near%20a%20Sui%20gas%20field>

**commenced in 1967**, positioning the **Toot Oilfields** as one of the early pillars of Pakistan's domestic oil industry.<sup>89</sup>

## 6. Pakistan's Oil Reserves

- a. The state's oil reserves have significantly depleted due to consumption over decades. Details are as under: -

Province	Total (Mn barrels)	Consumed (Mn barrels)	Remaining (Mn barrels)
Sind	509.58	430.60	78.98
Punjab	457.43	383.20	74.23
KP	264.83	170.59	94.24
Balochistan	1.84	0.24	1.60
<b>Total</b>	<b>1,233.68</b>	<b>984.63</b>	<b>249.05</b>

- b. Pakistan has **consumed around 985 mn barrels**, or in terms of percentage would be **79.8%**, of its **1,234 mn barrels of the total oil reserves**, according to a report the Petroleum Division filed to the **Auditor General of Pakistan (AGP)**.<sup>90</sup>
- c. Pakistan's current **proven oil reserves are estimated at 353 mn barrels**, with **current production around 60,000 barrels per day**. According to **U.S. Energy Information Administration (EIA)**, **Pakistan has 9.1 bn barrels of technically recoverable shale oil**, which remains largely unexploited.

## 2. New Oil Discoveries and Exploitation Potential

- a. A **three-year geological survey carried out in 2015**, suggests that **Pakistan may hold the world's fourth-largest offshore oil and gas reserves**, after **Venezuela, Saudi Arabia, and Canada**.
- b. Pakistan's recently discovered crude oil has been classified as high-grade, with a gross refining margin comparable to premium Gulf benchmarks. According to Cnergyico Vice Chairman Usama Quraishi, the crude requires neither blending nor refinery modifications - underscoring its low-cost, high-yield extraction potential and operational compatibility with existing infrastructure.
- c. **Former Energy Minister, Mohammad Ali estimated that \$25–30 bn investments in the sector could unlock 10% of these reserves over the next decade**, significantly **reducing reliance on external sources** and **enhancing Pakistan's energy autonomy**.

<sup>89</sup> Ibid

<sup>90</sup> <https://sapphireassociate.com/most-of-pakistans-oil-gas-reserves-consumed/>

### 3. Rationale behind Oil Exploration

- a. **Pakistan's oil import bill exceeds approximately \$12 bn annually**, with oil alone accounting for nearly one-fifth of the total import bill. The country's circular debt in the sector amounts to **Rs. 1.14 trillion**.<sup>91</sup>
- b. With most imports sourced from **Saudi Arabia, UAE, Qatar, Kuwait, and China**, this dependency exposes Pakistan to external shocks and fiscal vulnerability.
- c. The urgency to reduce reliance on imported energy is underscored by **Pakistan's rising energy demand**, projected to **grow 1.5 times by 2030, from 94 to 141 mn tons of oil equivalent**. If local reserves remain underutilized, this will only compound the country's balance of payments pressure.
- d. Meanwhile, the global energy landscape is undergoing an irreversible shift. With intensifying international commitments to climate action, oil's long-term relevance is expected to decline. In 2024, **renewables and other low-carbon sources supplied over 40% of global electricity** for the first time.
- e. Even in Pakistan, **oil's share in the energy mix is projected to fall from 12% to 2% by 2034**. In such a context, delayed exploitation may render existing reserves economically obsolete.
- f. Against this backdrop, the **US–Pakistan oil exploration partnership** offers a time-sensitive opportunity to harness underutilized national assets.
- g. Earlier this year **Pakistan and Turkey signed a similar agreement** to explore **40 offshore blocks in the Makran and Indus basins** at Pakistan Minerals Investment Forum in Islamabad. The deal marked a strategic leap in Pakistan's offshore prospecting.
- h. Pakistan Petroleum Division is currently seeking bids from interested investors to grant rights for drilling an offshore well, the bids for which will open on October 31, 2025.
- i. **Collaborating with credible partners like the U.S. positions Pakistan as a rational, investment-ready state**, fostering diplomatic goodwill and investor confidence, along with ensuring economic security of the state.

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<sup>91</sup> <https://epaper.brecorder.com/2025/05/15/1-page/1049738-news.html#:~:text=Pakistan's%20oil%20and%20gas%20sector,is%20related%20to%20gas%20sector.>

#### 4. **Successful International Partnerships in Oil Exploration**

- a. International collaboration in resource extraction is neither novel nor unprecedented. For instance, **five major U.S. oil companies - Chevron, Texaco, Exxon, Mobil, and Gulf - jointly established what became Saudi Aramco**, enabling the Kingdom to **discover and develop one of the world's largest oil reserves**.
- b. Similarly, global energy giant Chevron partnered with Kazakhstan's national firm, KazMunayGas, to develop the Tengiz oil field - one of the world's largest shallow-water discoveries - laying the foundation for the country's transformation into a multi-bn-barrel export economy.
- c. In the 1960s, Brazil's Petrobras began forming exploration partnerships with international oil majors through "risk contracts," paving the way for future breakthroughs. By the 2000s, collaborative programs with companies like Shell, Exxon, and Total enabled Brazil to unlock its ultra-deepwater pre-salt reserves, ultimately propelling the country to become one of the world's-largest oil producers by the mid-2020s.
- d. In 1994, Azerbaijan signed the landmark Azeri-Chirag-Gunashli agreement - famously dubbed the "Contract of the Century"- with a consortium of ten Western energy firms led by BP. This partnership not only unlocked vast offshore reserves but also channeled over US \$170 bn into the State Oil Fund, catalyzing the nation's rapid transformation into a major Eurasian energy exporter.

#### 5. **Conclusion**

- a. Pakistan's energy future hinges not merely on what the state is in possession of, but on the timeliness, foresight, and strategic alliances it forges to bring those resources to surface. As the world edges toward a post-oil economy, delayed action risks forfeiting immense economic value and energy security. A deliberate, collaborative, and future-ready exploration policy is not just prudent, but imperative.
- b. **Politicizing energy policy damages national interest and disincentives critical foreign investment** at a time when **decisive action is needed**. At this critical juncture, **India and hostile elements are actively fueling propaganda against the deal to undermine investor sentiment and keep Pakistan strategically dependent**.

- c. It is crucial to recognize that the policy approach to national interest must be driven by pragmatism and not populism, to seize the moment before Pakistan's reserves lose their global economic relevance.



POLICY WIRE

## THE INDUS WATERS TREATY

1. The Indus Waters Treaty of 1960, **brokered by the World Bank**, divided the six rivers of the Indus Basin between India and Pakistan. India received exclusive control over the eastern rivers (Ravi, Beas, Sutlej), while **Pakistan gained exclusive rights to the western rivers** (Indus, Jhelum, Chenab).
2. The treaty, however allows India to use the western rivers only for limited domestic, non-consumptive, agricultural, and run-of-river hydroelectric projects - within design and storage constraints outlined in treaty annexures (storage limited to ~3.6 MAF).<sup>92</sup>
3. **Dispute Resolution Mechanism**
  - a. The Indus Waters Treaty (IWT) establishes a **three-tiered dispute resolution mechanism** aimed at preventing unilateral action and maintaining cooperative management of shared water resources. The framework is designed to ensure that disagreements are addressed progressively as under: -
    - 1) Technical matters are first considered by the **Permanent Indus Commission (PIC)**.
    - 2) If unresolved, they may be referred to a **Neutral Expert**, typically in cases involving engineering or procedural questions.
    - 3) **Legal disputes** or those involving the interpretation or application of treaty provisions may be escalated to a **Court of Arbitration (CoA)**, convened with the procedural involvement of the **World Bank**, which plays a facilitative role in both fora.
  - b. This mechanism has been operationalized in the past, notably in disputes surrounding the **Baglihar and Kishanganga** hydroelectric projects. In both instances, the treaty's institutional safeguards functioned as intended—ensuring due process, avoiding escalation, and preserving the integrity of the agreement.
  - c. The treaty contains **no provision for unilateral suspension or withdrawal**. **Article XII** explicitly states that any modification to the treaty requires **mutual consent** of both parties. To date, **no amendments** have been enacted since the treaty's entry into force.

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<sup>92</sup> <https://www.outlookindia.com/national/indus-waters-treaty-unfair-and-outdated>

#### 4. Abeyance of IWT – Implications for Pakistan

- a. India's current capacity is limited to modest temporal adjustments in water releases, with no credible ability to affect downstream volumetric flows at scale during the high-flow season, due to the following reasons: -
  - 1) India presently lacks the infrastructure to **significantly curtail water flows** on the **Indus, Jhelum, and Chenab** during the **high-flow season (May–Sep)**. These rivers carry **tens of bns of cubic meters** of water annually, driven primarily by **Himalayan snowmelt**.
  - 2) Additionally, key projects such as **Baglihar and Kishanganga** are **run-of-the-river hydropower installations**, which have **minimal live storage** and are designed for electricity generation, not flow regulation.

#### 2. Challenges for India in Effective Suspension of the IWT

- a. Attempts to **hold back large flows during snowmelt season** risk flooding India's own upstream regions.
- b. **Impact during the dry season will be limited under current storage capacity; developing meaningful disruption capacity would require construction of large new dams**, consuming years or decades.
- c. **Suitable sites for new storages in Indian-occupied Kashmir are scarce, geologically difficult, and prohibitively expensive to develop.**
- d. **New projects would be quickly detected by satellites**, inviting international scrutiny and regional escalation. **Pakistan has declared new storage on the western rivers as an act of war**, and any such action by India would risk grave political and security consequences.
- e. Abrogation **undermines India's credibility as a responsible treaty partner** and complicates its efforts to project reliability in global negotiations.
- f. **India itself is downstream on rivers like the Brahmaputra**, and unilateral abrogation sets a precedent that China could exploit.

#### 2. Key Moments of Indian Violation of IWT

- a. **2013.** Court of Arbitration rules India must release minimum flows from the **Kishanganga Dam** (on a Jhelum tributary) and **cannot draw down its reservoir below a certain level**, affirming Pakistan's downstream rights under the treaty.
- b. **2016.** After the Uri attack, India **suspends Indus Commission meetings and vows to maximize its share under the treaty**. **For the first time, Indian leaders publicly link water to security concerns.**

- c. **2019.** Following the Pulwama attack, **India reiterates plans to fully use its eastern rivers.** Though legal under the treaty, the rhetoric marks a growing politicization of water-sharing.
- d. **2022.** The World Bank, unable to get India and Pakistan to agree on a dispute resolution forum, **appoints both a neutral expert and a Court of Arbitration to handle disagreements over Indian dam designs on the Jhelum.** This is an unprecedented move showing deep procedural disagreement between India and Pakistan.
- e. **Jan 2023.** India **formally invokes Article XII (3), seeking to modify the treaty for the first time in its history.** It cites climate change, national needs, and Pakistan's "obstruction". **Pakistan rejects the proposal.**
- f. **Sep 2024.** India escalates its approach by **-serving a formal notice of its intent to amend the treaty** (essentially reasserting the January 2023 position with more urgency). It claims **the agreement is outdated and unfairly favors Pakistan.** No compromise is reached.
- g. **Apr 2025.** India announces it is **suspending its obligations under the Indus Waters Treaty** till "credible" action by Pakistan to end cross-border terrorism. Pakistan rejects the move as illegal and warns of international escalation.

## 2. **Indian Violation of IWT – Legal Lens**

- a. **Convention on the Law of the Non-Navigational Uses of International Watercourses.**
- b. **Article 7,** 'Watercourse States shall, in utilizing an international watercourse in their territories, take all appropriate measures to prevent the causing of significant harm to other watercourse States.'
- c. **Article 9,** 'Pursuant to article 8, watercourse States shall on a regular basis exchange readily available data and information on the condition of the watercourse, in particular that of a hydrological, meteorological, hydrogeological and ecological nature and related to the water quality as well as related forecasts.'

## WATER SCARCITY - RETHINKING PAKISTAN'S WATER FUTURE

1. Rethinking Pakistan's water future is no longer a matter of necessity, but of water security. As the world's fifth most populous country faces accelerating climate shocks, depleting freshwater reserves, and unsustainable population growth, the expansion of water infrastructure has become imperative. Every sector - agriculture, energy, health, and food security - rests upon the foundation of reliable water access. Without strategic investment in dams, reservoirs, and watershed systems, Pakistan risks not just economic stagnation, but systemic collapse.

### 2. Water Scarcity in Pakistan

- a. By various measures of water availability, from the Falken mark index - an indicator used to measure water scarcity - to the water poverty index, Pakistan currently stands as the **15th most water-stressed nation** in the world.<sup>93</sup>
- b. According to the International Organization for Migration (IOM), Pakistan is **predicted to slip into absolute water scarcity by 2035 — a frightening prospect for the world's fifth most populous country.**<sup>94</sup>
- c. Per the World Wildlife Fund-Pakistan (WWF-P), the country's annual per capita water availability has fallen from about **5,600 cubic meters in 1947 to just 930 cubic meters in 2023**, dangerously below the level conventionally defined as water scarcity (declining water availability over the years is at **Figure:36**).
- d. According to **Food and Agriculture Organization (FAO)** of the United Nations, **Pakistan's water stress is among the highest globally**, underscoring that securing the resource is now a matter of national survival.
- e. According to the **Global Climate Risk Index**, although Pakistan contributes only a fraction of global greenhouse gas emissions, it tops the chart of countries most impacted by the climate change.<sup>95</sup> (**Figure:37**)
- f. **Over 80 percent of the total population in the country faces 'severe water scarcity'** for at least one month of the year.<sup>96</sup>

<sup>93</sup> <https://www.dawn.com/news/1913435>

<sup>94</sup> <https://dtm.iom.int/youthengagement/flooded-yet-thirsty-climate-disaster-and-water-access-pakistan-during-2022-2023>

<sup>95</sup> <https://www.germanwatch.org/en/cr>

<sup>96</sup> <https://pide.org.pk/research/water-crisis-in-pakistan-manifestation-causes-and-the-way-forward>

- g. In light of these stark warnings on water scarcity and climate vulnerability, it is striking that Pakistan only introduced its first National Water Policy in 2018, an acknowledgment that came decades later than it should have.

### 3. Current Dams' Status

- a. **Pakistan is wasting 10 trillion gallons of water yearly due to the deficiency of water reservoirs.** Per head storage of water in the country is much lower compared to other countries.<sup>97</sup> **(Figure:38)**
- b. According to Federal Flood Commission Annual Report 2023, the total number of dams in **Pakistan currently stands at 816, of which 290 are categorized as large and 526 as small/ medium dams.**<sup>98</sup> Province wise number of completed and under construction dams are at **Figure:39.**
- c. Currently the dam status is as under: -
- |    |             |                                    |
|----|-------------|------------------------------------|
| 1) | Tarbela Dam | Filled to Capacity (5.85/5.85 MAF) |
| 2) | Mangla Dam  | 75% (5.48/7.28 MAF)                |
| 3) | Rawal Dam   | Filled to Capacity (0.03/0.03 MAF) |
| 4) | Khanpur Dam | Filled to Capacity (0.07/0.07 MAF) |
| 5) | Simly Dam   | Filled to Capacity (0.02/0.02 MAF) |
| 6) | Hub Dam     | 80% (0.51/0.64 MAF)                |
- d. Pakistan has the ability to store water for only 30 days' needs, which is far behind the rest of the world. When compared to other countries, India can store water for 190 days.<sup>99</sup> **(Figure:40)**
- e. With this limited capacity, Pakistan cannot effectively bank surplus rainwater or glacial melt for lean times. This precarious situation makes Pakistan highly exposed to any upstream disruptions and extreme weather event.
- f. The **gross capacity of all the available dams (small, medium and large) combined stands at 21.17 MAF**, with **current live storage capacity dropping down to 13.68 MAF** due to siltation and sedimentation.
- g. Pakistan has historically under-invested in water infrastructure and management. Large dams and conveyance networks built in the 1960s–70s

<sup>97</sup> [https://www.pips.gov.pk/wp-content/uploads/2024/09/WATER\\_SCARCITY\\_AND\\_WASTAGE\\_IN\\_PAKISTAN.pdf](https://www.pips.gov.pk/wp-content/uploads/2024/09/WATER_SCARCITY_AND_WASTAGE_IN_PAKISTAN.pdf)

<sup>98</sup> <https://www.scribd.com/document/898242939/Annual-Report-2023-Oo-CEA-CFFC#:~:text=Sub,15439%20516%2076%20592>

<sup>99</sup> [https://www.pips.gov.pk/wp-content/uploads/2024/09/WATER\\_SCARCITY\\_AND\\_WASTAGE\\_IN\\_PAKISTAN.pdf](https://www.pips.gov.pk/wp-content/uploads/2024/09/WATER_SCARCITY_AND_WASTAGE_IN_PAKISTAN.pdf)

(like Mangla and Tarbela) gave a boost to water storage capacity, but little addition has been made since then.

#### 4. Water Wastage Statistics 2025

- a. Total expected discharge to sea in **2 months of monsoon (July–August) is approximately 14 MAF**, which is more than the existing storage capacity of Pakistan.
- b. With the filling of the available reservoirs, the escapage below Kotri into the **Arabian Sea since 1 July 2025 has reached 9.04 MAF**. However, heavy rainfall in Swat, Kashmir, and other regions continues to feed the river system and is **expected to discharge an additional 4-5 MAF into the Arabian Sea** over the next 10 days, taking the **cumulative amount to 14 MAF**.

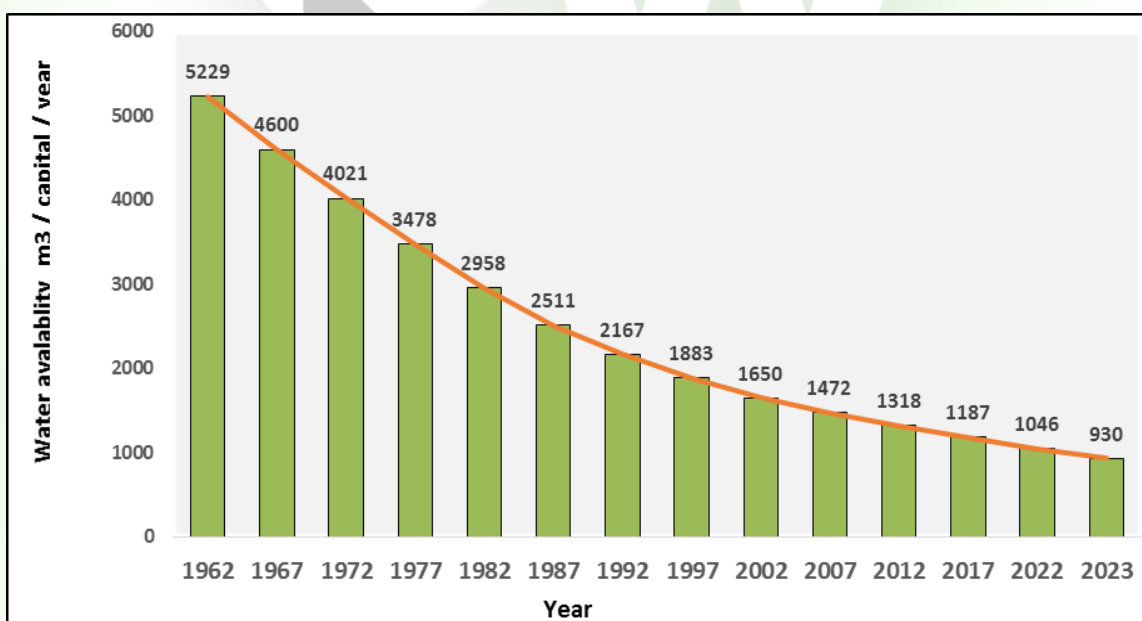
#### 5. Need for Construction of Dams

- a. With a heavily water-dependent agricultural sector, the implications of dwindling water supplies for food production are both immediate and severe.
- b. Likewise, incentivizing rainwater harvesting and watershed rehabilitation would help capture surplus water and water from rainfall to recharge re-charge aquifers rather than letting precious water simply flow out to sea. Expanding the country's water storage capacity (through both large dams and small local reservoirs) is crucial to buffer against seasonal variability; Pakistan cannot afford to remain a country that runs on a month's worth of water.
- c. **Pakistan's total arable land accounts for 30.93 Mha** (76.43 mn acres), of which **24.16 Mha (59.70 mn acres) is cultivable**, while **waste area is 8.19 Mha** (20.24 mn acres).
- d. In the year 2023, the **estimated area cultivated for wheat was 9040.5K hectares, and the estimated yield was 28175.5K tons**.
- e. If the water currently discharged to the sea is utilized, agricultural output could be substantially enhanced. For example, **saving just 1 MAF of water can irrigate 877,000 acres of wheat**.
- f. **Utilizing 14 MAF of presently wasted water could bring 12.2 mn acres of the 20 mn acres wasteland under cultivation, generating produce valued at \$4.263 bn even with minimum yield i.e. 1 ton/ acre; with maximum yield (2.8 ton/acre) the produce will be valued at \$12 bn**.
- g. In Pakistan, the population-to-dam ratio is alarmingly low. According to a report by the **Paris-based International Commission on Large Dams**, dams serve

as major infrastructures used by countries around the world to meet growing water demands, top 11 of these countries are placed at **Figure:41**.<sup>100</sup>

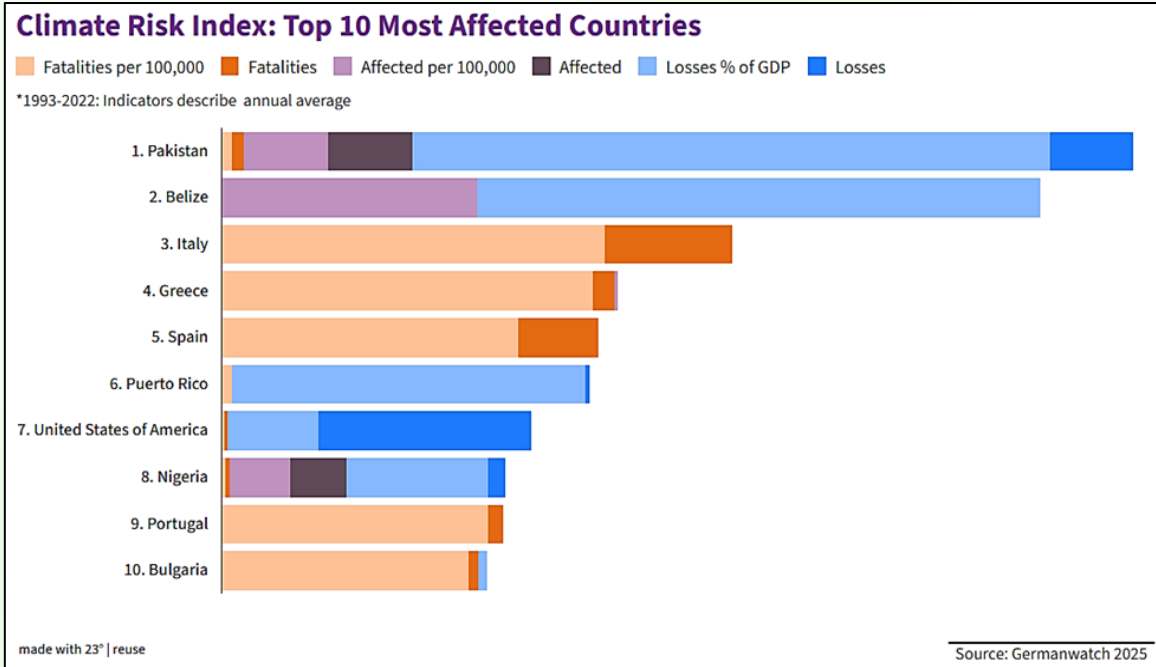
- h. The expansion of water storage capacity is thus indispensable, as **national potential cannot be realized merely by conserving the 14 MAF presently lost to the sea, which will require ~170 dams of the size of Kurram Tangi Dam (0.084MAF); rather, additional water resources and storage infrastructure are required to irrigate the remaining 7.8 mn acres of uncultivated wasteland** to achieve the country's full agricultural potential.

6. **Conclusion.** Pakistan's water crisis is no longer an impending threat - it is an unfolding reality. The country's survival hinges not on managing scarcity alone, but on transforming its approach to water as a strategic asset. For a nation shaped by rivers and reliant on agriculture, the absence of adequate storage is a structural fragility that cannot be ignored. What is needed now is not incremental reform, but a generational shift in priorities - where building and sustaining water infrastructure becomes central to national planning. To secure its food, economy, and sovereignty, Pakistan must invest not just in dams, but in its own resilience.



**Figure:36 – Year wise Declining Water Availability**

<sup>100</sup> [https://www.icold-cigb.org/article/GB/world\\_register/general\\_synthesis/number-of-dams-by-country](https://www.icold-cigb.org/article/GB/world_register/general_synthesis/number-of-dams-by-country)



**Figure:37 – Climate Change Index**

Country	Water Storage Capacity (m <sup>3</sup> /capita/year)
Australia	Over 5,000
USA	Over 5,000
Egypt	23,00
China	22,00
Turkey	14,02
Iran	492
Pakistan	159

**Figure:38 – Water Storage Capacity of Different Countries**

**Table 2.1: Province/Agency Wise Summary of Dams in Pakistan\***

Territory	Completed						On-going (No.)	Proposed (No.)	Total (No.)
	Large Dams^		Small/ Medium Dams		Total				
	No.	Gross Capacity (MAF)	No.	Gross Capacity (MAF)	No.	Gross Capacity (MAF)			
Punjab	71	0.66288	3	0.00478	74	0.667658	05	02	07
Sindh	08	0.21625	80	0.18190	88	0.398190	39	07	46
Khyber Pakhtunkhwa	25	0.18280	02	0.00246	27	0.185264	15	20	35
Balochistan	159	0.73791	441	0.15745	600	0.882998	454	-	454
Merged Areas	19	0.11733	-		19	0.117333	-	-	00
Aj &K	-		-				-	34	34
<b>Sub-Total</b>	<b>282</b>	<b>1.91718</b>	<b>526</b>	<b>0.33422</b>	<b>808</b>	<b>2.251411</b>	<b>513</b>	<b>63</b>	<b>576</b>
WAPDA's Mega Dams	8	18.90295	-	-	8	18.902946	3	13	16
<b>Grand Total</b>	<b>290</b>	<b>20.82020</b>	<b>526</b>	<b>0.34659</b>	<b>816</b>	<b>21.15439</b>	<b>516</b>	<b>76</b>	<b>592</b>

\* It includes total number of completed, ongoing and proposed dams in Pakistan

**Figure:39 – Province Wise Dams (Completed / under construction)**

Country	Formulation of 1 <sup>st</sup> water policy	Capacity to store water for
Pakistan	2018 (40 years after India)	30 days
India	1978	190 days
USA	1948 amended in 1972	900 days
Egypt	1975	1,000 days
China	1988	Several years

**Figure:40 – Water Policy / Storage Capacity of Different Countries**

Country	Number
China	24 207
United States of America	10 126
India	4 488
Japan	3 178
Türkiye	1 903
Korea (Rep. of)	1 502
Canada	1 428
South Africa	1 409
Brazil	1 196
Mexico	1 106
Spain	1 050

**Figure:41 – Population to Dam Ratio (Country wise)**



POLICY WIRE

**THANK YOU!**