



RESEARCH BRIEF ▶

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China Pakistan Economic Corridor and the Geography of Poverty: Brief Analysis

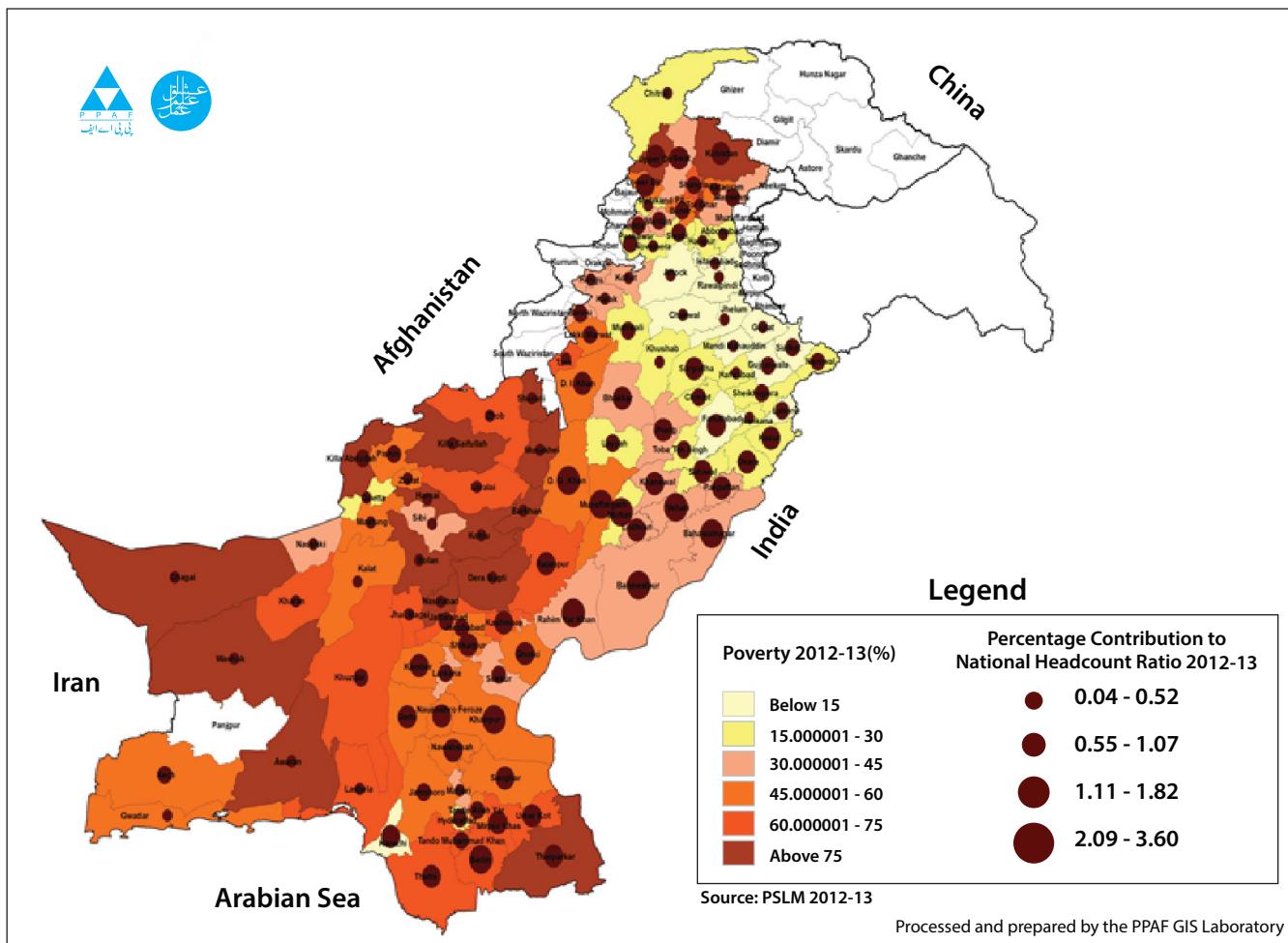
There is an extensive public debate in the country about the potential impact of the China Pakistan Economic Corridor (CPEC)ⁱ projects on the somewhat troubled economic relations between and within the federating units of Pakistan. This debate is further intensified by the continued representation of the CPEC by country's political leadership as an overarching programme of economic cooperation, not just a 'game-changer' but a 'fate-changer', with the potential to address virtually all key longstanding developmental challenges of Pakistan including, economic growth, energy challenges, infrastructure development, poverty reduction and social development.ⁱⁱ This brief attempts to situate the CPEC proposed economic activity within the highly uneven landscape of social and economic development of Pakistan and assess its distributive potentials. Admittedly, it is too early to predict the long term outcomes of these initiatives (about which the information remains scarce) as they are contingent on a host of factors including the political stability in the region, conducive bilateral relationships with various countries, and global, regional and national economic conditions, to say the least.

Arguably CPEC has constructed a new framework of collaboration, economic interaction and integration, and cooperation between the two countries, which is said to have far-reaching geo-economic and political implications, perhaps, for the entire region. Both China and Pakistan are expected to obtain enormous social and economic gains from trade and commerce, and connectivity through roads, railways and sea-lanes with the neighbouring regions including the Middle East and Europe.ⁱⁱⁱ Based on the publicly available information, CPEC projects can broadly be classified into three categories: building and improving transport infrastructure including road and rail networks; developing energy infrastructure, and; the creation of special economic zones. Looking at these projects through a geographic lens can help us explore the distributive potential of CPEC, the extent to which it can uplift the socio-economically least developed regions of the country, and the areas where the largest populations of the poor live. In this brief we argue that unless the economically underdeveloped regions are mainstreamed into the emerging economic integration, it is less likely to benefit the poor in the near future.

Given the concentration of the poor and poverty in certain regions within each province, the regional (provincial and sub-provincial) analysis is central to the inferences we want to make and the arguments we would like to put forward. Before doing so, it is important to take a broader picture of the landscape of the social and economic development of Pakistan. A recent district level analysis provides a detailed overview of the landscape of poverty in Pakistan with insights into the temporal changes on multidimensional poverty by using information on education, health, asset ownership and living conditions.^{iv} It shows that one-third of Pakistan was multidimensional poor in 2012-13, and importantly, poverty was unequally distributed across the country, between rural and urban populations, and between and within provinces.

Map 1 summarizes the complex distribution of poverty based on the district level estimates of multidimensional poverty headcount ratio (as the background color). The darker the shade of the map, the higher the percentage of its population living below the poverty line; the bigger the size of the circle, the higher the number of poor people living in the district. Clearly, most districts in Balochistan had the highest incidence of poverty to the extent that 9 districts had more than 85% of their population living below poverty line. Out of 56 districts in the poorest two quintiles, 23 were from Balochistan, 11 from Sindh and 8 from KP and two from Punjab. The quintile of districts with the highest size of poor population is home to nearly one-third of the poor population of the country. Out of these 23 districts, 11 are from South Punjab, 9 from Sindh and three from KP.^v In sharp contrast to these poverty-stricken districts, districts in the north of Punjab, KP's Hazara Division, and provincial headquarters are characterized with very low incidence of poverty. In the 23 districts in the least poor quintiles of districts, headcount ratio varied from 3.7% to 20%, and 14 of such districts were from North Punjab, four other provincial and federal capitals, three from KP and one from Sindh. Despite housing more than 40 percent of country's population, districts in the least poor quintile have housed only 13.5% of country's poor.

Map 1: District level landscape of multidimensional poverty in Pakistan 2012-13



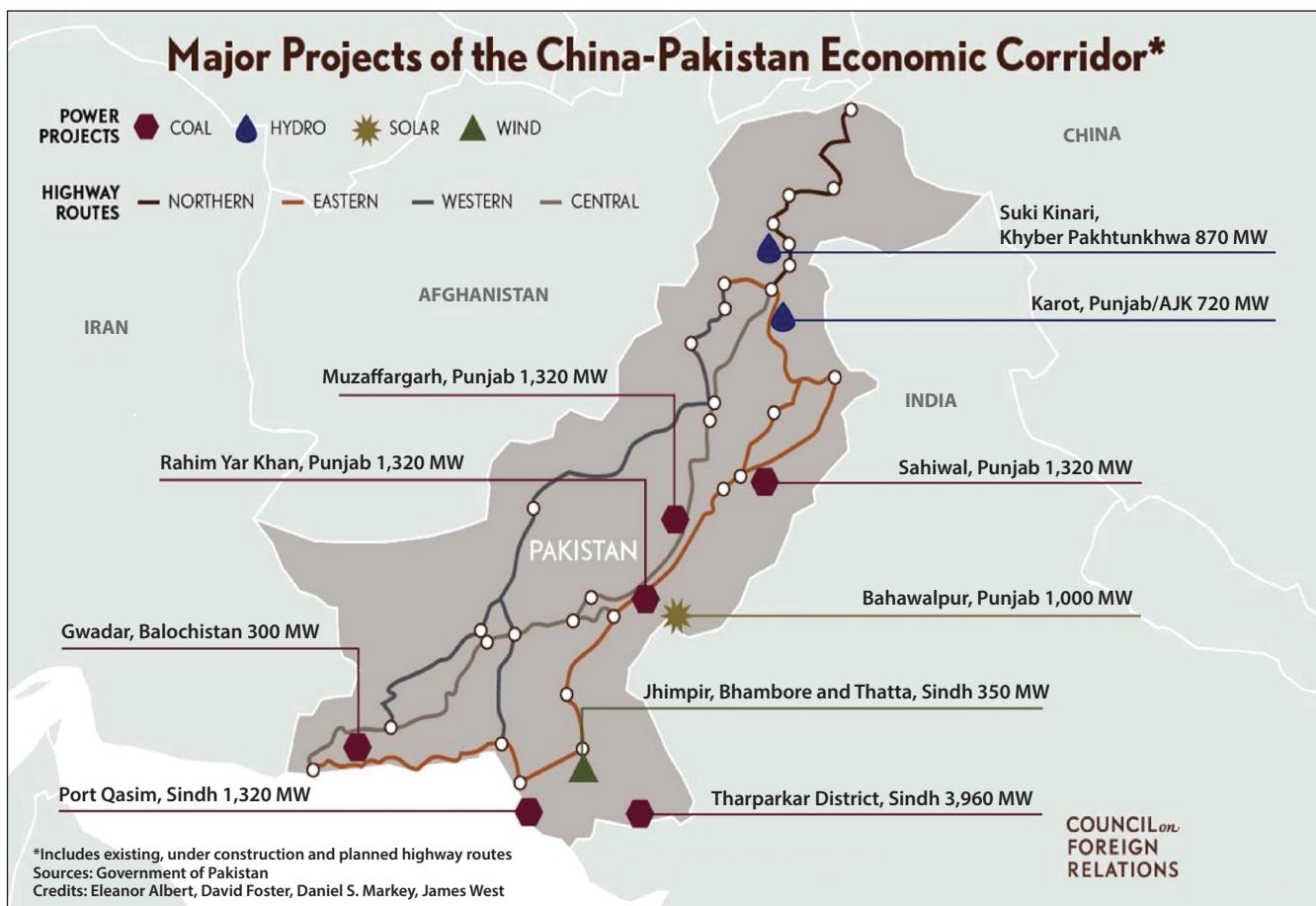
Source: Naveed, Wood and Ghaus (2016)

Map 1 allows us to explore the egalitarian and distributional potential of various development interventions, with CPEC being a major one. Economic opportunities in the poorest regions and districts, containing a high proportion of poor population are likely to increase economic participation, eradicate poverty and reduce regional imbalances. In contrast, the concentration of economic and development opportunities in the least poor region, as has always been the case, is less likely to reduce poverty and more likely to increase regional inequalities. This is not to deny the possibilities of a trickle-down effect where the concentration of wealth in certain parts of the country can also improve livelihoods in other parts of the country; yet, the potential of such effects can be contested on many grounds.

CPEC Geography

We now turn to the geographic breakdown of the CPEC projects related to infrastructure, energy and special economic zones, which are the major sectors. Such breakdown will help us identify the territories that seem to gain the most from these interventions, and those that will be left out potentially increasing regional inequality. Map 2 presents the geographic breakdown of the infrastructural and energy related projects providing us the grounds for assessing the distributive potential of these interventions.

Map 2: Infrastructure and energy projects under CPEC



Source: Daniel S. Markey, "Behind China's Gambit in Pakistan," Expert Brief, Council on Foreign Relations, 2016.

Energy infrastructure

Pakistan economy has greatly suffered over the last many years due to acute energy shortage. Estimates suggest that the country lost 2.0-2.5% of its GDP growth due to energy shortage alone.^{vi} CPEC has, for the right reasons, greatly focused on developing energy infrastructure and approximately 72% of the total \$62 billion investment relates to energy-resource development that includes electricity generations through gas, furnace oil, solar and coal.^{vii} Increased production of energy can affect living conditions in many ways: through increased access of households to various amenities; employment generation through efficient working of business, production units and commercial sector; and, direct and indirect employment generated in the process of energy production. The consumption of electricity does not depend upon the site of its production, and it can be supplied to distant places through distributary networks. However, employment generation as well as environmental damage in the process of energy production can have implications for poverty reduction in certain regions. Coal based energy production in densely populated areas can have serious environment and health consequences thus exacerbating poverty. It is therefore important to explore the sites and types of energy production units. Table 1 presents the details of various energy production units including the type of energy, production capacity and the estimated costs.



Table 1: Breakdown of CPEC energy projects

S.NO.	Project Name	Energy Source	MW	Estimated Cost (US\$M)	Location
1	2x660MW Coal-fired Power Plants at Port Qasim	Coal	1,320	1,980	Karachi, Sindh
2	Suki Kinari Hydropower Station	Hydel	870	1,802	Naran, Khyber Pakhtunkhwa
3	Sahiwal 2x660MW Coal-fired Power Plant	Coal	1,320	1,600	Sahiwal, Punjab
4	Engro Thar Block II 2x330MW Coal fired Power Plant TEL 1x330MW Mine Mouth Lignite Fired Power Project at Thar Block-II Thalnova 1x330MW Mine Mouth Lignite Fired Power Project at Thar Block-II Surface mine in block II of Thar Coal field, 6.5 million tons/year	Coal Coal Coal Coal	660 330 330 1,470	2,000	Tharparkar, Sindh Tharparkar, Sindh Tharparkar, Sindh Tharparkar, Sindh
5	Hydro China Dawood 50MW Wind Farm (Gharo)	Wind	50	125	Thatta, Sindh
6	300MW Imported Coal Based Power Project at Gwadar	Coal	300	600	Gwadar, Balochistan
7	Quaid-e-Azam 1000MW Solar Park	Solar	300 600 100	1,215	Bahawalpur, Punjab
8	UEP 100MW Wind Farm (Jhimpir)	Wind	100	250	Thatta, Sindh
9	Sachal 50MW Wind Farm (Jhimpir)	Wind	50	134	Thatta, Sindh
10	SSRL Thar Coal Block-I 7.8mtpa &SEC Mine Mouth Power Plant (2x660MW)	Coal	1320	2,000	Tharparkar, Sindh
11	Karot Hydropower Station	Hydel	720	1,420	Rawalpindi in Punjab, Hollar in Azad Jammu and Kashmir
12	Three Gorges Second Wind Power Project (Jhimpir) Three Gorges Third Wind Power Project (Jhimpir)	Wind Wind	50 50	150	Thatta, Sindh Thatta, Sindh
13	CPHGC 1,320MW Coal-fired Power Plant, Hub	Coal	1,320	1,940	Lasbela, Balochistan
14	Thar Mine Mouth Oracle Power Plant (1320MW) & surface mine	Coal	1320	1,300	Tharparkar, Sindh
15	Kohala Hydel Project	Hydel	1,100	2,397	Azad Jammu and Kashmir
16	Rahimyar Khan imported fuel Power Plant 1320 MW	Furnace Oil	1,320	1,600	Rahimyar Khan, Sindh

Source: CPEC website (last assessed January 2018)

Table 1 demonstrates the regional concentration of the overall energy infrastructure projects. Virtually all non-coal energy related projects are located in Punjab. The potential consequences of such concentration particularly through the income and employment generation resulting directly from the energy generating processes can worsen regional inequality instead of mitigating it. The dominant energy source is coal; of the total 16 energy projects, 10 projects are coal based, and almost all of them located in Southern Punjab, Sindh's hinterland and Southern Balochistan. The concentration of coal based power production in these regions with the largest populations of poor, and in Balochistan with the highest poverty rates can rather perpetuate deprivations through health and environmental consequences.

While the planned energy projects in some of the poorest rural areas can benefit the national economy, yet for the local people who face the potential fallouts the net gain from such projects is less assured. The community may hardly receive any promised benefits, such as employments and electricity. History tells us that jobs in mega-projects are rarely offered to local people, as the local workers are generally under/un-skilled, hence unemployable. Instead, skilled and semi-skilled workers are brought in from all over the country to fill them. The Hub Power Company Limited (HUBCO) at Hub, District Lasbela in Balochistan is an example in this regard. HUBCO supplies net 1200MW directly to National Grid, with no supplies to the population in District Lasbela. The employees are brought mainly from Karachi and other parts of Pakistan, with negligible or no employees from District Lasbela. Instead, the project has created massive industrial waste endangering the marine life, which jeopardized fisheries, the main source of livelihood of local people.^{viii}



Special Economic Zone

Special Economic Zones (SEZs) are the areas where the business or trade laws are different from the rest of the country.^{ix} The most vital part of CPEC is the establishment of SEZs aiming to boost industrial growth and spur trade in the country. The Government of Pakistan has planned to create nearly 29 Industrial Parks and 21 Mineral Processing Zones in all four provinces under the CPEC umbrella, out of them 27 are granted the status of Special Economic Zones and Mineral Processing Zones around the country.^x The rationale behind these Industrial Parks and SEZs is to promote a robust process of industrialization, which can be further supported through CPEC related infrastructure and roads network.

Table 2: CPEC Special Economic Zones

Khyber Pakhtunkhwa Province	
Name of SEZs	Types of Industry/Details
1. Hattar Industrial Estate	Feasibility study yet to be carried out
1. Mansehra Marble and Granite Industrial Estate	Marble and Granite
3. Nowshera Industrial Estate	Fruit; Food; Packaging; Textile Stitching/Knitting
3. Chitral Industrial Estate	Food Possessing
4. Ghazi Industrial Estate	Manufacturing
5. D. I. Khan Industrial Estate	Manufacturing
6. Bannu Industrial Estate	Food processing/Manufacturing
7. Karak Oil Refinery	Oil Refinery
Punjab Province	
1. Pind Daden Khan Industrial City	Manufacturing
2. Multan Industrial Estate-II	Feasibility study yet to be carried out
3. Rahim Yar Khan Industrial Estate	Feasibility study yet to be carried out
4. Bahawalpur Industrial Estate	Feasibility study yet to be carried out
5. DG Khan Industrial Estate	Feasibility study yet to be carried out
6. Mianwali Industrial Estate	Feasibility study yet to be carried out
7. Rawalpindi Industrial Estate	Feasibility study yet to be carried out
8. China Economic Zone, M-2 District Sheikhupura	Feasibility study yet to be carried out
Balochistan Province	
1. Gwadar Industrial Estate	Mixed
2. Lasbela Industrial Estate	Manufacturing
3. Turbat Industrial Estate	Oil Refinery
4. Dera Murad Jamali Industrial Estate	Feasibility study yet to be carried out
5. Winder Industrial and Trading Estate	Manufacturing
6. Mini Industrial Estate Khuzdar	Feasibility study yet to be carried out
7. Bostan Industrial Estate	Fruit Processing, Agriculture machinery, Pharmaceutical, Motor Bikes Assembly, Chromites, Cooking Oil, Ceramic industries, Ice and Cold storage, Electric Appliance Halal Food Industry
8. Industrial Zone Killa Saifullah, Zhob and Lorali	Feasibility study yet to be carried out
Sindh Province	
1. Chinese Industrial Zone near Karachi	Feasibility study yet to be carried out
2. Textile City near Port Qasim	Textile
3. Marble City Karachi	Marble and Minerals
4. China Special Economic Zone Dhabeji	To be determined during feasibility stage
Gilgit-Baltistan	
1. Moqpondass Industrial Estate	Marble/Granite; Iron Ore Processing; Fruit Processing; Steel Industry; Mineral Processing Unit; Leather Industry



The details mentioned in table 2 show the geographical locations of the SEZs, which are distributed across provinces. Much of the details of the proposed zones are yet to be made public, which makes it premature to assess their employment and development potentials, yet presuming that the SEZs are established as they are planned, we can make some assessment of their impact on poverty reduction and human development. The SEZs can potentially affect human capabilities through three broad channels: human capital formation effects, technological upgrading effects and employment effects. These factors can individually and collectively translate into poverty reduction and have the potential to improve living conditions of the participating labour force in their respective regions.

Importantly, some of the proposed SEZs in various regions are dominated by labour intensive industries like food processing, electronic component assembly and other intermediate level manufacturing. The SEZs that are dominated by industries that can trigger a wider value chain are more effective in employment generation and poverty reduction than the ones that are more extractive. The zones with mining and mineral related industries are largely extractive and often capital intensive with very little employment generation for local residents. These industries also have an adverse impact on the environment. For instance, Khuzdar, Lasbela, Kohlu, Killa Saifullah, Chagi and Nushki in Balochistan are Districts from where the bulk of minerals are extracted. The same districts are among the poorest ones in Balochistan. The direct incomes generated from mining activities do not incur to local people. The districts in Balochistan, and elsewhere in Pakistan where mines are extracted, have historically remained poor, the development of mines however further impeded the slow and existing negligible process of development. Mineral resources are non-renewable, and surplus generated by national or international mining firms could partially be reinvested in developing other forms of capital in these regions, such as human capital, and in overall social and economic development which can partially offset the damaging effects of resource exploitation. Moreover, the provincial government(s) can enforce and make it mandatory for the local and international firms engaged in mining activities to invest rural infrastructure development, human resource development and provision of livelihood incentives. Additionally, these SEZs can potentially open up employment opportunities for women at the regional level as their participation in total labour force is normally higher in SEZs even in countries and regions with relatively lower level of female labour participation.

Whilst these SEZs are yet to be established, one needs to assess the feasibility of these zones within their given regional conditions. In order to boost industrialisation in specific areas the government of Pakistan previously established numerous SEZs in various parts of the country during 1990s in all provinces. A majority of these SEZs failed to yield any tangible results. The major reasons of their failure were many, including the dearth of sustained government interests, unavailability of the appropriately skilled human resource, and above all the lack of the economies of scale. Initially the leading industrialists chose to establish their industrial units in these SEZs given incentives, later on, turning into tax havens as the actual firms remained less profitable given the higher cost of productions compared to similar industries located in urban centres. There are concerns about the relevance of the CPEC related SEZs to the country's key markets. Importantly, many of the locations, which are identified for SEZs, are the least populated areas of the country that subsequently can make it difficult for these SEZs to get skilled or semi-skilled workforce. Such a situation would make SEZs unsustainable in the long run. Zones with proximate access to large consumer markets, suppliers, and skilled and semi-skilled labour tend to be more successful. Many studies^{xi} show that Economic Zones located comparatively far from inputs, consumers and trade markets are less likely to sustain in the long run. On the other hand however the regional equality requires equitable economic opportunities in all regions, the logic of economic agglomeration favours concentration in certain regions strengthening the existing patterns of geography of poverty. There are thus many concerns about the feasibility of these SEZs, their sustainability in proposed regions and their potential socioeconomic outcomes for poverty reduction.

Transportation Network Including Roads and Railways

The second largest component of CPEC investment with total worth of \$11 billion entails to upgrade and extend transportation network, including highways and railways, of Pakistan.^{xii} The transportation networks, on one hand act as a channel to connect Chinese products to the Gwadar seaport, on the other hand, they connect various parts of Pakistan through efficient means. Table 3 provides an overview of both road and rail networks which are part of the CPEC investments. As shown in Map 2, the first link is the Eastern Corridor that essentially is built on the existing National Highway connecting Karachi with up country. The Western Corridor passes through a relatively least developed part of the country. In the final phase, the Central Corridor will be constructed. It will pass mostly through Punjab and link up



with Balochistan.^{xiii} It will essentially by pass Northern Sindh. It is important to note that currently only the Eastern Corridor is constructed, which passes through relatively developed regions of the country, with very little impact on the poor regions. Given the vitality of Karachi seaports and its allied facilities, it is very likely that the Eastern Corridor remains the key artery of the Chinese trade through Pakistan.

Table 3: CPEC Infrastructure projects

Road Projects		
Project Name	Lenght (KM)	Estimated Cost (US\$M)
KKH Phase II (Thakot- Havelian Section)	118	1,305
Peshawar - Kharachi Motorway (Multan - Sukkur Section)	392	2,846
Khuzdar - Basima Road N-30 (110 km)	110	80
Upgradation of D.I.Khan - Zhob, N-50 Phase-I (210 km)	210	195
KKH Thakot - Raikot N-35 remaining portion (136 km)	136	719.8
Rail Sector Projects		
Expansion and reconstruction of existing Line ML-1	1,872	8,173
Havelian Dry port (450 M. Twenty-Foot Equivalent Units)		65
Capacity Development of Pakistan Railways		40

Sources: Ministry of Planning, Development and Reforms, Government of Pakistan (2017); CPEC website

Perhaps for the right reasons, the rail-based mass transit projects are planned for the provincial capitals: Karachi circular railway; Greater Peshawar Region Mass Transit; Quetta Mass Transit; Orange Line Lahore. So far it is Lahore Orange line that has become functional. The major urban centers in the country have historically lacked decent mass transit arrangements. These arrangements can surely improve economic activity in these places. However, when seen from the point of regional distribution of poverty, there is little that the largest populations of poor will benefit from these projects. Urban transport in the poorest regions and the much-needed rural transportation across country will remain unaffected by CPEC. Nonetheless, if the Western corridor, which passes through the poorest districts of Pakistan (see maps 1 and 2), is built on priority and made functional, and connected with the networks of farm roads, it can have a significant impact on poverty. The infrastructure development in these regions can encourage local enterprises, provide markets and ports access to agricultural produces and boost trade and commerce activities in the long run.

Conclusion

In this brief we argue that instead of introducing a paradigm shift towards an equitable distribution of opportunities, the CPEC seems to operate within the incumbent macroeconomic framework that inherently supports regional inequality. Unlike official claims, this brief suggests that it is unclear that the portfolio of CPEC projects address the chronic problem of poverty, underdevelopment and regional inequality in Pakistan. We have also highlighted that some of the interventions like coal-based power plants will have serious environmental consequences particularly for the poor and there seems no indication of mitigation mechanisms to address such hazards. Reducing poverty also requires building small-scale infrastructure, encouraging local level enterprises and enhancing the capacity of local communities through trainings and awareness programmes.

The majority of SEZs are still proposed plans, and their feasibilities are yet to be assessed. The potential impacts of proposed SEZs on employment generation and poverty reduction is questionable. Previous models of establishing Economic Zones in 1990s and large-scale industrialisation in 1970s are suggestive of the fact that both Economic Zones major industries miserably failed to sustain in less populated and underdeveloped regions, mainly because of the reasons discussed earlier in this brief. We doubt that many ambitious SEZs, particularly the ones planned for low population density and far flung regions could face a similar destiny. Undoubtedly the country needs to promote industrialisation in less developed regions to cope with socioeconomic challenges, like poverty, unemployment, income inequality and regional differences, and these SEZs could be a concrete initiative towards that end. Yet, the evidence so far suggests that previous governments have failed to have a well-designed and well-structured policy to establish the proposed SEZs on sustainable basis. Merely delimiting a piece of land declaring it a SEZ hardly suffices any need. SEZs in Gwadar, Bostan and Moqpondass Industrial Estate, for example, are just desolate pieces of lands with no



infrastructure and basic amenities. A serious thought of proposed SEZs could craft a plan for the provision of power and connectivity through road, rail and seaports and airports, and integrating them into national and international supply chain.

The highways and railways proposed under CPEC enable a link for China to the Arabian Sea passing through the length of Pakistan. Against the Western and Central Corridors, the Eastern Corridor has been prioritized so far, which is essentially built on the key artery that the seaports of Karachi to other regions of Sindh, the Punjab and KP, through already constructed highways and motorways. The majority of the districts with high incidence of poverty are situated on the routes of Western and Central Corridors, and bulk of the CPEC trade and commerce takes place through Eastern Corridor. The prioritized projects are likely to concentrate the opportunities within the already privileged regions while marginalizing the peripheral communities. As a major infrastructural development intervention, CPEC risks failing to command any redistributive potentials; instead it aggravates the already uneven socioeconomic and political landscape of the country.

ⁱThe governments of Pakistan and China developed a proposal in the mid-2000s to create an economic corridor from Kashgar in Western Chinese province of Xinjiang to the deep seaport in Gwadar in Balochistan, Pakistan to promote bilateral, national and international economic integration. Essentially driven to improve regional and global trade networks, the resulting China-Pakistan Economic Corridor (CPEC) was formally launched in 2013 with the initial planned portfolio of infrastructural, energy and economic projects worth around \$46 billion.

ⁱⁱA quick look at the messages by the Prime Minister and the Minister of Planning, Development and Reforms illustrates the level of expectations from the project. It is envisaged not just to be the 'game-changer' but a 'fate-changer', to boost economic growth, trade and investment opportunities, create jobs; free capital movement; advances in communication and transport infrastructure; national confidence and pride; transition from lower to middle income country; poverty reduction; industrial growth; connectivity; energy; industrial parks; agricultural development; tourism; financial cooperation; agricultural development; livelihood improvement; municipal infrastructure improvement including education and public health; connecting federating units of Pakistan; development of Balochistan in particular and Pakistan in general.

<http://cpec.gov.pk/messages/4>

<http://cpec.gov.pk/messages/1>

ⁱⁱⁱ Khan, Shabir Ahmed, "Geo-Economic Imperatives of Gwadar Sea Port and Kashgar Economic Zone for Pakistan and China" IPRI Journal, 13 (2013): pp. 87-100.

^{iv}Naveed Arif, Wood Geof and Ghaus Usman Muhammad, "Geography of Poverty in Pakistan – 2008-09 to 2012-13: Distribution, Trends and Explanations" Pakistan Poverty Alleviation Fund and Sustainable Development Policy Institute, Islamabad, Pakistan. (2016). http://www.ppaaf.org.pk/doc/PPAF_SDPI_Report_%20Geography_of_Poverty_in_Pakistan.pdf

^vAs many as one-quarter of Pakistan's poor lived in three Divisions of South Punjab including Multan, DG Khan and Bahawalpur.

^{vi} Declan Walsh. After Decades of Neglect, Pakistan Rusts in Its Tracks. The New York Times, My, 18, http://www.nytimes.com/2013/05/19/world/asia/pakistan-railroads-sum-up-nations-woes.html?_r=0.

^{vii} Ahmad Rashid Malik, "A Miracle on the Indus River?" The Diplomat, December 7, 2015, <http://thediplomat.com/2015/12/a-miracle-on-the-indus-river/>.

^{viii} Climate Change and Coastal Districts of Balochistan. Situational Analysis, Implications, and Recommendations. IUCN Pakistan 2012.

^{ix} For details on the status of SEZ please look at the Government of Pakistan's Special Economic Zones Act 2012: <http://boi.gov.pk/UploadedDocs/Downloads/Modified%20SEZ%20Act%202012.pdf>

^x<https://www.thenews.com.pk/print/13780-govt-proposes-29-industrial-parks-21-mineral-zones-under-cpec>

^{x1} See Thomas Farole. Special Economic Zones Performance, policy and practice- with a focus on Sub-Saharan Africa by International Trade Department, World Bank, 2010.

http://siteresources.worldbank.org/INTRANETTRADE/Resources/Pubs/SpecialEconomicZones_Sep2010.pdf

^{xii} Claude Rakits. A Path to the Sea: China's Pakistan Plan. World Affairs 178, no. 3 (Fall 2015): 67-74.

^{xiii} Pasha, A. Hafiz. Growth and Inequality in Pakistan (volume – 1): Friedrich Ebert Stiftung, Islamabad (2018).

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