



Weekly



# POLICY PULSE

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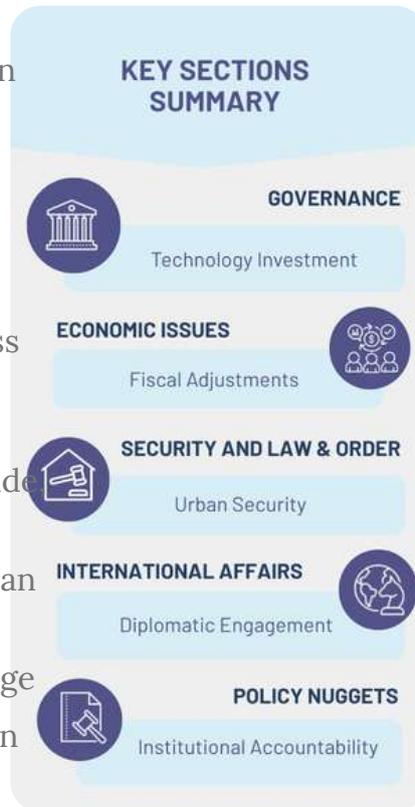
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## Policy Nuggets

# OVERVIEW

This week's *Policy Pulse* reflects a reform-oriented but fiscally constrained policy environment, marked by technological ambition, economic recalibration, institutional restructuring, and active diplomacy. Across sectors, the state appears focused on structural modernization while managing financial pressures and geopolitical uncertainty.

In governance and economic policy, the announced \$1 billion AI investment signals a strategic shift toward technology-led growth, linking education, research, and productivity with long-term competitiveness. Sindh's measures such as traffic courts, digital property systems, and forest expansion, illustrate administrative digitization combined with environmental priorities. Economic adjustments also reflect evolving policy trade-offs: transitioning from net metering to net billing seeks to stabilise the power sector while reshaping rooftop solar incentives; tax data highlights the significant contribution of the salaried class; and the NHA's financial pressures point to areas for continued fiscal reform. Gwadar's planned transformation and the UAE's financial rollover reflect parallel efforts to spur growth while stabilizing external accounts.

On security, Islamabad's technology-driven safety strategy and the operationalization of a CTD unit in Gilgit-Baltistan indicate movement toward preventive and coordinated counter-terrorism. Internationally, Pakistan's positions on Palestine, engagement with UN-Habitat, evolving regional trade arrangements, and calls to recalibrate Kashmir policy underscore a balancing act between principled diplomacy and economic pragmatism in a shifting global order.

The Policy Nuggets sharpen these themes by underscoring accountability in counter-terrorism policy, the need for measurable anti-corruption outcomes beyond perception management, expansion of domestic vaccine production for health sovereignty, and coordinated housing reforms with climate resilience. They further stress diaspora regulation, gender-inclusive leadership, and regional security cooperation, collectively emphasizing that durable reform depends on institutional discipline, transparency, and implementation capacity.

In conclusion, this week's developments indicate that Pakistan's principal policy challenge lies in converting broad structural reform commitments into tangible, measurable outcomes within the limits imposed by fiscal pressures and institutional capacity constraints.



**Pakistan is pushing for technology-driven structural reforms and institutional modernization amidst fiscal constraints, security recalibration, and carefully balanced diplomacy.**

# GOVERNANCE

## G

### ovt to invest \$1bn in AI by 2030: PM



PM Shehbaz Sharif announced that Pakistan will invest \$1 billion in artificial intelligence by 2030 to build a national AI ecosystem. The plan includes introducing AI curriculum in schools, awarding 1,000 fully funded PhD scholarships, and training one million non-IT professionals. The government aims to deploy AI in agriculture, mines and minerals, and youth empowerment while strengthening digital governance reforms. The initiative was unveiled at the inauguration of Indus AI Week 2026.

#### Analysis:

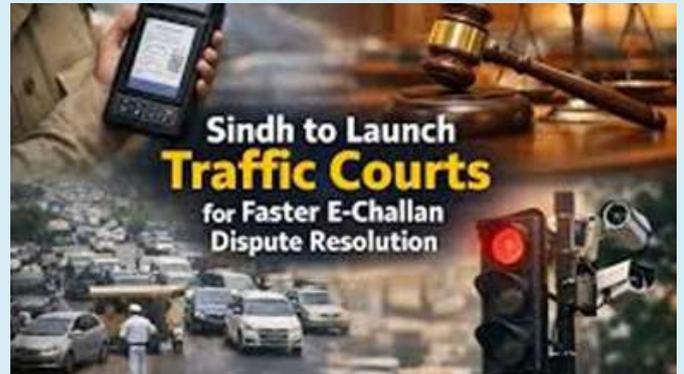
The announcement signals a strategic shift toward technology-driven governance and economic modernization. By linking AI with education, research, and productivity sectors, the policy aims to enhance competitiveness and revenue efficiency. However, successful implementation will depend on institutional capacity, funding continuity, and public-private collaboration. If executed effectively, it could significantly reshape Pakistan's digital and economic landscape.

#### Way Forward:

- Ensure transparent funding & monitoring mechanisms for the \$1 billion investment through independent oversight, measurable targets, and annual progress reporting.
- Encourage research & innovation ecosystems through fully equipped AI research centers and international academic collaboration.
- Link AI strategy with economic policy to align digital transformation with export growth, productivity enhancement, and sustainable development goals.

## T

### raffic courts to be established in Sindh for swift disposal of e-challan cases



Sindh plans to convert existing consumer courts into traffic courts for swift handling of e-challan cases, pending High Court approval. The Red Line BRT project will use 18 acres of former Aladdin Park for an at-grade bus depot to cut costs and speed construction. Digital property registration for overseas Pakistanis will be enhanced via an integrated e-Registration system, and the provincial e-stamping system will transition to SITC. Additionally, 163,902 hectares in Sujawal were declared protected forests to boost environmental conservation.

#### Analysis:

These measures reflect Sindh's approach to improving governance through judicial efficiency, cost-effective infrastructure planning, and digital innovation. The province is also prioritizing environmental sustainability by expanding protected forests, indicating a coordinated strategy to balance urban development, technological adoption, and climate resilience.

#### Way Forward:

- Balance urban growth with environmental protection and efficient law enforcement.
- Upgrade e-stamping system with mobile applications, paperless processing, and integration with CNICs.
- Expand protected forests by 163,902 hectares in Sujawal to strengthen climate resilience.

# ECONOMIC ISSUES

## Govt ends net metering, shifts rooftop solar to net billing



Pakistan has replaced its net metering regime with a net billing system under the Nepra (Prosumer) Regulations, 2026. Utilities will now purchase surplus rooftop solar electricity at the national average purchase price (around Rs11 per unit) while selling power to consumers at standard retail tariffs (often above Rs50 per unit). The reform shortens contract terms, shifts interconnection costs to consumers, and introduces stricter technical limits. The move aims to address revenue losses, tariff distortions, and grid instability caused by rapid rooftop solar expansion.

### Analysis:

The shift prioritizes financial sustainability of the power sector and cost equity for non-solar consumers by ending the one-to-one billing offset. While it may stabilize utility revenues and reduce tariff pressure, it weakens investment incentives for rooftop solar exporters. The policy reflects a balancing act between renewable growth and grid stability. Its long-term impact will depend on tariff adjustments, regulatory consistency, and energy transition commitments.

### Way Forward:

- Introduce a phased implementation plan to protect small-scale and residential solar investors from sudden financial shocks.
- Establish a transparent formula for revising the national average purchase price to reflect market conditions and renewable energy targets.
- Ensure the net billing regime supports Pakistan's long-term renewable energy targets and international climate obligations.

## Income tax payments: Salaried class outpaces exporters, retailers, property buyers, sellers



In the first seven months of FY26, the salaried class paid Rs315 billion in income tax, surpassing the combined contributions of exporters, retailers, and property buyers/sellers, who paid Rs293 billion. Despite growth in tax collections from all sectors, politically influential segments are contributing less proportionally. The data highlights disparities in tax compliance and underscores challenges ahead for the Finance Ministry and IMF negotiations.

### Analysis:

The figures indicate that Pakistan's tax base relies heavily on the salaried class, while key commercial and property sectors contribute comparatively less, revealing structural inequities in the tax system. Effective enforcement, widening the Active Taxpayer List, and policy reforms are essential to balance the tax burden, enhance revenue collection, and support sustainable fiscal management. This trend may influence IMF discussions and budget planning for 2026-27.

### Way Forward:

- Revise tax structures to reduce reliance on the salaried class while maintaining incentives for voluntary compliance in politically influential sectors.
- Implement audits, penalties, and stricter monitoring for high-value transactions, especially in property and export sectors.
- Monitor high-revenue sectors like real estate, retail, and exports to ensure they contribute proportionally to economic growth and government revenues.

# ECONOMIC ISSUES

## Centre plans to make Gwadar a trade, tourism hub



The federal government plans to transform Gwadar into a hub for trade, tourism, and the blue economy, emphasizing sustainable development, regional connectivity, and youth employment. Key initiatives include operationalizing Gwadar Port, promoting coastal tourism, establishing a shipyard, developing tax-free zones, improving infrastructure and transport links, and completing Gwadar University and Smart City projects. A joint working group will coordinate actionable proposals for the city's holistic development.

### Analysis:

This strategy positions Gwadar as a strategic economic and regional gateway, leveraging public-private partnerships and international investment to boost Pakistan's trade and tourism. It reflects a focus on long-term sustainability, urban planning, and social development, while enhancing Balochistan's integration into national economic growth and global trade networks.

### Way Forward:

- Complete Gwadar Smart City project to integrate modern urban planning and sustainability measures.
- Prioritize employment opportunities for local youth in trade, tourism, and industrial sectors.
- Encourage public-private partnerships (PPP), including international hotel chains, through incentives.

## UAE extends \$2bn lifeline to Pakistan ahead of IMF talks



UAE has agreed in principle to roll over a \$2 billion financial deposit with Pakistan for two months, extending the short-term support just ahead of Pakistan's critical International Monetary Fund (IMF) review talks and the potential release of further funds under its extended program. This rollover comes after earlier short-term extensions and follows ongoing government efforts to secure a stable external financing plan with bilateral partners.

### Analysis:

UAE's continued financial support provides Pakistan with a temporary buffer against imminent funding gaps and enhances Islamabad's negotiating position with the IMF, but the short duration of the rollover highlights persistent external financing vulnerabilities and real pressure on Pakistan's foreign reserves and balance-of-payments situation.

### Way Forward:

- Request friendly countries to extend deposits for longer periods so Pakistan has more financial stability.
- Complete required reforms on time to secure the next loan installment and build international trust.
- Support local industries and boost exports so Pakistan can rely less on foreign loans in the future.

# ECONOMIC ISSUES

## P M unveils Rs38bn Ramazan package



The federal government has unveiled a Rs38 billion Ramazan Relief Package aimed at supporting more than 12 million families (about 36 million people) nationwide, including in the four provinces, Azad Jammu & Kashmir, and Gilgit-Baltistan, with direct cash transfers of Rs13,000 per family through digital wallets and bank accounts. The new system replaces the old utility-store distribution to improve transparency, dignity, and efficiency of assistance delivery.

### Analysis:

Shifting to a cashless digital payment model helps reduce corruption and long queues while empowering recipients with direct financial support, but its success depends on digital infrastructure, banking participation, and effective monitoring to ensure funds reach the intended families.

### Way Forward:

- Expand digital banking and wallet services especially in rural areas so more people can receive funds easily and securely.
- Use helplines and apps to quickly resolve issues and ensure assistance reaches deserving families without delays.
- Inform citizens clearly about how to qualify and receive their payments to avoid confusion and exclusion.

## N HA stays govt's biggest fiscal drain despite higher tolls



The National Highway Authority (NHA) remains the largest fiscal burden on Pakistan's federal budget, posting Rs 2.07 trillion in accumulated losses and running persistent deficits despite doubling toll rates, because its toll revenue is far below its rapidly rising debt servicing and operating costs. Outstanding loans of around Rs 3.1 trillion and high financing costs continue to expose the government to significant credit risk under sovereign guarantees.

### Analysis:

Even with higher tolls, the NHA's revenue growth hasn't kept pace with its debt and depreciation costs, reflecting deep structural inefficiencies; this limits its ability to be self-sustaining and strains public finances.

### Way Forward:

- Pakistan should renegotiate loan terms or convert debt into longer-term or equity-like instruments to lighten annual interest burdens and create fiscal space.
- Strengthen toll enforcement and close gaps in unpaid dues so the NHA actually collects all revenue owed, helping narrow the deficit without raising tolls further.
- Increase public-private partnerships for highway maintenance and service areas to share costs and improve operational efficiency.

# SECURITY AND LAW & ORDER

**S**trategy to be enforced within a week to make Islamabad safest city



The Interior Ministry has directed the implementation of a comprehensive security strategy within seven days to make Islamabad the safest city. Measures include enhanced surveillance at entry and exit points, increased patrolling, Safe City camera monitoring, and closer inter-departmental coordination. Authorities will also digitise and strictly enforce registration of taxis and online ride services, requiring passenger identity verification. The initiative aims to strengthen law and order and prevent crime and terrorism.

## Analysis:

The strategy reflects a technology-driven approach to urban security, combining surveillance, data monitoring, and regulatory enforcement. While it may improve crime detection and public safety, effective implementation will depend on coordination, data management, and oversight mechanisms. Mandatory digital registration of ride services enhances traceability but raises privacy and compliance considerations. Sustained monitoring and institutional accountability will determine its long-term success.

## Way Forward:

- Establish a permanent coordination cell linking police, district administration, intelligence agencies, and transport authorities.
- Shift from reactive patrolling to predictive policing using crime data mapping and risk profiling to prevent incidents before they occur.
- Launch a secure citizen reporting platform to encourage community participation in crime prevention.

**C**TD unit activated in Gilgit Baltistan



The Counter-Terrorism Department (CTD) has been officially made operational in Gilgit-Baltistan, with a dedicated CTD police station established in Gilgit and an initial team of about 250 officers deployed to handle terrorism-related cases across the region. The unit plans to recruit about 600 more personnel this year and will seek training support from Punjab and Khyber Pakhtunkhwa, while already taking on cases like a recent attack on a Frontier Works Organisation vehicle along the Karakoram Highway (KKH). Funding challenges remain, as recurring costs for the new posts are a burden on the resource-strained Gilgit-Baltistan government.

## Analysis:

Activating the CTD in Gilgit-Baltistan strengthens the region's counterterrorism infrastructure and could improve response and investigation capacity, especially along key strategic routes like the KKH, but its effectiveness will depend on sustained funding, training, and integration with local security needs.

## Way Forward:

- The government should give enough regular budget so the CTD in Gilgit-Baltistan can work smoothly.
- Send officers for training in Punjab and KP so they can learn modern investigation and counter-terror skills.
- Build trust with communities so they share information and help prevent terrorism.

# INTERNATIONAL AFFAIRS

**P**akistan, 7 other Muslim states condemn Israeli move to annex West Bank



Pakistan and seven other Muslim countries condemned Israel's measures in the occupied West Bank, labeling them illegal annexation efforts that violate international law and UN resolutions. The statement reaffirmed support for Palestinian self-determination based on the two-state solution, ahead of Pakistan's participation in the Board of Peace meeting in Washington for Gaza reconstruction. Concurrently, Pakistan emphasized strengthening trade relations with the EU under the GSP+ scheme.

## Analysis:

Pakistan's stance highlights active regional diplomacy, advocating Palestinian rights while reinforcing international legal norms. Balancing foreign policy with economic interests, engagement with the EU through GSP+ ensures continued trade benefits and strategic partnerships. The position strengthens Pakistan's credibility in multilateral forums and underscores the link between human rights, regional stability, and economic diplomacy.

## Way Forward:

- Develop a comprehensive foreign policy roadmap linking humanitarian support, diplomatic initiatives, and economic engagement to reinforce Pakistan's leadership in Muslim and international forums.
- Proactively communicate Pakistan's principled foreign policy to counter narratives questioning the country's stance on justice, human rights, and regional stability.
- Leverage platforms such as the UN, ICJ, and the Board of Peace to ensure enforcement of international law and protection of Palestinian sovereignty.

**U**S, Bangladesh make trade deal, White House says



The United States and Bangladesh reached a trade agreement reducing reciprocal tariffs on Bangladeshi imports to 19%, with zero tariffs for certain textile and apparel goods using US cotton and man-made fibers. The deal, following nine months of negotiations, aims to support Bangladesh's export-oriented apparel sector, which accounts for over 80% of export earnings and employs around 4 million workers. This follows earlier US tariff reductions for Bangladesh and similar trade deals with India.

## Analysis:

The agreement strengthens Bangladesh's economic resilience by lowering trade costs for its critical garment industry, boosting competitiveness in the US market. It reflects US strategic use of trade policy to secure market access while promoting domestic inputs like US cotton. The deal also highlights South Asia's growing integration into global trade frameworks and underscores the importance of diplomatic negotiations in enhancing bilateral economic ties.

## Way Forward:

- Track developments in US-Bangladesh and US-India trade agreements to understand tariff reductions and incentives in the textile and apparel sectors.
- Explore opportunities for reciprocal tariff reductions or trade facilitation agreements to secure better access for Pakistani exports.
- Develop a strategic roadmap that aligns Pakistan's textile sector with global market trends, regional trade agreements, and domestic industrial policy.

# INTERNATIONAL AFFAIRS

## UN director, minister agree to promote sustainable urbanisation



Pakistan's Housing Minister Mian Riaz Hussain Pirzada and UN-Habitat Regional Representative Kazuko Ishigaki agreed to strengthen cooperation for sustainable urbanisation and improved housing outcomes. Discussions focused on implementing the National Housing Policy 2025, promoting green building standards, climate-resilient and affordable housing, and leveraging UN technical support for post-flood recovery and policy reforms.

### Analysis:

The collaboration underscores Pakistan's commitment to addressing its housing crisis through policy reform and sustainable urban development. UN-Habitat's technical and strategic support can accelerate green construction, climate resilience, and inclusive urban planning, while effective implementation of the National Housing Policy will be critical to translating policies into tangible outcomes for citizens.

### Way Forward:

- The government emphasizes implementation of the National Housing Policy 2025, focusing on green building standards, affordable housing, and climate-resilient urban infrastructure.
- Post-flood recovery efforts will benefit from UN expertise in urban planning, zoning, and policy reform to build resilient and inclusive communities.
- Incentive-based frameworks will be introduced to encourage sustainable construction practices and bridge affordability gaps for low- and middle-income households.

## Pakistan's food system failing to deliver healthy products: UN



The United Nations, led by FAO and in collaboration with other UN agencies, highlighted that Pakistan's food system provides sufficient calories but lacks nutritious, diverse, and healthy foods. The analysis revealed overreliance on cereals, sugar, and oils, low consumption of fruits, vegetables, pulses, and animal proteins, and rising diet-related diseases, including diabetes and cardiovascular conditions. Experts recommended government incentives, subsidy reallocation, and taxation on sugary products to improve access to nutrient-rich foods and promote healthier diets.

### Analysis:

Pakistan faces a "double burden" of malnutrition undernutrition alongside obesity and NCDs exacerbated by structural imbalances in food production and consumption. Without strategic policy reforms and enforcement of dietary guidelines, public health and economic productivity will remain under strain. Targeted interventions in food subsidies, taxation, and production of nutrient-dense foods are critical to align the food system with national and global nutrition standards.

### Way Forward:

- Link food system reforms with healthcare programs to address malnutrition and diet-related diseases, reducing the economic and social burden of NCDs on Pakistan.
- Launch nationwide campaigns to encourage diverse diets, focusing on reducing sugar, processed foods, and unhealthy fats, while increasing consumption of protein-rich and micronutrient-dense foods.
- Implement educational programs for households, schools, and communities to raise awareness about balanced nutrition and healthy eating habits.

# INTERNATIONAL AFFAIRS

## Pakistan's Kashmir policy need for internal cohesion and diplomatic outreach



At a seminar in Islamabad, Pakistan Ex-Servicemen Society president Senator Lt Gen (ret'd) Abdul Qayyum called for a comprehensive reset of Pakistan's Kashmir policy, arguing that political unity and economic strength should underpin a more proactive approach. He emphasised enhanced diplomatic engagement, the creation of Kashmir-focused desks in key capitals, expanded parliamentary outreach, and greater use of media to highlight alleged human rights concerns. He also urged revitalisation of the role of the United Nations Military Observer Group in India and Pakistan and proposed exploring avenues within the Financial Action Task Force to advance Pakistan's position internationally.

### Analysis:

The remarks reflect a recurring domestic policy debate over recalibrating Pakistan's Kashmir strategy in response to shifting regional geopolitics and evolving diplomatic constraints. The emphasis on internal cohesion and economic resilience underscores a recognition that international influence increasingly correlates with domestic stability and economic capacity. Overall, the discussion highlights the tension between traditional diplomatic narratives and the need for adaptive, institutionally grounded strategies in a changing international environment.

### Way Forward:

- Strengthen internal political consensus and economic stability to support external diplomatic initiatives.
- Enhance sustained, multi-channel diplomatic engagement across multilateral and bilateral platforms.
- Ensure consistent institutional coordination in messaging, outreach, and policy implementation on Kashmir.

## UN warns about Israel's illegal annexation of West Bank



Volker Türk, speaking at the launch of UN Human Rights' 2026 Annual Appeal in Geneva, warned that Israel's policies in the West Bank are illegal and threaten the creation of a Palestine state. He highlighted that allowing Jewish Israelis to directly buy land in the West Bank will expand settlements, increase Israeli control, and accelerate the displacement of Palestinians. He urged Israel to reverse these decisions to protect Palestinian rights and keep the possibility of a two-state solution alive.

### Analysis:

Israel's illegal annexation of areas in the West Bank are motivated by its aims to administer religious sites in the area particularly the Al Aqsa. It also aims to challenge the already weakened Palestinian Authority and render it inefficient in the eyes of the international community. Israel's malicious activities are aimed towards denying Palestinian people's right to self-determination; while also blocking their access to natural resources including water and electricity. Ultimately it reflects Israel's intent to forcefully displace Palestinians by stripping them of their land and forcing them to leave.

### Way Forward:

- Pakistan should voice against and bring to light Israel's demeaning behaviour and should voice for the proper implementation of administration established under the Oslo Accords in the 1990s.
- Pakistan should also volunteer to lead international human rights organizations in the West Bank and Gaza for on ground reporting and transparent research.
- Pakistan should put forward in the Board of Peace an investigation of Israel's illegal settlements.

# POLICY NUGGETS

## 1 Asif highlights prior policy failures behind rising terrorism

### Impact

Admission of past strategic mistakes highlights how flawed policies can create long-term security threats and destabilize national peace.

### Recommendation

Pursue transparent policy making and institutional accountability to prevent past errors from breeding future extremism.

“Those who cannot remember the past are condemned to repeat it.”  
— George Santayana

## 2 Iran signals uranium dilution if sanctions are lifted

### Impact

Conditional willingness to dilute enriched uranium reflects potential diplomatic flexibility while underscoring ongoing global concerns over nuclear proliferation.

### Recommendation

Encourage constructive dialogue, mutual trust-building, and adherence to international nuclear agreements to ensure regional and global security.  
“The World is over-armed and peace is under-funded.” — BAN Ki-moon

## 3 Pakistan targets domestic vaccine production capacity by 2030

### Impact

Strengthening local vaccine production enhances health security, reduces external dependence, and improves preparedness for future pandemics.

### Recommendation

Promote sustained investment, public-private collaboration, and institutional capacity-building to ensure resilient healthcare systems.

“Let us mobilize all our resources in a systematic and organized way and tackle the grave issues that confront us.” — Muhammad Ali Jinnah

## 4 Afghanistan's permissive security is intensifying cross-border militancy

### Impact

Escalated attacks in Pakistan, deepening regional insecurity, while ISIS-K and Al-Qaeda ties signal risks of extra-regional threat.

### Recommendation

Strengthen cyber intelligence, border management, and regional intelligence-sharing frameworks.

“As long as there is poverty and injustice in the world, none of us can truly rest.” — Nelson Mandela

## 5 Pakistan's shift in the Corruption Perceptions Index reflects institutional stagnation

### Impact

Signals persistent governance and accountability deficits, weakening business confidence and rule-of-law enforcement.

### Recommendation

Institutional reforms should move beyond perception management toward measurable anti-corruption outcomes.

“Power tends to corrupt, and absolute power corrupts absolutely.” — Lord Acton

## 6 Pakistan and UN-Habitat deepen collaboration to advance housing reforms

### Impact

Strengthens institutional capacity for climate resilient urban planning and housing recovery.

### Recommendation

Ensure time-bound implementation mechanisms, provincial coordination, and incentive-based financing models.

“The city is not a concrete jungle, it is a human zoo.” — Desmond Morris

## 7 38,600 Pakistanis deported from Gulf states last year

### Impact

Reflects a demeaning image of Pakistan as deported individuals include ‘beggars, thieves and absconders’.

### Recommendation

Pakistani embassies should be vigilant in monitoring diaspora and take action prior to local governments.

“A state that fails to regulate its relationship with its diaspora loses its most valuable external asset.” — Iskander Raza

## 8 Pakistan's large-scale reform push under fiscal constraints

### Impact

Indicates a shift from crisis management toward structural governance reforms, strengthens digital transparency and legal modernisation.

### Recommendation

Link reforms to measurable fiscal and governance outcomes, prioritise implementation tracking and public reporting.

“Reform is not a matter of decree but of execution.” — Peter Drucker

## 9 Pildat reports institutional barriers deny women leadership roles

### Impact

Limits potential and gender perspective in decision making and leadership capacities.

### Recommendation

Professional development should be based on merit to overcome informal power structures.

“When women do better, economies do better. Diversity is not just a matter of social justice; it is a competitive advantage.” — Christine Lagarde



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