



Weekly



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OVERVIEW

This week's *Policy Pulse* reflects a policy landscape shaped by fiscal consolidation, regulatory recalibration, security vigilance, and evolving regional diplomacy. The overarching theme is strategic balancing: sustaining macroeconomic stabilization while addressing structural governance gaps and navigating geopolitical uncertainty.

On the economic front, developments point to cautious recovery alongside persistent reform pressures. Improvements in external account management and continued engagement with multilateral partners indicate efforts to anchor stability, yet revenue mobilization challenges, sectoral imbalances, and energy-sector adjustments highlight the fragility of gains. Regulatory decisions seek to protect consumers while ensuring institutional sustainability, underscoring tensions between short-term relief and long-term reform. Parallel digitization and administrative initiatives signal a governance shift toward transparency and efficiency, contingent on implementation capacity.

Security incidents in sensitive regions reaffirm the persistence of militant threats and the importance of intelligence coordination and border management, with a growing emphasis on preventive, capacity-based approaches. Simultaneously, Pakistan's calibrated diplomatic engagements, through bilateral outreach and multilateral participation, reflect efforts to balance economic priorities with principled foreign policy positions amid instability in the Middle East and other conflict theatres, particularly where energy markets and remittance flows may be affected.

The policy nuggets consolidate these trends by emphasizing fiscal discipline, export competitiveness, institutional accountability, migrant management, and strategic diplomacy grounded in international law and multilateralism.

Overall, the week suggests that Pakistan's central policy challenge lies in converting short-term stabilization into durable structural reform while safeguarding security and external equilibrium through coherent, execution-focused governance.



Pakistan is pursuing a policy landscape shaped by fiscal consolidation, regulatory recalibration, security vigilance, and evolving regional diplomacy. .

GOVERNANCE

FBR will act to curb corruption, IMF assured



The Federal Board of Revenue has assured the International Monetary Fund that it will strengthen its Integrity Management Cell to curb corruption through digitised complaint systems, anonymised reporting, and stricter oversight. An Internal Affairs Unit will be established, and disciplinary actions and penalties will be publicly disclosed. The government also plans to amend the FBR Act 2007 to shift appointment powers from the FBR Chairman to the Revenue Secretary.

Analysis

These reforms aim to improve transparency, accountability, and institutional integrity within Pakistan's tax administration, which is critical for increasing revenue collection. IMF-linked oversight reflects external pressure to ensure governance reforms and reduce corruption. Digitisation and structural changes can enhance efficiency and public trust. However, effective implementation and political consensus will be essential for meaningful long-term impact.

Way Forward

- The Federal Board of Revenue must operationalise the IMC with clear authority, trained staff, and strict timelines to investigate and resolve corruption complaints.
- Strengthen collaboration with institutions like FIA and NAB to ensure swift investigation and prosecution of corruption cases.
- Conduct regular integrity training, performance evaluations, and strict enforcement of discipline rules to promote professionalism and reduce corrupt practices.

MoU signed for digitalised Haj management system



The Ministry of Religious Affairs and Interfaith Harmony and the Ministry of Information Technology and Telecommunication signed an MoU to launch a digitalised Haj management system for 2027. The system will provide an end-to-end digital platform, including an improved Pak Haj mobile app, streamlining applications, scrutiny, and coordination while ensuring transparency, efficiency, and timely information for pilgrims.

Analysis:

The initiative represents a major step in modernising government services through technology, reducing human error, and improving administrative efficiency. By integrating digital tools and user-friendly platforms, Pakistan aims to meet international standards for Haj operations, enhance transparency, and provide a smoother, more convenient experience for pilgrims.

Way Forward

- Establish a centralised system for seamless coordination between the ministries, travel agencies, Saudi authorities, and other stakeholders to maintain strict adherence to timelines and operational standards.
- Digital tracking and monitoring mechanisms will allow authorities to audit processes, reduce corruption or mismanagement, and ensure fairness in pilgrim selection and services.
- Design the system to accommodate increasing numbers of pilgrims in coming years while maintaining efficiency, transparency, and ease of use.

GOVERNANCE

Karachi province' debate spills into upper house



A heated debate erupted in the Senate over proposals to create a separate "Karachi province." PPP senators forcefully rejected any division of Sindh, calling it an unconstitutional attack on the federation. While advocates from MQM-P blamed the former for creating an urban-rural divide in Sindh that requires creation of new administrative units.

Analysis:

The renewed debate highlights persistent centre-periphery tensions and the politicisation of administrative boundaries in Pakistan. The exchange reveals deep-seated mistrust between custodians of Sindh's unity, and representatives of urban interests. The absence of consensus-building dialogue and the use of charged language risk deepening ethnic and regional polarisation.

Way Forward:

- Establish a parliamentary committee or a multi-party forum to discuss administrative grievances and resource distribution to promote consensus-building.
- Prioritise improving municipal services, infrastructure, and local governance in Karachi to address urban frustrations
- All political actors must adhere to constitutional procedures for any boundary changes, ensuring any proposal is based on broad democratic consensus.

Balochistan to Launch modern Safe City Authority



The Balochistan government, led by Chief Minister Mir Sarfraz Bugti, has decided to establish a modern Safe City Authority. The initiative will install state-of-the-art surveillance cameras in major cities to improve security, traffic management, and emergency response.

Analysis:

This move represents a significant step in leveraging technology for public safety and urban management in a province grappling with security challenges. Following Punjab's lead indicates a standardized approach to Safe City projects which can facilitate inter-provincial coordination. However, the long-term success will depend on robust data protection frameworks, sustainable funding for maintenance, and integration with existing law enforcement infrastructure.

Way Forward:

- Develop and enforce clear legal protocols for data collection, storage, access, and privacy to prevent misuse and build public confidence in the surveillance system.
- Invest in training local personnel for system operation, maintenance, and data analysis to ensure sustainability.
- Use the technology as a tool to support, not to replace community-oriented policing strategies.

SOCIO ECONOMIC ISSUES

Grid bottlenecks drive up power tariffs: Nepra



The National Electric Power Regulatory Authority reported that transmission bottlenecks, overloaded grid stations, and delayed infrastructure projects are forcing Pakistan to use expensive power generation, increasing electricity tariffs. Weak transmission links prevent cheaper electricity from reaching demand centres, while incomplete interconnections between National Transmission and Despatch Company and K-Electric have further raised costs and reduced efficiency. These inefficiencies are directly burdening consumers with higher tariffs and unreliable supply.

Analysis

The report highlights serious structural weaknesses in Pakistan's transmission system, which undermine cost-efficient power distribution. Poor planning, delayed upgrades, and underutilised infrastructure increase reliance on expensive generation and capacity payments. This reflects governance and coordination failures in the power sector. Without timely transmission expansion and integration, electricity will remain costly and unreliable, negatively affecting economic growth and public welfare.

Way Forward

- Ensure timely completion of pending grid stations, substations, and transmission lines under the supervision of the National Transmission and Despatch Company to remove bottlenecks and enable efficient electricity flow.
- Introduce strict project timelines, performance audits, and penalties for delays in transmission projects to improve efficiency and governance.
- Regular monitoring and transparent reporting by NEPRA to ensure operational efficiency, cost control, and protection of consumer interests.

Rising mercury to heighten melting, GLOF risk up north



The Pakistan Meteorological Department warned that temperatures in Gilgit-Baltistan and Kashmir are rising above normal from February to April 2026, with some areas recording 3–5°C higher daytime temperatures. Reduced snowfall and warmer nights are accelerating glacier melt and increasing water levels in glacial lakes. This significantly raises the risk of glacial lake outburst floods (GLOFs) in vulnerable northern districts like Gilgit, Hunza, and Skardu.

Analysis:

This trend reflects worsening climate change impacts in northern Pakistan, where reduced snowfall and higher temperatures weaken glacier stability. Increased glacier melt raises the risk of floods, threatening local communities, infrastructure, and water security. Without early warning systems, climate adaptation policies, and environmental protection, northern regions may face more frequent and severe climate disasters in coming years.

Way Forward:

- Install advanced glacier monitoring and Glacial Lake Outburst Flood (GLOF) early warning systems in high-risk areas like Gilgit, Hunza, and Skardu to provide timely alerts and reduce loss of life and property.
- Enhance the capacity of the Pakistan Meteorological Department and environmental agencies to continuously monitor temperature trends, glacier melt, and snowfall patterns for accurate forecasting and preparedness.
- Educate local communities about GLOF risks, evacuation plans, and disaster preparedness to ensure quick and effective response during emergencies.

ECONOMIC ISSUES

CDA Chairman orders action against over-charging amid increasing complaints



CDA Chairman Muhammad Ali Randhawa has directed authorities to take strict action against over-charging and profiteering in Islamabad. He instructed the formation of special teams to conduct raids against elements creating an artificial price hike. The chairman also ordered market committees to ensure the availability of essential items at government-fixed rates, with any negligence resulting in action against concerned officials.

Analysis:

This directive reflects the civic agency's effort to address immediate public grievances related to inflation and market exploitation in the federal capital. The focus on enforcement through special teams and accountability for officials indicates a shift toward more proactive governance. However, without sustainable measures addressing supply chain inefficiencies such crackdowns often provide only temporary relief.

Way Forward:

- Create a permanent monitoring unit within CDA with a toll-free helpline and mobile app for citizens to report over-charging in real-time.
- Revitalize district price control committees with representation from traders, consumers, and civil administration to ensure transparent price setting.
- Coordinate with the agriculture department and wholesale markets to identify bottlenecks causing artificial price hikes.

Prolonged power outages disrupt life in Gilgit Baltistan



Residents in Gilgit-Baltistan staged protests against prolonged power outages lasting over 20 hours which have also caused severe water shortages. Protesters criticize the government's failure to provide basic utilities even during Ramazan. The outages have disrupted daily life, affected freelancers and remote workers, and impacted mobile networks as towers become non-operational.

Analysis:

The crisis highlights the structural vulnerability of GB's energy infrastructure, which relies almost entirely on hydropower and faces severe seasonal generation shortfalls in winter. The cascading impact on water supply, telecommunications, and livelihoods demonstrates how power insecurity undermines multiple dimensions of daily life and economic activity. The situation also raises questions about regional equity in resource allocation, given GB's constitutional status and limited fiscal autonomy.

Way Forward:

- Accelerate the development of alternative energy projects to reduce seasonal dependency on hydropower.
- Create a crisis management cell in the Power Department to coordinate rapid deployment of backup generators and provide transparent communication to citizens during outages.
- Conduct a comprehensive energy audit and feasibility study for sustainable power solutions with clear timelines and funding commitments from the federal government.

SECURITY AND LAW & ORDER

Sindh cabinet okays Rs33.7bn to upgrade firefighting, emergency response



The Sindh Cabinet, led by Syed Murad Ali Shah, approved a Rs33.7 billion plan to modernise firefighting and emergency response services, including new fire vehicles, drones, and an early warning system. The cabinet also introduced reforms to protect women agricultural workers, digitise business registration, compensate Gul Plaza fire victims, and strengthen regulatory institutions like the Sindh Electric Power Regulatory Authority.

Analysis:

This decision reflects Sindh's strategic shift toward modern disaster preparedness and digital governance, aiming to reduce emergency response time and improve public safety. Labour protections and business reforms indicate a balanced approach toward social welfare and economic efficiency. However, effective implementation, transparency, and institutional coordination will be critical to ensure long-term impact and public trust.

Way Forward

- Collaboration with the Chinese Consulate for specialised firefighting equipment highlights the importance of international partnerships. Such cooperation can help Sindh access advanced technology, technical expertise, and modern emergency management practices.
- Compensation for Gul Plaza fire victims reflects government responsibility and commitment to citizen welfare. Such measures help rebuild public trust and demonstrate the importance of accountability in governance.
- Digital factory registration, online licensing, and simplified regulatory procedures will reduce bureaucratic delays and improve transparency. These reforms will attract investment, promote industrial growth, and support economic development across Sindh.

Punjab becomes first province to establish PIFTAC



The Government of Punjab, led by Maryam Nawaz, established the Provincial Intelligence Fusion and Threat Assessment Centre (PIFTAC) to enhance intelligence coordination, counterterrorism, and cyber security, including plans for an anti-drone unit and AI hub. The government also implemented strict price control measures during Ramadan, resulting in significant reductions in essential commodity prices, subsidised food distribution, and enforcement actions against overpricing and food quality violations.

Analysis:

The creation of PIFTAC reflects a strategic shift toward proactive and technology-driven security management, strengthening Punjab's ability to prevent terrorism and emerging threats. Simultaneously, effective price control and subsidy initiatives demonstrate governance focused on economic relief and social welfare. These measures can improve public trust and stability, but sustained success will depend on transparency, institutional capacity, and consistent enforcement.

Way Forward

- Continuous combing operations, whistle-blower protection, and intelligence monitoring will help prevent threats before they occur, shifting from reactive to preventive law enforcement.
- Digital dashboards and coordinated intelligence systems introduced by the Government of Punjab will improve transparency, faster decision-making, and better coordination among districts and security agencies.
- Expand PIFTAC's capabilities to act as a centralised hub for all intelligence inputs from provincial and district-level agencies. Integrating AI and data analytics will allow predictive threat modelling and faster pre-emptive responses to security risks.

INTERNATIONAL AFFAIRS

Global security order shifting rapidly, UN chief warns



UN Secretary-General Antonio Guterres warned that the global security order is rapidly shifting, with human rights under “full-scale attack” and international law increasingly ignored. He highlighted the war in Ukraine and rights violations in the occupied Palestinian territory, emphasizing that the two-state solution is being undermined. UN rights chief Volker Turk also noted the resurgence of domination and supremacy, with force increasingly normalised in resolving disputes.

Analysis

The address signals growing global instability and the erosion of multilateral norms established over the past eight decades. Human rights abuses and aggressive power competition threaten international security and the rule of law. Without coordinated global action, autocratic trends and unilateral use of force could further destabilise conflict zones and weaken the UN’s role as a guardian of human rights.

Way Forward

- Pakistan should actively engage in UN forums and regional platforms to advocate for adherence to international law, protection of human rights, and resolution of conflicts through dialogue rather than force.
- Maintain Pakistan’s consistent diplomatic stance on the occupied Palestinian territory, pushing for a viable two-state solution and highlighting human rights violations at international forums.
- Advocate for a stronger, more effective UN system where member states are held accountable, aligning with Pakistan’s interest in promoting equitable international governance.

Tump warns countries against ‘playing games’ with tariffs



US President Donald Trump threatened countries with higher tariffs if they “played games” following the Supreme Court’s ruling on previous import duties. China urged the US to cancel unilateral tariff measures, warning that trade wars have no winners, while the European Union announced it would freeze a key trade deal with the US in response to the ruling. The dispute highlights rising global trade tensions.

Analysis

The development underscores escalating protectionism and its potential to disrupt international trade relations. Trump’s tariff threats risk straining US relations with major economic partners, while China and the EU signal resistance to unilateral measures. Prolonged trade uncertainty could impact global markets, supply chains, and economic growth, highlighting the need for coordinated multilateral trade dialogue.

Way Forward

- Pakistan should avoid taking sides in the US-China-EU trade tensions while safeguarding its own export and import interests.
- Use platforms like the World Trade Organization (WTO) to advocate for fair trade practices and to raise concerns over unilateral tariffs affecting developing countries.
- Closely track changes in US and EU tariff policies, assessing their potential effect on Pakistan’s exports, especially textiles, agricultural products, and industrial goods.

INTERNATIONAL AFFAIRS

Middle East build-up points to 'limited action, not war'



The US has deployed its largest naval presence in the Middle East since 2003, including the USS Gerald R. Ford, but experts say the build-up is structured for limited action rather than a full-scale war with Iran. President Donald Trump emphasises diplomacy first, while signalling readiness for targeted strikes if necessary, as upcoming US-Iran nuclear talks in Geneva approach. Analysts caution that military pressure may push Tehran toward confrontation, but current US forces lack the capacity for regime change or prolonged operations.

Analysis:

The deployment reflects a strategy of coercive diplomacy using military presence as leverage rather than preparing for full-scale conflict. While sufficient for targeted strikes and deterrence, the limited logistical and ground capabilities make a sustained campaign unrealistic. The situation underscores the delicate balance between signalling strength and avoiding escalation, highlighting the risks of miscalculation in a tense regional environment.

Way Forward:

- Pakistan should continue its traditional stance of neutrality in US-Iran tensions, avoiding alignment that could entangle the country in regional conflict while ensuring its national security interests are preserved.
- Rising oil prices due to Middle East tensions directly affect Pakistan's economy. Authorities should monitor global crude prices, prepare contingency plans for energy imports, and mitigate inflationary pressures on essential commodities.
- Engage Organisation of Islamic Cooperation and United Nations to defuse tensions and prevent escalation in South Asia.

Iran, Pakistan share positions on regional, world issues: envoy



Iran's Ambassador to Pakistan, Reza Amiri-Moghaddam, highlighted that Pakistan and Iran maintain close and constructive ties, sharing positions on regional and global issues, including Palestine. Bilateral relations are strengthened through high-level delegations, 25 agreements, and cooperation via multilateral platforms like SCO, OIC, ECO, and D-8, despite challenges such as terrorism and sectarianism.

Analysis:

The relationship reflects strategic alignment grounded in shared history, geographic proximity, and complementary economic and security interests. Sustained diplomatic engagement and multilateral collaboration enhance mutual trust and regional stability, providing Pakistan and Iran a platform to jointly address security, economic, and geopolitical challenges while advancing people-to-people and cross-border cooperation.

Way Forward:

- Leverage shared membership in organisations such as the Shanghai Cooperation Organisation (SCO), Organisation of Islamic Cooperation (OIC), Economic Cooperation Organisation (ECO), and D-8 to coordinate on regional security, trade, and development initiatives.
- Coordinate positions on key regional matters, such as Palestine, Afghanistan, and Middle East stability, to amplify influence and ensure aligned diplomatic stances in international forums.
- Develop a roadmap for sustainable bilateral cooperation encompassing security, economy, culture, and diplomacy, positioning Pakistan-Iran relations as a pillar of regional stability and strategic partnership.

INTERNATIONAL AFFAIRS

Pakistan delivers 'fulsome, effective' response to unprovoked Afghan attack



Pakistan conducted intelligence-based operations against terrorist hideouts in Afghanistan's Khost and Paktia provinces in response to an unprovoked Afghan attack that resulted in civilian casualties on Pakistani soil. The Foreign Office described the response as "fulsome and effective," targeting terrorists responsible for violence in Pakistan and facilities used by terrorist groups.

Analysis:

This military response marks a significant escalation in Pakistan-Afghanistan tensions, with cross-border strikes signaling a shift from diplomatic protests to kinetic action against terrorist sanctuaries. The operation underscores Pakistan's growing impatience with terrorist groups operating from Afghan soil, despite previous diplomatic engagements. This development risks further bilateral tensions but demonstrates Pakistan's commitment to counterterrorism red lines.

Way Forward:

- Engage with the Afghan interim government through diplomatic and military channels to de-escalate tensions while clearly communicating Pakistan's right to self-defence against cross-border terrorism.
- Strengthen border management mechanisms, including biometric systems and joint border coordination mechanisms, to prevent terrorist infiltration.
- Hold the US responsible for irresponsibly leaving modern military technology in Afghanistan that is now being used by terrorist groups in the region.

India, Israel to boost defence cooperation, says Modi



Indian Prime Minister Narendra Modi announced that India and Israel will finalize a free trade agreement and enhance defence cooperation through joint development, production, and technology transfer. Speaking at the end of his two-day visit to Israel, Modi stated both countries agree there is "no place for terrorism in the world" and will oppose it "shoulder to shoulder." The visit included addresses to the Israeli parliament and meetings with top leadership.

Analysis:

This deepening India-Israel partnership represents a significant strategic realignment with direct implications for regional geopolitics. The defence cooperation framework extends beyond procurement to co-development and technology transfer, indicating long-term strategic convergence. Modi's explicit solidarity with Israel, including his address to the Knesset, signals India's growing willingness to position itself visibly in Middle Eastern politics.

Way Forward:

- Pakistan should closely monitor the evolving India-Israel strategic partnership and its implications for conventional and unconventional military balances in South Asia.
- Engage proactively with key Muslim and non-aligned countries to articulate concerns about emerging alliances that could exacerbate regional tensions.
- Strengthen diplomatic outreach to explain Pakistan's perspective on Kashmir and regional security, countering narratives that conflate terrorism with legitimate freedom struggles.

POLICY NUGGETS

1 Tax on Health Services May Accelerate Medical Brain Drain

Impact

Additional taxation on health services could intensify the outflow of medical professionals and strain an already fragile healthcare system.

Recommendation

Reconsider fiscal measures on essential health services while introducing targeted incentives to retain medical talent.

“The health of the people is really the foundation upon which all their happiness and all their powers as a state depend.” – Benjamin Disraeli

2 Iran Warns of ‘Feroocious’ Response to Potential US Strikes

Impact

Escalatory rhetoric raises the risk of regional conflict and potential disruption to global energy markets.

Recommendation

Prioritize diplomatic engagement and reinforce multilateral nuclear oversight to prevent miscalculation. *“Peace cannot be kept by force; it can only be achieved by understanding.” – Albert Einstein`*

3 Pakistan & Saudi Arabia Advance Toward Strategic Economic Treaty

Impact

A strategic economic treaty could strengthen bilateral trade, investment, and long-term economic stability.

Recommendation

Embed clear implementation and monitoring mechanisms to ensure tangible economic outcomes. *“Economic growth without social progress lets the great majority of people remain in poverty.” – John F. Kennedy*

4 High out-of-school numbers signal structural gaps in education system

Impact

Risk undermining human capital formation, widening inequality, and weakening long-term productivity.

Recommendation

Linking enrolment targets to provincial fiscal incentives could accelerate inclusion and reduce long-term productivity losses.

“Education is the most powerful weapon which you can use to change the world.” – Nelson Mandela

5 Pakistan–Europe migration pact signals shift toward regulated mobility

Impact

Strengthens Pakistan’s credibility in migration governance, improves labour access to European markets while reducing smuggling networks.

Recommendation

Operationalise legal migration quotas, skills certification, and data-sharing mechanisms. *“Migration should be a choice, not a necessity.” – Ban Ki-moon*

6 NFC reform debate exposes fiscal imbalance

Impact

Highlights deep structural fiscal imbalance, constraining federal policy capacity and long-term economic stability.

Recommendation

Reform the NFC formula to reward fiscal effort, poverty reduction, and revenue generation. *“Stability and growth require sound fiscal systems that balance responsibility with fairness.” – Joseph Stiglitz*

7 Punjab launches subsidised e-taxi scheme

Impact

Shift toward green transport while expanding women’s economic participation.

Recommendation

Ensure charging infrastructure, financing access, and transparent selection to sustain adoption.

“The best way to predict the future is to create it.” – Peter Drucker

8 Higher education is not translating into employment for women in Pakistan.

Impact

Weakens economic productivity, erodes returns on educational investment and constrains inclusive growth.

Recommendation

Prioritise high-skill job creation, industry-academia alignment, and safe, flexible workplaces.

“When women are empowered, all of society benefits.” – Kofi Annan

9 The government reinforces its resolve against terrorism and digital relief roll out.

Impact

Signals continued prioritisation of counterterrorism and welfare delivery and reinforcing state legitimacy.

Recommendation

Pair security operations with long-term de-radicalisation and institutionalised digital welfare systems.

“There is no development without security, and no security without development.” – Kofi Annan



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