



Weekly



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NIPP wishes
its readers



A Happy New Year!

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Policy Nuggets

OVERVIEW



This week's *Policy Pulse* presents Pakistan grappling with profound structural reforms across governance, economy, and diplomacy, while simultaneously confronting demographic and climatic vulnerabilities. The thematic coverage reveals a tension between proactive, technology-driven modernization, seen in telecom policy and digital identity reforms, and reactive measures for navigating complex geopolitical realignments.

The analysis underscores that Pakistan's foundational challenges are deeply interlinked. The telecom industry's demand for a rational spectrum auction policy is not merely a sectoral issue but a structural bottleneck for the digital economy. This long-term strategic imperative contrasts sharply with the immediate economic crisis highlighted by a 20% plunge in exports, which threatens foreign exchange reserves and underscores deepening competitiveness issues. Concurrently, Pakistan becoming the world's fifth-most populous country amplifies pressure on all resources. Integration of population dynamics into climate-resilient projects, like those signed with the ADB, calls for an urgent national priority. In governance, initiatives from heritage surveys to cybercrime crackdowns illustrate a patchwork attempt to strengthen institutional capacity that are often hampered by enforcement gaps.

The Policy Nuggets collectively frame a strategic, yet challenging, push toward national self-reliance and systemic resilience. They advocate for foundational shifts by achieving vaccine self-sufficiency and establishing digital governance for energy imports. It aims at reducing foreign dependence and conserving vital foreign exchange. These systemic efforts exist alongside local regulations e.g. open court initiative or Punjab regulations for Basant; highlighting persistent disconnect between strategic planning and on-ground execution. On the diplomatic level, Pakistan navigates a symbolic thaw with India comprehensively battling concerns for energy, water and food security.

Ultimately, this *Policy Pulse* provides a comprehensive view of a state at a critical juncture, where the success of its digital and demographic governance will fundamentally determine its resilience against relentless economic pressures in an increasingly unpredictable world order.

Pakistan is at a turning point where fixing deep economic and governance problems is essential for coping with economic stress and an uncertain global environment.

GOVERNANCE

T elecom industry demands rational spectrum auction policy



Pakistan's telecom industry has urged the government to adopt a rational spectrum auction policy that reflects the sector's economic realities and prioritises long-term digital growth over short-term revenue. Operators highlight severe spectrum scarcity, low average return per unit, and weak connectivity as major constraints on innovation, financial inclusion, and digital services. The government plans to release over 600 MHz of new spectrum, while Zong and Huawei have successfully tested high-capacity backhaul technology ahead of 5G rollout.

Analysis:

The current spectrum policy acts as a structural bottleneck for Pakistan's digital economy, linking poor auction design to slower GDP growth, job losses, and weaker exports. Telecom firms' demand for rupee-denominated pricing and pragmatic rollout obligations reflects financial sustainability concerns in a low-revenue market. The Zong-Huawei test shows technological readiness, but policy alignment will be decisive in translating capacity into inclusive economic and digital gains.

Way Forward:

- Structure spectrum pricing and payment terms in Pakistani rupees to reduce financial stress on operators and enable sustained investment.
- Align auction design with objectives of digital inclusion, fintech expansion, etc., and treat spectrum as a productive national asset rather than a one-off fiscal tool.
- Complement spectrum reforms with support for advanced backhaul technologies to ensure 5G networks can deliver reliable services nationwide.

S indh govt plans province-wide survey of heritage buildings



The Sindh government plans to conduct a province-wide survey of heritage buildings to update records, assess the condition of existing protected sites, and identify new heritage properties. The decision was taken by the Advisory Committee on Cultural Heritage to strengthen conservation, documentation, and legal protection of Sindh's architectural legacy. The last survey conducted in 2017 had designated 3,371 structures as protected.

Analysis:

The initiative reflects recognition that outdated data and weak enforcement undermine heritage preservation in Sindh. Updating the inventory, involving technical experts, and tightening laws can improve institutional capacity and curb illegal alterations and encroachments. Effective implementation will determine whether the survey translates into real protection rather than remaining a documentation exercise.

Way Forward:

- Integrate private-sector heritage experts, architects, and conservation specialists into the technical committee to improve decision-making and oversight.
- Allocate dedicated provincial funds and explore public-private partnerships for restoration and long-term maintenance of heritage properties.
- Make heritage protection laws more stringent, with clear penalties and faster action against illegal alterations, encroachments, and demolition.

GOVERNANCE

Punjab CCD set to target online fraud network



Punjab's Crime Control Department (CCD) is set to launch province-wide operations against online fraud and cybercrime networks following approval under the Police Order (Amendment) Act 2025. The crackdown will target technology-enabled financial crimes such as fake apps, phishing, online scams, and digital harassment. Specialised CCD units equipped with digital forensics and surveillance tools will lead investigations and asset recovery efforts.

Analysis:

The move reflects a strategic shift in Punjab's policing to address organised crime increasingly driven by digital technologies. By granting CCD clear legal authority under Article 18C, the government aims to close enforcement gaps in cyber and financial crimes. Its success will depend on effective coordination with banks, tech firms, and public awareness to prevent fraud alongside enforcement.

Way Forward:

- Collaborate with banks, fintech companies, internet service providers, and technology platforms to track, freeze, and recover stolen assets quickly.
- Expand CCD's digital forensics capabilities, train personnel in high-tech investigations, and maintain rapid-response teams for emerging cyber threats.
- Establish a province-wide cybercrime monitoring system to detect new fraudulent platforms, phishing attacks, and evolving digital criminal tactics.

Rules tweaked to use facial, iris scans as ID biometrics



The federal government has amended the National Identity Card Rules to expand the legal definition of biometric identifiers to include facial and iris scans alongside fingerprints, enabling contactless biometric verification. From January 20, 2026, NADRA will issue facial recognition-based biometric verification certificates for cases where fingerprint verification fails, and institutions will gradually incorporate these methods into services like banking, telecom, vehicle transfers, and passport applications.

Analysis:

The change modernizes Pakistan's identity verification infrastructure and addresses practical challenges like faded fingerprints, but its effectiveness will depend heavily on timely technological upgrades by public and private institutions and robust privacy safeguards.

Way Forward:

- Ensure quick adoption of facial and iris scan technology in banks, telecom companies, and government offices.
- Ensure that strong laws are in place to protect people's biometric data from misuse.
- Raise awareness by informing people about the new biometric methods and how to use them.

SOCIO-ECONOMIC ISSUES

Pakistan to enter 2026 as fifth-most populous country



According to The United Nations Population Fund (UNFPA), Pakistan enters 2026 as the world's fifth-most populous country, with over 225 million people. High population growth, persistent gender inequality, and climate vulnerability highlight the need for population-focused planning. The UNFPA recommends linking national and provincial fiscal policies to measurable human development outcomes, including gender equality, health, education, and climate resilience. Challenges such as maternal mortality, early marriages, and limited reproductive health access remain pressing.

Analysis:

The report frames population as a strategic asset rather than a burden, emphasizing evidence-based policy and fiscal incentives to promote sustainable development. Addressing gender inequality, reproductive health, and climate resilience is key to reducing fertility rates and improving human development outcomes. Effective implementation requires accountability, domestic financing, and integration of population data into national and provincial planning frameworks.

Way Forward:

- Address early marriages, gender-based violence, and unequal educational opportunities to improve women's participation in social and economic development.
- Incorporate environmental vulnerability into planning, linking population growth and settlement patterns to sustainable resource use and disaster preparedness.
- Align population data with development strategies, ensuring policies consider fertility trends, demographic shifts, and regional population distribution.

Pakistan, ADB ink two climate resilience initiatives worth over \$300m



Pakistan and the Asian Development Bank (ADB) signed two major climate resilience projects worth over \$300 million: the \$180.5 million Sindh Coastal Resilience Project and the \$124 million Punjab Climate Resilient and Low Carbon Agriculture Mechanisation Project. The Sindh project focuses on coastal protection, flood risk management, and community capacity building, benefiting over 3.8 million people. The Punjab project aims to modernize agriculture, promote climate-smart practices, reduce emissions, and empower 15,000 women through skills development.

Analysis:

These initiatives demonstrate Pakistan's commitment to climate adaptation, sustainable agriculture, and inclusive development. Strategic financing from ADB, the Green Climate Fund, and provincial governments', ensures both environmental and socio-economic impacts. By protecting coastal livelihoods, enhancing agricultural resilience, and promoting low-carbon practices, the projects align with Pakistan's broader climate and development goals while fostering gender empowerment and community participation.

Way Forward:

- Establish robust monitoring and evaluation mechanisms to track progress, ensure proper fund utilization, and complete both projects on schedule.
- Provide skills development, livelihood diversification, and access to agricultural resources for at least 15,000 women to promote inclusive economic growth.
- Encourage collaboration with private sector actors to scale low-carbon agriculture and innovative coastal protection solutions.

SOCIO- ECONOMIC ISSUES

FBR assures safeguards for tax-free Gilgit-Baltistan imports



The FBR announced safeguards for tax-free imports to Gilgit-Baltistan (GB), ensuring that goods brought through Sost Dry Port remain exempt from sales tax, income tax, and federal excise duty, while customs duties still apply. An annual Rs4 billion cap has been set, with individual quotas assigned to traders and monitored via the Web-Based One Customs (WeBOC) system. Violations will result in penalties, including quota cancellation and confiscation, to prevent misuse and protect national revenue.

Analysis:

The measures balance supporting GB's economic needs with protecting fair trade and national revenue. Automated tracking and quota limits reduce the risk of abuse, while clear penalties ensure compliance. This approach strengthens regional development while maintaining equity for traders across Pakistan and ensures transparency in tax-exempt import management.

Way Forward:

- Collaborate with GB authorities and customs officials to monitor movement and block any attempts to sell or transport exempt goods outside the region.
- Enforce measures such as quota cancellation, confiscation of misused goods, and reduction of the overall exemption limit to deter non-compliance.
- Publish periodic reports on tax-free import allocations, usage, and compliance to ensure transparency for traders and stakeholders.

Exports plunge over 20pc in December



According to Pakistan Bureau of Statistics data, Pakistan's merchandise exports fell sharply by 20.41% in December 2025, dropping to \$2.317 billion from \$2.911 billion in the same month last year. This marked December 2025 as the fifth consecutive month of decline in export earnings. Meanwhile, imports rose modestly to 2% to \$6.022bn in December 2025 from \$5.904bn over the corresponding month of last year. This pushed the trade deficit to \$3.705bn in December 2025 from \$2.993bn over the corresponding month of last year.

Analysis:

The sustained export slump highlights deepening structural issues in Pakistan's external sector, including weak global demand and high domestic costs, which are undermining export competitiveness. Without targeted economic policy responses, the widening trade gap could exert pressure on foreign exchange reserves and economic stability.

Way Forward:

- The government should support and incentivize important industries like textiles and agriculture to make them more competitive internationally.
- The government should expand markets and products to increase export competitiveness and boost foreign exchange.
- The government should improve ports, transport, and reduce red tape so exporters can sell goods faster and cheaper.

INTERNATIONAL AFFAIRS

Pakistan asks world to take notice of violence against minorities in India



Pakistan urged the international community to take notice of violence against minorities in India, citing attacks on Christians during Christmas and persecution of Muslims, including demolitions and lynchings. The Foreign Office highlighted documented cases of intolerance and called for global action to protect vulnerable communities. India rejected the allegations, pointing to Pakistan's own record on minority rights. Separately, Pakistan prepared for the Prime Minister's participation in the 56th World Economic Forum (WEF) Annual Meeting in Davos to engage global leaders on economic and bilateral issues.

Analysis:

Pakistan's statements signal its efforts to raise concerns about minority rights in India on an international platform. India's rejection reflects persistent bilateral tensions and differing narratives regarding religious freedom. The Foreign Office's move also aligns with Pakistan's broader diplomatic preparations ahead of the WEF, emphasizing both human rights advocacy and engagement with global economic and political leadership.

Way Forward:

- Proactively approach the UN and relevant international organizations to urge monitoring, reporting, and protective measures for minorities in India.
- Emphasize that protection of minority communities is crucial for long-term peace, social cohesion, and regional stability.
- Utilize platforms like the WEF Annual Meeting to discuss minority rights alongside economic and trade dialogues, ensuring Pakistan's stance is recognized in global policymaking circles.

Winners and losers of Trump's new foreign policy



During Trump's second term, countries like China, Saudi Arabia, Syria, Argentina, and Pakistan benefited from transactional diplomacy, trade deals, sanctions relief, and direct engagement with the US administration. Conversely, Venezuela, Iran, South Africa, Canada, and India faced increased pressure through sanctions, tariffs, military threats, and strained relations. Pakistan's improved standing with the US coincided with worsening US-India ties despite ongoing defence cooperation.

Analysis:

Trump's foreign policy favoured countries that aligned with his personal or transactional interests, rewarding compliance and strategic cooperation while penalizing perceived adversaries. The approach emphasized leverage, quick wins, and personal diplomacy over long-term institutional consistency. Pakistan emerged as a key beneficiary, leveraging security cooperation and strategic alignment, whereas regional rivals like India and Iran faced economic and geopolitical setbacks.

Way Forward:

- Maintain strong communication channels with key US leaders and diplomats to ensure Pakistan's strategic contributions, such as counterterrorism cooperation, are recognized and rewarded.
- Highlight Pakistan's role in regional stability, particularly in Afghanistan and South Asia, to strengthen its position in US policy priorities and secure continued military and economic support.
- Navigate US-India tensions by positioning Pakistan as a reliable partner without escalating conflicts.

INTERNATIONAL AFFAIRS

P M meets UAE president in Rahim Yar Khan, Dar phones Saudi FM



PM Shehbaz Sharif met UAE President Sheikh Mohamed bin Zayed in Rahim Yar Khan to strengthen bilateral ties, focusing on trade, IT, energy, minerals, and defence cooperation. The meeting highlighted Pakistan-UAE economic partnership, appreciation for the UAE hosting 2.1 million Pakistanis, and ongoing strategic dialogue. Separately, Deputy Prime Minister and Foreign Minister Ishaq Dar spoke with Saudi FM Prince Faisal bin Farhan to discuss regional developments and reaffirm bilateral relations.

Analysis:

The engagements reflect Pakistan's proactive diplomacy with Gulf partners to enhance economic, trade, and strategic cooperation. Highlighting diaspora contributions and shared regional interests strengthens goodwill and long-term partnership. These discussions also demonstrate Pakistan's focus on leveraging leadership-level interactions for broad bilateral collaboration while maintaining stability and alignment with key regional players.

Way Forward:

- Pursue initiatives to achieve a "quantum jump" in bilateral trade, focusing on sectors like IT, energy, minerals, and industrial cooperation.
- Maintain active dialogue with Saudi Arabia and other Gulf states on regional stability, economic cooperation, and security developments.
- Establish dedicated joint working groups to monitor trade, investment, and defence initiatives to ensure agreements are implemented effectively.

Pakistan condemns unlawful recognition of Somaliland by Israel



Pakistan condemned Israel's unilateral recognition of Somaliland, reaffirming support for Somalia's sovereignty, unity, and territorial integrity. The Foreign Office highlighted that the move violates international law, risks regional stability in the Horn of Africa, and could be linked to attempts to relocate Palestinians from Gaza. Pakistan, along with Organization of Islamic Countries (OIC) members, called on the UN and international community to reject actions undermining Somalia's territorial integrity.

Analysis:

The stance underscores Pakistan's commitment to upholding international law, supporting African and Muslim-majority countries, and opposing unilateral acts that threaten regional peace. By aligning with OIC and Somalia, Pakistan emphasizes the importance of collective diplomacy to prevent destabilization and protect both Somali sovereignty and Palestinian rights. This also positions Pakistan as a principled actor in multilateral forums like the UN.

Way Forward:

- Ensure that any plans involving relocation of Palestinians from Gaza are firmly opposed, linking Somalia's territorial concerns with broader human rights and regional stability.
- Emphasize Pakistan's commitment to protecting both Palestinian rights and Somali sovereignty, projecting itself as a defender of justice and regional stability.
- Work closely with OIC member states and like-minded countries to present a unified position against actions that violate international law and the UN Charter.

INTERNATIONAL AFFAIRS

‘First high-level contact since May standoff’: Indian FM shakes hands with NA speaker at Khaleda Zia’s funeral



At the funeral of former Bangladeshi PM Khaleda Zia in Dhaka on December 31, 2025, Indian External Affairs Minister S. Jaishankar approached and shook hands with the National Assembly Speaker Sardar Ayaz Sadiq, marking the first high-level contact between senior Pakistani and Indian officials since tensions escalated earlier in 2025. The brief exchange, conducted on the sidelines of condolence events, was seen as a diplomatic gesture amid otherwise frozen bilateral relations following a military confrontation in May 2025.

Analysis:

While largely symbolic and informal, this handshake represents a rare moment of cordiality between the two neighbouring countries after months of hostility. It may signal a minimal opening for diplomatic engagement, though substantive dialogue on key conflicts remains absent.

Way Forward:

- Pakistan can build on this small gesture by seeking more informal, low-risk contacts with Indian counterparts at regional events to slowly rebuild communication channels without compromising national interests.
- Use moments like these to push for structured talks on key issues so that symbolic contacts lead to real de-escalation.
- The government should inform citizens about the purpose and limits of such interactions to manage expectations and show that peace efforts are part of a balanced strategy.

Pakistan hopes for diplomatic end to Yemen standoff



The Foreign Office has stated that Islamabad is actively pushing for a diplomatic resolution to the standoff in Yemen, engaging both Saudi Arabia and the UAE to encourage restraint and peaceful dialogue amid rising regional tensions. Pakistan has reiterated its support for Yemen’s unity and territorial integrity and is advocating a negotiated, peaceful settlement of the conflict rather than escalation.

Analysis:

This diplomatic effort reflects Pakistan’s attempt to balance its close ties with both Gulf allies while avoiding direct involvement in the Yemeni conflict, positioning itself as a mediator for peace. However, success will depend on sustained engagement and the willingness of all regional stakeholders to commit to dialogue.

Way Forward:

- Pakistan should continue active dialogue with Saudi Arabia, the UAE, and other regional partners to encourage and support peace negotiations in Yemen.
- Pakistan should leverage multilateral forums such as OIC to advocate for inclusive talks and to help build international pressure for a negotiated settlement.
- Pakistan should promote humanitarian support and advocate protection for civilians, reinforcing its role as a responsible regional actor committed to regional stability.

INTERNATIONAL AFFAIRS

M aduro now in New York jail as Trump says US to 'run' Venezuela



Venezuelan President Nicolás Maduro and his wife were captured by US special forces in a military operation and flown to New York, where Maduro is being held in custody and is expected to be arraigned on drug-trafficking and weapons charges. US President Donald Trump said the US would temporarily oversee Venezuela's governance until a "safe, proper and judicious" transition could be arranged, even suggesting US involvement in the country's oil sector.

Analysis:

The US's direct intervention in Venezuela's internal affairs is likely to spark major geopolitical controversy and legal debate over sovereignty and international law. Regional and global actors may react strongly, potentially influencing alignments and tensions across Latin America and beyond.

Way Forward:

- Pakistan should watch how this situation affects global rules and support respect for country sovereignty.
- Pakistan should keep good relations with the US while also working with other countries to avoid regional tensions.
- Pakistan should encourage the UN and other groups to help Venezuela resolve its issues through dialogue, not force.

T rump 'threatens' Mexico, Cuba, Colombia next



US President Donald Trump issued stern warnings to the leaders of Colombia, Mexico, and Cuba following a US military operation that captured Venezuelan President Nicolás Maduro, suggesting that Washington may extend pressure or intervention to these countries next. Trump accused Colombian President Gustavo Petro of facilitating drug trafficking, claimed Mexico is dominated by cartels, and described Cuba as a "failing nation" that might face increased US scrutiny.

Analysis:

Trump's rhetoric marks a sharp escalation in US foreign policy toward Latin America, signaling a potential shift from diplomatic engagement to coercive pressure that could heighten geopolitical tensions in the region. Such posturing risks undermining regional stability and could provoke backlash from sovereign governments, complicating international relations.

Way Forward:

- Pakistan should closely observe US foreign policy changes and assess any indirect impact on its own relations and regional stability.
- Pakistan should consistently advocate dialogue, sovereignty, and international law through the UN and other forums.
- Pakistan must continue engaging with all major global powers to protect its economic and strategic interests.

POLICY NUGGETS

1 Pakistan's privatization drive

Impact

Shift toward fiscal consolidation, market efficiency, and reduced state footprint in commercial sectors.

Recommendation

Regulatory strengthening, competitive bidding, and clear performance benchmarks to ensure service quality and consumer protection.

"Privatisation is not an end in itself; it is a means to better governance." – Margaret Thatcher

2 Punjab notifies regulations for Basant

Impact

Manufacturers and traders must hold valid digital registration as per the Punjab Regulation of Kite Flying Rules 2025.

Recommendation

Ensure widespread awareness of new regulations, provide registration facilities at Khidmat Markez, and regulate police forces for implementation and accountability. *"It is the day when the dhol beats in the heart and the kite tugs at the soul."* – Amrita Pritam

3 NDMA's out winter contingency plan for northern areas

Impact

Better coordination and preparedness for efficient response.

Recommendation

Coordinate with travel agencies for strategic communication and controlled tourist flow into northern areas. Provide weather updates on sim to tourists and residents.

"The time to repair the roof is when the sun is shining." – John F. Kennedy

4 Pakistan's population challenge: Policy choices for inclusive growth

Impact

Intensifies fiscal, social, and climate pressures, exposing gaps in how population dynamics are integrated into national planning.

Recommendation

Institutionalise data-driven population planning through CCI-backed implementation frameworks with clear timelines, accountability mechanisms, and sustained domestic financing.

"The real wealth of a nation lies in the capabilities of its people." – Amartya Sen

5 Towards vaccine self-sufficiency

Impact

Marks a strategic shift from import dependence toward phased domestic manufacturing and long-term health system resilience.

Recommendation

Establish the National Vaccine Alliance with binding procurement guarantees, regulatory reforms, and time-bound technology transfer, and align long-term contracts with WHO prequalification pathways. *"Self-reliance is the foundation of national strength."* – Deng Xiaoping

6 Pakistan asks India to respond to queries on Indus Waters Treaty

Impact

Construction of Dulhasti State-II Hydroelectric Project on Chenab River to affect downstream water flow.

Recommendation

Build international pressure on India to respond and resort to IWT regulations. Embassies should raise awareness internationally on Indian aggression.

"Thousands have lived without love, not one without water." – W.H. Auden

7 Energy self-reliance through domestic exploration and digital governance

Impact

Reduces import dependence and conserves foreign exchange; Strengthens supply and curbs fuel smuggling.

Recommendation

Institutionalize end-to-end digital tracking across oil and gas imports, distribution, and consumption to sustain revenue protection and governance gains.

"Energy independence is a cornerstone of national security" – Dwight D. Eisenhower

8 KP CM launches introduces open court initiative

Impact

Ensures direct and prompt redressal of citizens' complaints.

Recommendation

Should be adopted by all provinces and can be integrated with safe city authorities for security related cases. *"Justice delayed is justice denied."* – William E. Gladstone

9 'Drone swarms test KP police limits'

Impact

Militants' use of drones fatigue KP police.

Recommendation

Police departments need to be provided with training on modern military technology and to defend while simultaneously crackdown on supply chains. *"The revolution in military affairs is not about technology; it's about how you organize, think, and fight with that technology."* – General James Mattis



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