



NATIONAL TRANSPORT POLICY OF PAKISTAN 2018

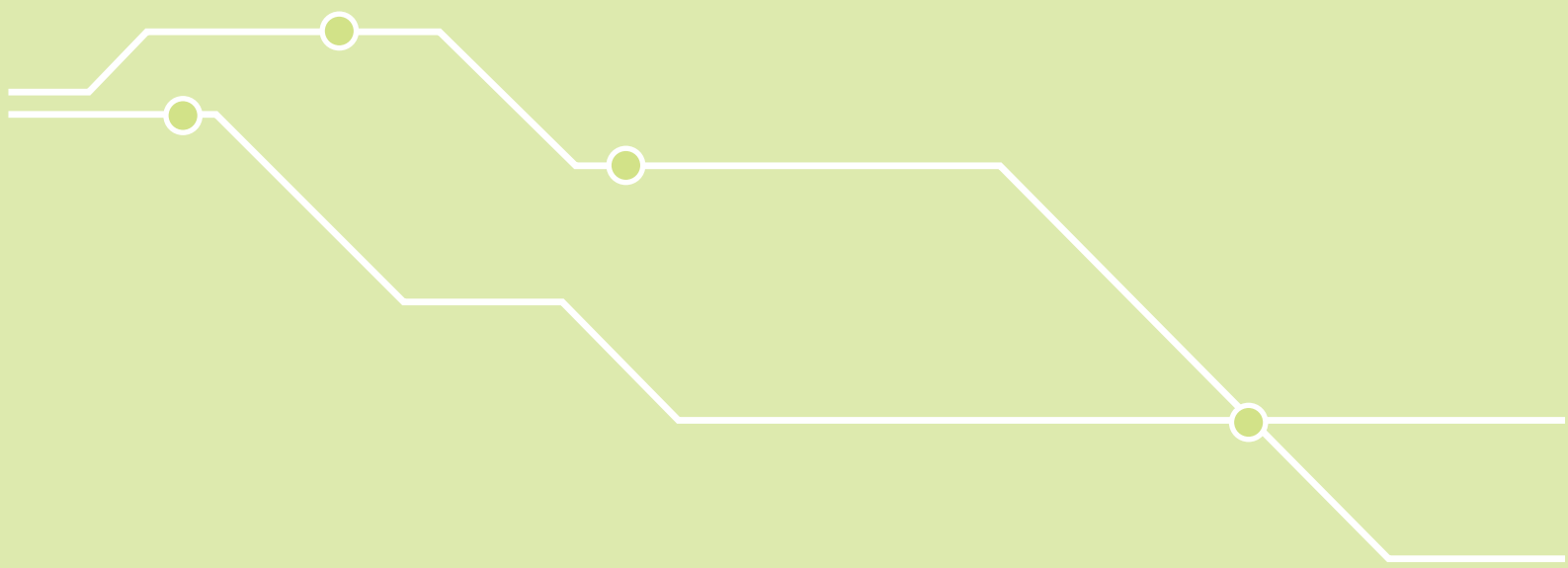
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The State of Pakistan's Transport Sector



1. The State of Pakistan's Transport Sector

Transport is a key driver of socioeconomic development. Transport allows our people to access jobs, markets, social interaction, education, and other services, enabling people to rise out of poverty and overcome social exclusion. Transport adds value to goods brought to markets, links rural areas to cities and global supply chains, driving economic development.

The Government of Pakistan has invested large amounts of human and financial resources into the development of the transport sector through the China Pakistan Economic Corridors (CPEC) program, the Central Asia Regional Economic Cooperation (CAREC) program and other initiatives.

Pakistan needs to support these large investments with a cohesive policy and planning framework to transform the transport sector into a modern, sustainable and effective one, helping businesses to grow, empowering the creation of new industries and supporting the creation of quality jobs.

This National Transport Policy of Pakistan 2018 (hereafter the Policy) reflects the Government of Pakistan's aim to create a world class transport sector. The Policy provides a vision, governance principles, policy objectives, contributions for each subsector, and the implementation arrangements. An accompanying Master Plan will identify necessary interventions to achieve the vision and policy objectives.

The Policy has been developed through a collaborative process, receiving inputs from many key stakeholders from across federal and provincial government agencies, transport operators, the business sector, academia, and civil society.

1.1 Pakistan's Transport Context: The Current Situation:

Pakistan is a populous and rapidly urbanizing country, with a growing demand for transport.

Pakistan has a population around 210 million, 76 Million of whom live in cities. The population is growing at 2.4% per annum (Pakistan Bureau of Statistics, 2017), and the urban population is expected to reach 50% by 2050 (Planning Commission, 2014; Pakistan Bureau of Statistics, 2017). Pakistanis travel nearly 400 billion passenger kilometres (pkm) each year and this is expected to rise to 1,000 billion pkm by 2030 (estimates based upon Pakistan Economic Survey, 2017).

Pakistan's economy has recorded steady growth, but job creation and investment is an ongoing challenge.

Gross Domestic Product (GDP) growth was 5.3% in 2016-17 and is forecast to increase to 5.8% in 2019 (Ministry of Finance, 2017; World Bank, 2017). Transport itself contributes 22.3% of the services sector GDP and accounts for approximately 6% of the nation's total employment (Ministry of Finance, 2017). However, GDP needs to grow at 7-8% to create an additional 1.5m employment opportunities per annum and investment levels need to improve beyond the current level of 15.8% of GDP (Ministry of Finance, 2017; World Bank, 2017).

The geography and past development of Pakistan lead to four levels of transport flows.

International transport through international gateways, inter-urban via the strategic federal and provincial network, urban and rural transport. Inter-urban passenger and freight transport in Pakistan is primarily via road (94% of all passenger kilometres (pkm) and 98% of freight tonnes kilometres (tkm), wherein 80% is via the National Highway Network and rail (5% of all pkm and 2% of all tkm). (estimates based upon Pakistan Economic Survey, 2017). Urban transport is dominated by the road sector. Lahore, Islamabad-Rawalpindi, Multan, Karachi and Peshawar have developed, or are implementing bus rapid transit systems.

Rural connectivity remains important for equitable growth.

About 118 million people, 60% of the rural population, live in poverty (Ministry of Finance, 2017). Rural accessibility remains low, with only 53% of the rural population living within 2 km of an all-weather road (calculations based upon Rural Accessibility Index of the World Bank, 2017), limits economic growth and development in rural areas.

Development of the transport sector has been unbalanced, lacking a coherent institutional framework and up to date legislation.

Responsibilities for planning and development of transport infrastructure are divided among several ministries. Investments are allocated to projects without attention to long-term strategic goals. Legislation, such as the Motor Vehicles Ordinance 1965, are outdated and need to be revised.

The local logistics industry is under-developed and does not provide cost effective and integrated modern logistics services.

The World Bank's Logistics Performance Index for

2016 ranks Pakistan at 68 among 160 countries for the quality of trade and transport infrastructure (i.e. ports, rail, roads and information technology) and quality of logistics service providers (World Bank, 2016)

Limited level of cross-border transport.

Considerable challenges remain to fully operationalize efficient transit. Border crossing point infrastructure is poor condition, and customs and other procedures have yet to be harmonized with neighbouring countries, often resulting in long delays at the borders.

Poor condition of safety for all road users.

The World Health Organization (WHO) estimates that 25,781 persons were killed in road crashes in Pakistan in 2013 due to many factors, including poor driving skills, limited usage of protective helmets on motorcycles, outdated vehicle standards, poor road design and no routine maintenance. Efforts to improve road safety have, however, fallen short due to a lack of institutional support and funding. In 2016, Pakistan adopted the National Road Safety Framework and Action Plan, but much remains to be done.

Pakistan has a significant railway network but has not been successful in capitalizing on its role as part of an integrated national transport network.

The railway network totals 7,791 km (Ministry of Finance, 2017). Rail has 2% market share of the freight market, and 5% of the passenger market (estimates based upon Pakistan Economic Survey, 2017). This is primarily due to underinvestment in infrastructure, operations, and human capital. Since 2012-13 there have been some efforts to address these shortcomings.

Whilst the aviation sector is slowly growing, there are challenges in terms of the ability of airports to address security concerns and meet global supply chain standards.

Airline passenger numbers have grown slowly compared to global trends - 19.7 million international and domestic passengers in 2015-2016 (Pakistan Civil Aviation Authority, 2016). Pakistan International Airlines (PIA), the flagship carrier, has 60% of the domestic market share and 27% of the international market, is facing several challenges, including financial problems and an inability to compete as shown by its declining market shares. Airports of Karachi, Lahore and Islamabad account for 80% of the total aviation market (Pakistan Civil Aviation Authority, 2016). The limited growth in aviation volume is a result of protectionary policies, high taxation levels, and declining tourism. In addition, relatively high freight charges and coupled with

inadequate cargo facilities at certain airports, have also limited the ability to expand the air cargo market. Major infrastructure development and upgrading of existing airports are well underway to address these concerns.

Poor hinterland connectivity limits the potential of Pakistan's ports.

Karachi Port handles approximately 60% of all Pakistan's seaborne traffic, with 39 million tons of cargo in 2016-17, including nearly 2 million TEU (Twenty-foot equivalent unit) container traffic. Port Qasim handled 27 million tons of cargo, including approximately 1.2 million TEU in 2016-17 (Ministry of Finance, 2017). While infrastructure and operations at the sea ports are generally satisfactory or are being improved, poor hinterland connectivity causes long delays.

There is large untapped potential for inland waterway operations.

Pakistan has an elaborate canal system and several navigable rivers. Inland waterway transport can therefore be a valuable addition to the transportation of rural and industrial freight, as is currently being piloted in Punjab province between Attock and Daudkhel.

Pipelines are an efficient and cost-effective means of transporting natural gas and oil, supplies to terminal facilities and refineries.

Oil pipelines carry about 37% of all petroleum products, rest being carried by road and rail. Oil pipeline connections exist to the ports and the refineries; however they are not yet fully utilized. The implementation of new pipeline infrastructure has commenced at Port Qasim refinery facilities. Several gas pipeline connections are currently under development.

Environmental degradation is of concern.

Nearly 60,000 people die each year from air pollution related diseases in Pakistan and all large cities in Pakistan have severe air pollution problems (World Health Organization, 2016). The transport sector currently contributes about one quarter of the country's CO₂ emissions and requires urgent addressing (World Health Organization, 2016).

Restricted mobility has been identified as a main barrier for women in accessing key services.

Arranging transport is considered a problem for 40% of women in Pakistan in accessing health care (Asian Development Bank, 2015). Car and motorcycle ownership levels by women are lower than for men. Women have to rely on extended family members, neighbours, or public transport for travel, leading to women having limited access to economic opportunity, healthcare, and education.

1.2 Classification of Transport sub-sectors

In approaching the transport sector, it can be classified in accordance to its' end-users, the domains it operates in, its' attributes and the different modes. Each aspect needs to be considered to improve the performance of the sector as a whole (see figure 1).

In this Policy, the following transport sub-sectors are recognized:

(i) Road transport, which includes the federal, provincial and district road infrastructure (including passenger and freight terminals), road transport vehicles, transport operators (owners, operators, and drivers), and road users. Road transport services are classified into public transport and private transport.

(ii) Rail transport, which is primarily provided by Pakistan Railways and increasingly through dedicated companies, and includes the rail network and associated infrastructure, rolling stock, manufacturing and maintenance facilities, dry ports and other assets and services.

(iii) Air transport, which includes all civil airports in Pakistan, domestic and international airlines (including the national flag carrier Pakistan International Airlines), terminal service providers, airways and airport traffic control.

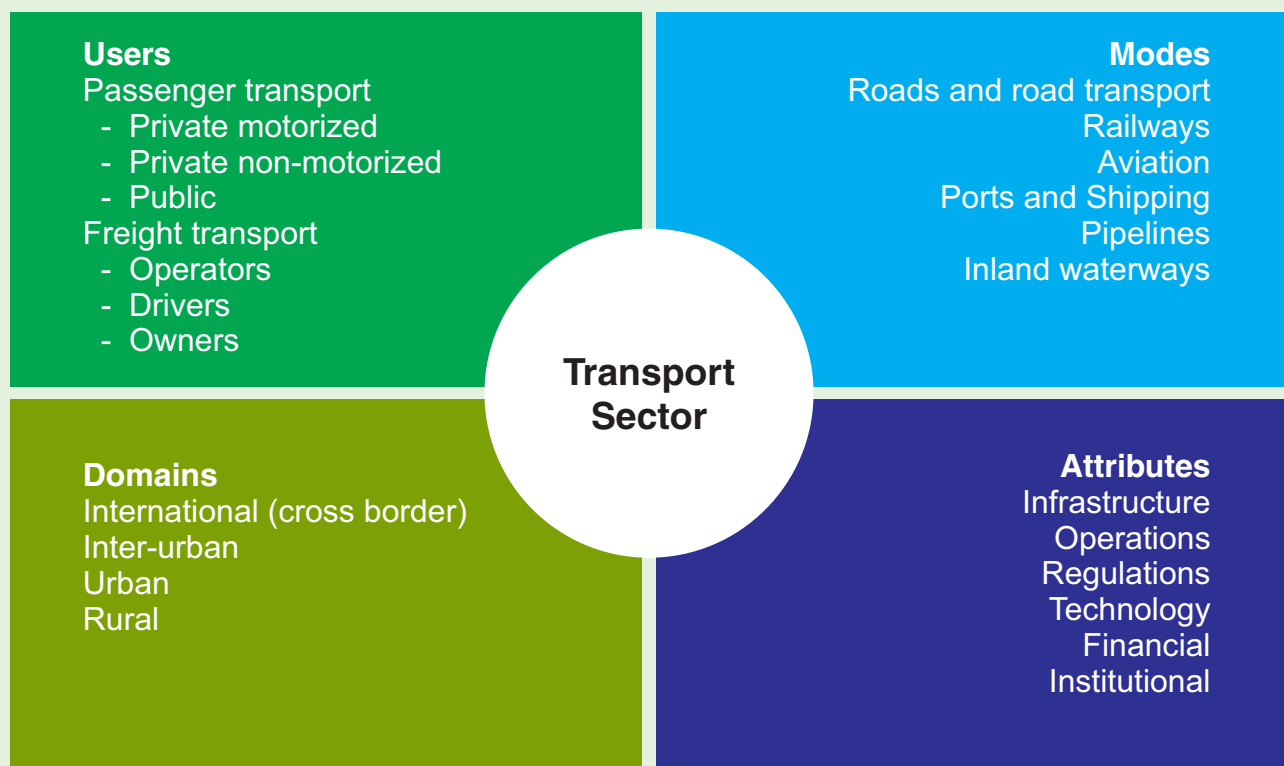
(iv) Maritime transport, which includes the general port and maritime infrastructure and specialized terminals, as well as shipping lines (including Pakistan National Shipping Corporation).

(v) Pipeline transport, which includes mainline pipeline infrastructure, including storage terminals and operations.

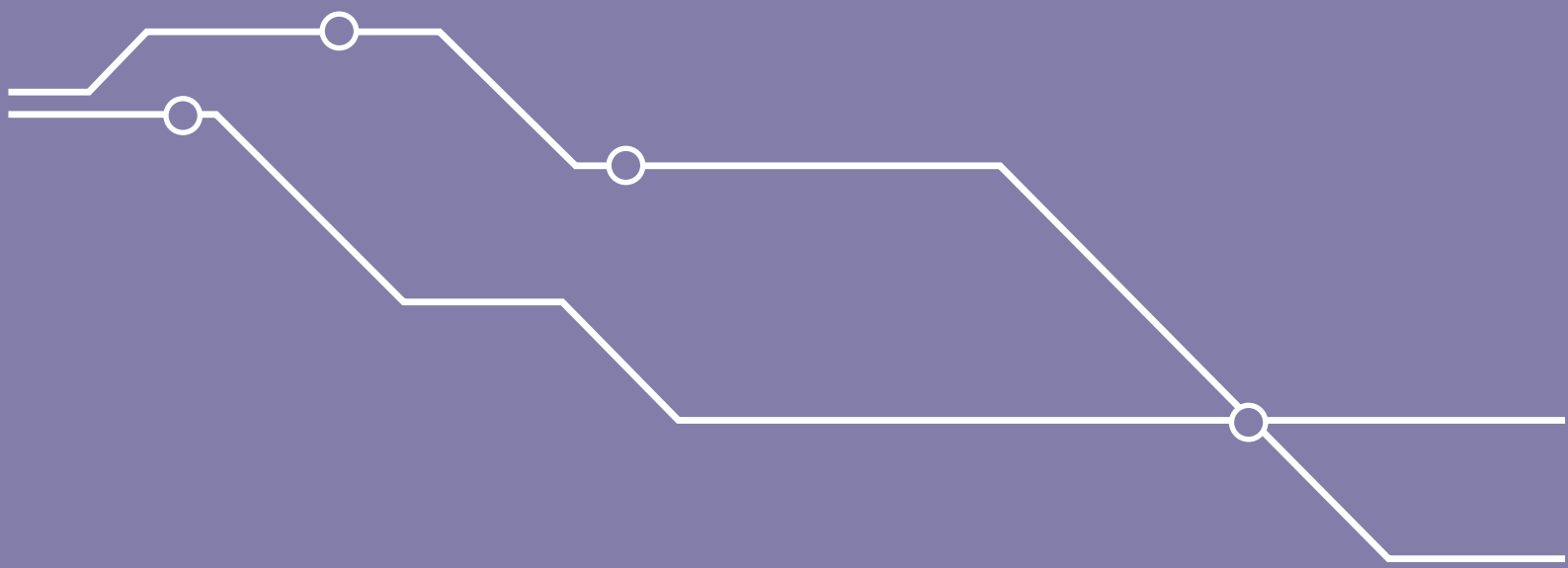
(vi) Inland waterway transport, which includes the terminal and navigation infrastructure, the waterway, ferry and freight services.

(vii) Urban Transport and Multi-modal logistics are identified as cross-cutting sub-sectors where several modes of transport need to cooperate to provide mobility for passengers and movement of freight. Urban transport covers all transportation in towns and cities in Pakistan, including transport infrastructure, public transport (operators), private sector transport, non-motorized transport and transport management. Multi-modal logistics covers the trade and transportation facilitation services to move goods utilizing supply chains, including transportation and warehousing services, for both domestic and cross-border freight movements.

Figure 1. Dimensions of the transport sector



The Need for a National Transport Policy and Master Plan



2. The Need for a National Transport Policy and Master Plan

In view of the challenges facing the transport sector, this Policy is being adopted to guide the overall development of the transport sector in the mid to long-term. A National Transport Master Plan will be adopted for the implementation and delivery of the Policy.

2.1 Contribution to the Pakistan's Government Policies and Plans

The Policy shall be reflective of the priorities of the Government of Pakistan, as stated in various medium and long-term policies and plans of Government.

The role of transport is one of facilitating progressive change towards economic development, preserving the environment and achieving social equity. This includes driving the nation towards higher competitive productivity, following the priorities of the economic activity and associated employment, and enhancing regional trade prospects; whilst at the same time addressing communities and individual's desires for inclusion, security and greater social equity.

The Policy fully supports these priorities and the Master Plan is the means by which these benefits can become a reality.

Contribution to Sustainable Development Goals

Eradicating poverty is the prime goal of the UN Sustainable Development Goals. With up to 30% of our population living below the poverty line, it is fundamental to improve our transport system.

Food security and healthcare will require providing reliable and sustainable transport system. Youth attending schools and higher education, providing opportunities for employment and empowerment of women, demands that our transport system is safe, secure and accessible, and to be inclusive for people with disabilities and elderly to maintain their independence and dignity. Reducing greenhouse gas emissions can only be realised with decisive action to achieving sustainable transport. The Policy will directly impact upon our ability to making progress in achieving the Sustainable Development Goals:

- **Zero Hunger:** Development of an efficient transport supply chain that provides reliable and timely access of agricultural products to markets will contribute to meeting this goal.

- **Good Health and Well-being:** Transport can contribute to this objective by focusing on improving access to essential services, improving road safety, and reducing air pollution from transport.

- **Affordable and clean energy:** Rationalizing the usage and financing of fossil-fuels, as well as shifting to more sustainable fuels, will support the transition toward a clean energy future. It will also avoid high dependence on oil, which will increase in price over time.

- **Industry, innovation and infrastructure:** Developing resilient and sustainable transport infrastructure will help meet travel needs, now and in the future.

- **Sustainable cities and communities:** Providing access to safe, affordable, accessible and sustainable transport systems in urban areas, with a particular focus on non-motorized and public transport will help develop sustainable cities and liveable communities.

- **Responsible consumption and production:** The integration of land use and transport will reduce the requirement for transport vehicles, fuels and other resources.

- **Climate Action:** Strengthening the resilience of transport infrastructure and services, as well as reducing the greenhouse gas emissions is a core of any future developments to adapt and mitigate climate change.

2.2 Relationship with existing policies and transport plans

A sustainable and integrated transport is best achieved when all subsector and related policies are aligned. This Policy sets the overall objectives for the transport sector as a whole.

Several specific policies exist, which are aligned and will be further harmonized with this Policy. This Policy will provide ongoing direction for the subsequent harmonisation of other subsector policies and localized strategies as may be developed by Government.

Related policies (List is not exhaustive)

Automobile Development Policy (2016): Focuses on a future road map for tariffs, vehicle standards and an effective monitoring regime to assist the automotive sector in better complying with international standards.

National Aviation Policy (2015): Focuses on capital and human investments in the operations and infrastructure to ensure a safe, secure, efficient, adequate, economical and properly coordinated civil air transport system in Pakistan.

National Environment Policy (2005): Seeks reduction of emission levels from the transport sector, especially improving the ambient air quality in urban air-sheds.

National Climate Change Policy (2012): Addresses the impact of climate change, by promoting development and adoption of environmentally friendly transport technologies and fuels and other carbon reduction strategies.

National Maritime Policy (2002): Addresses the Maritime sector by amongst other matters, improving the integration and efficiency of ports and shipping within international supply chains. A revised 2017 version is currently with Cabinet for approval.

National Policy for Development & Women's Empowerment (2002): Calls for barrier free transport access and convenient connectivity for all, regardless of gender.

National Policy for Persons with Disabilities (2012): Advocates for barrier-free transport for all, regardless of age, physical, visual, hearing or other disabilities.

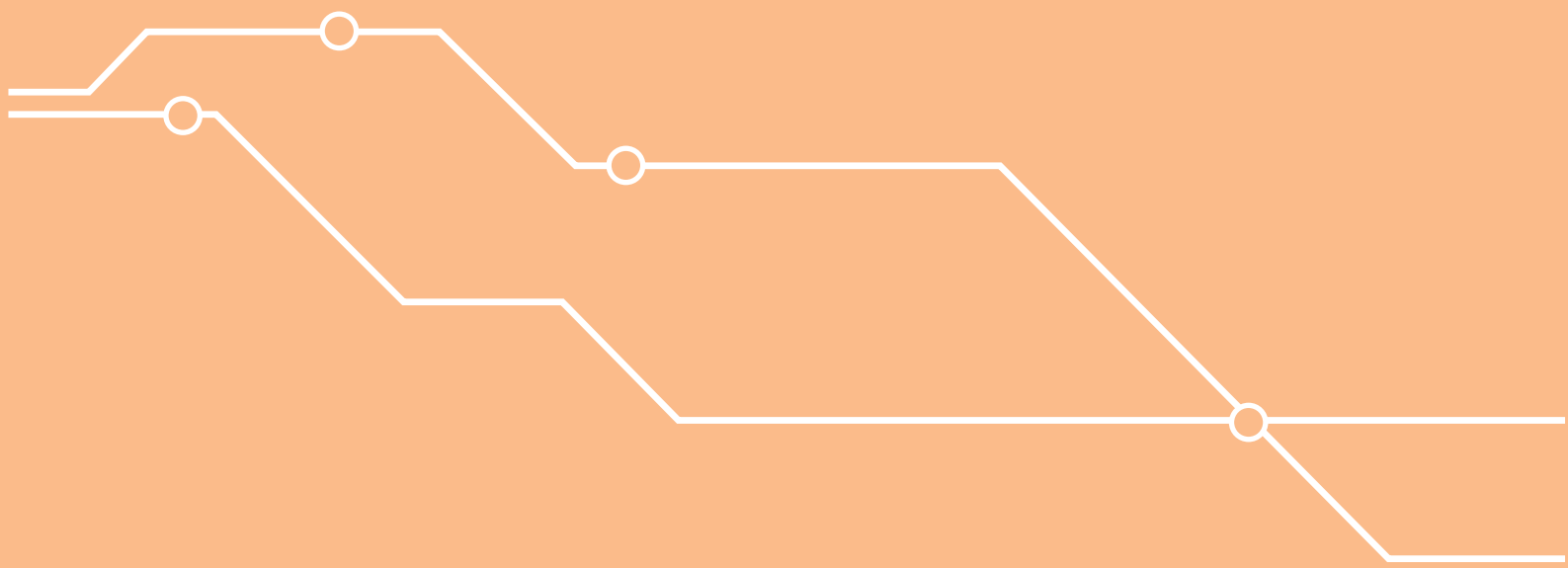
National Trade and Transportation Facilitation Strategy (2016): Calls for improved transit facilities and processes for the transport and carriage of goods and services to and from the international market.

National Trucking Policy (2007): Seeks to modernize and upgrade the sector to comply with international standards in freight vehicle standards and operational capabilities.

Pakistan Railway Strategic Plan (2018): Sets the overall direction for the future development of Pakistan Railways.

Urban Transport Master Plans: Several cities and provinces have developed urban (transport) master plans seeking to address the local issues pertaining to the urban city.

National Transport Vision for Pakistan



3. National Transport Vision for Pakistan

3.1 Vision Statement

The transport sector Vision statement provides a visionary and unifying message which expresses both a desired end outcome, and a preferred pathway to be followed by all stakeholders to achieve that outcome. Such a Vision is as follows:

To support Pakistan in becoming one of the top 25 global economies by 2025 and top 10 by 2047, the nation's transport vision is to:

Provide safe, affordable, efficient, durable, and environmentally friendly means of transport, ensuring reliable access to jobs, markets, education, and other services for all.

Annotation to confirm the essences of the Vision

Provide safety: recognises the importance of improving the safety in service and infrastructure according to international best practices.

Affordable: creating a transport system that is inclusive to everyone.

Efficient: ensuring a system which minimizes travel time and costs for its users.

Durable: able to be sustained over time environmentally.

Friendly: reduces the environmental impact of the transport system, as well as able to adapt to climate change.

Means of transport: recognizes that all modes are involved.

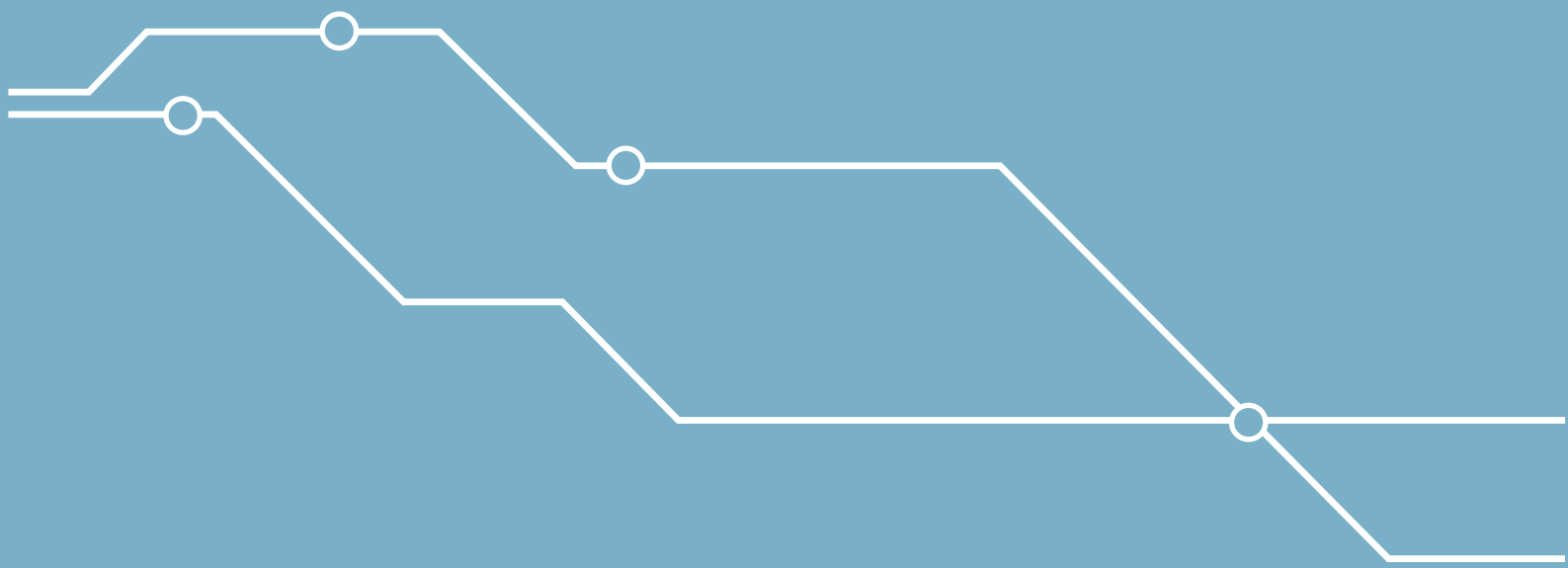
Ensuring reliable access: the essence of the role of transport, connecting individuals and goods in rural areas, cities, between cities and internationally in a reliable manner.

Jobs, markets, education and other services:

providing access to these services that are required to enable people to rise out of poverty, overcome social exclusion and bring goods to market, driving socio-economic growth.

For all: irrespective of location, income, gender, age, race, or disability.

Principles for the Governance of Pakistan's Transport Sector



4. Principles for the Governance of Pakistan's Transport Sector

The principles for the governance of Pakistan's transport sector are the fundamentals upon which the transport sector can further develop. The principles derive from the analysis of the current state of the transport sector (Chapter 1), and aim to maximize existing strengths whilst improving upon areas of weakness. Adherence to these principles is important to meet the policy objectives (Chapter 5). They shall be delivered progressively through actions in each subsector (Chapter 6) and through the implementation arrangements (Chapter 7).

Principle 1. Transport policy shall be objectives-led, and target driven.

Objectives and targets shall guide the development of the transport sector and inform decision-making at all levels of government. These objectives are set in this Policy and targets will be set in the National Transport Master Plan. Targets will be made SMART (Specific, Measurable, Achievable, Realistic, Time-bound). Sector-wide progress against these objectives and targets shall be periodically monitored, reviewed, and reported on, in the Government's Annual Plan and Five-Year Plans. Objectives and targets will be reviewed and adjusted, as part of the 5-year reviews of the National Transport Master Plan, to ensure compatibility with national development plans. Proposed actions will be detailed in the Government's Annual Action Plans. New programmes and projects are evaluated through a revised PC-1 proforma, in accordance with their relevant contributions to the objectives of this policy.

Principle 2. Decisions shall be guided by evidence and data.

In support of Principle 1, the Government will improve the quality and quantity of data and statistics relevant to the transport sector. Processes and methods for data collection will be made consistent across Government. A national transport data observatory will be institutionalized to agglomerate and publish key statistics in a structured manner, for better policy making by the government, analysis by industry and academia, and to inform the general public. Surveys and data collection will be routinely carried out to add to the knowledge base to support decisions on transport sector development. This will improve accountability and legitimacy of transport sector decision-making.

Principle 3. Projects and programs shall contribute to a multimodal and integrated transport system.

An Integrated multi-modal transport sector will be achieved through holistic integrated planning across

all modes, including effective integration with the natural and built environment. All projects and programs will define their contribution to improving the international, inter-urban, rural and urban transport. A hierarchy of modes will be adopted, establishing the primary role for each transport mode in an integrated transport sector:

- (i) Road transport will remain the key provider for local accessibility and connectivity across the country. For road based passenger transport, priority will be given to the use of non-motorized and public transport, providing access to local neighbourhoods, transport hubs and other important destinations. For freight transport, the primary role of road transport will be to provide, via selected corridors, access to and from local markets, ports, airports, dry ports, agricultural areas, mining resources, industrial zones, and logistic hubs.
- (ii) Rail transport in Pakistan will connect urban centres, the ports and specific industrial zones. For passengers, the railways will cater primarily to frequent and direct inter-urban passenger transport services, providing connectivity between urban centres and to public transport hubs. The primary role of rail in the freight sector will be to provide direct long-haul freight transport between industrial zones across the country and to the ports. Inter-regional connections for freight and passengers will be promoted.
- (iii) Air transport will connect Pakistan to international markets from a select number of international airports and will provide long distance (>1000km) domestic travel and connectivity to remote domestic areas. The primary role of passenger air transport is to provide frequent and direct connections to international hubs and provide regional connectivity. For air freight, the primary role is to be an integral part of international supply chains, especially for high-value and time-sensitive freight.
- (iv) Maritime transport connects Pakistan to international markets and promotes integration with international supply chains. Its primary role is to provide efficient and effective carriage of goods to and from overseas, both in terms of direct services and via indirect feeder connections. Opportunities for domestic and regional coastwise passenger and freight services may emerge over the longer term.
- (v) Pipeline transport will cater to the movement of specific commodities namely crude oil, petroleum products and natural gas from gateway ports and land based import terminals to refineries, industrial areas, and large cities.

The pipeline network will also provide for inter-connection and distribution of petroleum products and natural gas between urban area terminals.

- (vi) Inland water transport will cater to local passenger ferry services and the crossing of rivers. For freight, it is to carry medium to long haul freight with intermodal connectivity.

Integrated urban transport plans, with specific attention to public transport, non-motorized transport, and interchange facilities, will be prepared and implemented for all major urban areas of Pakistan to address urban congestion and improving connectivity across Pakistan. Multimodal dry ports and logistics hubs will be developed to ensure efficient and effective movement of freight. International transport facilitation shall be encouraged to harmonize cross border operations.

Principle 4. Whole of life asset management approach shall guide the development of the transport sector.

Whilst investment in new infrastructure will remain important to improving the overall quantity and quality of the transport system, there will be the consummate attention given to the management of new and existing assets. This will require the Government to (i) adopt whole life cycle asset management, including maintenance and operational requirements, (ii) build resilient infrastructure which is capable of meeting future demands and environmental conditions, and (iii) strengthen asset management practices in each subsector. Adopting this principle will bring longer life value of assets, improve all-season accessibility to end-users, offer better value for money, and reduce overall costs (to both the asset owner and the end-user).

Principle 5. Transport sector developments shall principally be guided by the needs of the end-users or, in some cases, by the strategic needs of the country.

Any project or programme will be designed based on the needs of its end-users or in specific cases based upon strategic development needs. Special consideration will be given to the needs and priorities of vulnerable populations including the urban and rural poor, children and youth, elderly, women and disabled. Stakeholder consultations and social surveys will underpin the design and implementation of new projects and programmes to respond and meet user needs as fully as possible.

Principle 6. Coordination mechanisms within the transport sector shall be formalized.

Formal mechanisms shall be instituted to ensure effective coordination between Government at the district, provincial and federal level, as well as between federal Ministries. This shall take place in the form of a Cabinet Committee on Transport, covering all transport modes, with participation from the current federal transport ministries, the provincial and territory governments and with a defined mandate. In the mid- to long-term, the establishment of a Federal Ministry of Transport may be considered.

Principle 7. Clear separation of roles between the policymaker, regulator, and operator shall be pursued.

Regulatory and policy setting functions shall remain core responsibilities of the Government and will be distinguished from the operations and management of transport services. The Rules of Business and the relevant legislation shall reflect such distinctions.

Principle 8. Public sector funding shall be directed in a targeted manner, with systematic exploration of alternative funding sources.

Investments will reflect the priorities of this Policy. Accordingly, once a decision to prioritize a project is taken, the financing should accord with this prioritization. Alternatives to public sector funding will systematically be explored for all projects. Where private sector participation is able to provide the necessary funding, efficiency and value for money in the implementation, maintenance and operation of transport infrastructure or a service, such arrangements will be considered. This will improve the financial sustainability of the transport sector, and help target public funds to where they are needed the most.

Principle 9. Transport prices shall reflect their true costs.

The price of transport services shall reflect their true costs, including environmental and social externalities. Taxes, levies and excise duties on procurement, usage and decommissioning of transport assets shall be reviewed in light of this principle. Tariffs will be, as much as possible, set to reflect the real costs of the transport sector on a level playing field basis, and will promote the usage of more sustainable transport modes, vehicles, fuels, and infrastructure. Transport subsidies, wherever provided, shall be set on a transparent basis, and targeted to those who need them the most. This will optimize the usage of the transport network by reducing any adverse incentives for specific modes and will encourage a greater usage of sustainable transport.

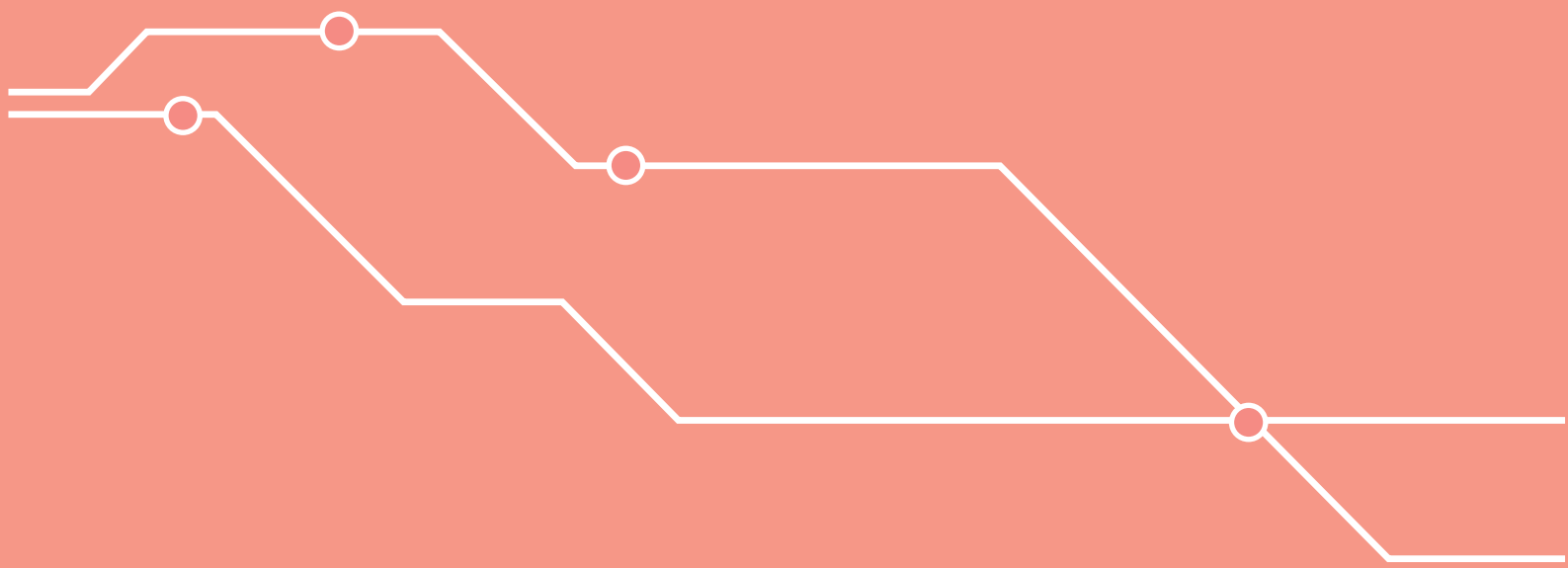
Principle 10. The use of technology and innovation shall be incentivized.

Transport sector organizations will actively pursue the adoption of new technology to fulfil its means. The Government will stimulate innovation through investment in research and development, provision of incentives, and reducing legal and regulatory barriers to the adoption of new technologies. Infrastructure investments will be made in anticipation of megatrends which affect the transport sector at large throughout the world. These include, but are not limited to, driverless electric vehicles, automation, vehicle sharing systems and e-commerce. Such megatrends in technological changes will be assessed at the time of preparing transport master plans, and amended from time to time.

Principle 11. Investment in skills shall take place continuously.

To deliver the necessary reforms required across the transport sector, continuous improvement of the capacity and skills of the sector's professionals will be required. The Government, supported by academia and international development partners, will invest to enhance skills in the civil service in such areas as transport planning, design, engineering, operations, asset management and governance. The Government will set the conditions for the private sector to invest in the skills of driver/operators, transport and terminal operators, and service providers.

National Transport Policy Objectives



5. National Transport Policy Objectives

The policy objectives state the outcomes that the transport sector intends to deliver. Meeting the policy objectives requires directional changes in the transport sector.

Adopted key transport policy objectives are as follows:

1. Improve connectivity and accessibility for all:

An integrated transport network consisting of roads, railways, inland waterways, ports, airports, and pipelines will help all citizens improve access to schools, hospitals, markets, and jobs; improve community cohesion; and also serve effective supply chains.

2. Enhance international competitiveness:

Trade competitiveness will be enhanced through the establishment of efficient international gateways and harmonized operating standards with neighbouring countries and trading partners via ports, airports and land border crossings.

3. Foster sustainable urban development:

Future population and economic growth in cities and towns will be facilitated in a sustainable manner through effective land use planning and traffic management.

4. Facilitate equitable growth across Pakistan:

Transport will help to facilitate economic growth of all regions of Pakistan, especially those which lag behind the national average by targeting investments, focusing subsidies and skills development in such areas.

5. Make the best use of existing and new assets:

All transport assets will be maintained and utilized to their maximum potential to provide value for money and lowest whole of life costs.

6. Maximize user-friendliness and consistency of transport services:

Customer requirements will be met through the enhancement of operational performance by encouraging competition, harmonizing standards and regulations, strengthening enforcement and compliance, developing a level playing field and strengthening governance structures.

7. Ensure safe travel for all transport users and surroundings:

The transport system will be safe and secure for all its end users and surroundings.

8. Preserve and conserve the environment:

The transport system will minimize adverse effects on the environment.

Objective 1:

Improve connectivity and accessibility for all

An integrated transport network consisting of roads, railways, inland waterways, ports, airports and pipelines will help all citizens improve access to schools, hospitals, markets, and jobs; improve community cohesion; and also serve effective supply chains.

Sub-Objectives:

- 1.a. Improve direct connectivity between communities and between economic zones by enhancing access to national and provincial highway networks, modernizing and expanding the rail, pipeline and inland waterways network.
- 1.b. Develop multimodal connections and provide seamless transfer between transport modes by increasing physical and system integration between transport modes and improving interchange facilities.
- 1.c. Improve travel time and travel time reliability along key economic corridors by addressing infrastructure bottlenecks and adopting intelligent transport measures.
- 1.d. Develop new, and improve existing supply chains by improving facilities at dry ports, ports, borders and railway stations and enhancing logistics operations.
- 1.e. Increase all-season accessibility to remote areas and local communities by applying climate resilient design, construction and maintenance standards to the transport infrastructure.
- 1.f. Improve the accessibility to transport for women and vulnerable groups by identifying and removing any barriers hindering their access.

Objective 2:

Enhance international competitiveness

Trade competitiveness will be enhanced through the establishment of efficient international gateways and harmonized operating standards with neighbouring countries and trading partners via ports, airports and land border crossings.

Sub-Objectives:

- 2.a. Improve connectivity with international trading partners by advancing competitive international shipping, aviation, rail and road haulage services and enhance the capacity of international corridors.

- 2.b. Provide unencumbered access to and from international gateways by enhancing capacity, developing direct connections and implementing traffic management measures.
- 2.c. Provide efficient and effective transshipment at international gateways by improving the planning, operational productivity, and enhancing intermodal integration.
- 2.d. Ensure that capacity is adequate to address the current and expected growth in international freight and passenger flows by developing and implementing long-term master plans for the international gateways.
- 2.e. Provide seamless operations at international gateways by acceding to and implementing the relevant international transport conventions and establishing and implementing interface agreements with neighbouring countries.

Objective 3:
Foster sustainable urban development

Future population and economic growth in cities and towns will be facilitated in a sustainable manner through effective land use planning and traffic management, and greater promotion and implementation of sustainable transport modes.

Sub-Objectives:

- 3.a. Integrate urban land use planning and transport development in accordance with the principles of Transit Oriented Development, facilitating improved public transport connections and limiting urban sprawl along bypasses.
- 3.b. Facilitate and encourage non-motorized transport in urban areas by upgrading the streetscape, developing new non-motorized transport infrastructure, managing parking, and developing a supporting regulatory framework.
- 3.c. Improve the quality and accessibility of public transport by increasing the coverage, modernizing the fleet and facilities, implementing supporting traffic management and revising concession and licensing regulations.
- 3.d. Improve urban freight logistics by improving traffic management on main corridors, promoting intelligent transport systems and implementing an enabling regulatory framework.
- 3.e. Improve liveability in urban areas by implementing traffic calming measures, promotion of sustainable transport, implementation of cleaner fuels to reduce air pollution.
- 3.f. Improve transport safety and security within urban areas, to ensure that everyone is able to take advantage of the wide range of transport services within urban areas.

Objective 4:
Facilitate equitable growth across Pakistan

Transport will help to facilitate economic growth of all regions of Pakistan according to their potential, especially those which lag behind the national average, by targeting investments, focusing subsidies and skills development in such areas.

Sub-Objectives:

- 4.a. Boost local employment opportunities and economies through targeted transport investments.
- 4.b. Link investments with marketing efforts to improve local job opportunities, including in the agriculture, services and manufacturing sectors.
- 4.c. Support local development strategies by facilitating sustainable transport access and aligning transport developments.
- 4.d. Maximize access to specific areas, such as special economic zones, to unlock their potential to improve socio economic development.
- 4.e. Provide affordable transport services to the poor and to less developed regions by implementing targeted subsidies.

Objective 5:
Make the best use of existing and new assets

All transport assets will be maintained and utilized to their maximum potential to provide value for money and lowest whole of life cycle costs.

Sub-Objectives:

- 5.a. Improve the level of utilisation and efficiency of existing and new transport infrastructure by prioritizing investments in accordance with relevant economic and social criteria and by improving competition between and within modes.
- 5.b. Reduce freight vehicle overloading by reviewing and updating existing standards and regulations, developing and implementing an implementation strategy and enforcing compliance with vehicle construction safety and loading standards.
- 5.c. Optimise the cost of transport by applying pricing principles and user charges (inclusive of taxes, levies, tolls) that improve utilization rates, whilst ensuring affordability.
- 5.d. Maintain the transport system at a level which preserves the value of all fixed and mobile assets by ensuring that all assets address future needs, minimizing the whole of life cycle cost and eliminating the maintenance backlog.
- 5.e. Enhance the integration of primary and backhaul transportation operations by promoting market intelligence technology.

- 5.f. Attract private sector funding for construction, maintenance and operations by supporting new contract modalities and strengthening the capacity of PPP cells in all levels of governments.

Objective 6:

Maximize user-friendliness and consistency of transport services

Customer requirements will be met through the enhancement of operational performance by encouraging competition, harmonizing standards and regulations, strengthening enforcement and compliance, developing a level playing field and strengthening governance structures.

Sub-Objectives:

- 6.a. Harmonize transport infrastructure, service design, and operations by updating and implementing legislation, setting national transport standards and norms, and adopting service level agreements (SLA) between federal and provincial & territory governments, and between provincial and local governments.
- 6.b. Improve planning processes and collaboration across transport institutions by constituting a Cabinet Committee on Transport and a supporting Advisory Committee on Transport that will be made responsible for guiding the development of the transport sector.
- 6.c. Develop a level playing field in the transport sector by reviewing and setting contracting, licensing, financing, regulatory and operational standards in a transparent manner.
- 6.d. Continuously improve the level of service and operational performance of the transport sector by benchmarking, exchanging best practices and investing in research, technology, and innovation.
- 6.e. Adopt intelligent transport systems to manage and operate the transport network more effective and efficient.

Objective 7:

Ensure safe travel for all transport users and surroundings

The transport system, including infrastructure and operations, will be made safe and secure for all modes, its end users and surroundings.

Sub-Objectives:

- 7.a. Improve travel safety and security by adopting, implementing and ensuring compliance with all relevant international transport safety standards and regulations, strengthening road safety, improving driver/operator skills, upgrading vehicle standards and implementing emergency response and accident recovery

protocols.

- 7.b. Improve the safety of transport infrastructure by implementing and carrying out safety audits on all new or improved transport infrastructure projects in accordance with international best practice.
- 7.c. Ensure safe transit and movement of people and freight around and across transport modes by providing adequate alternative infrastructure and complimentary measures.
- 7.d. Promote a safety culture in Pakistan by strengthening the leadership, management and institutional capacity of those agencies tasked with the design and management of transport network systems including safety standards, enforcement, regulation and education and ensure the independence and transparency of safety investigations and safety audits takes place.

Objective 8:

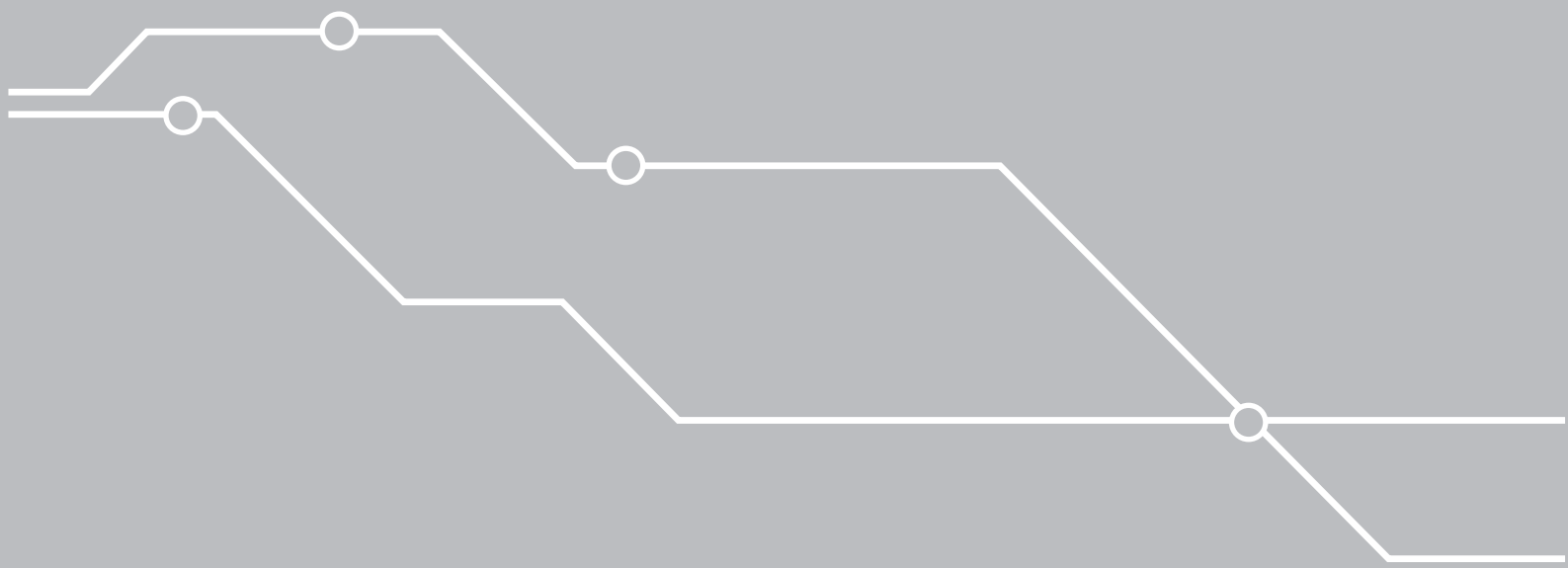
Preserve and conserve the environment

The transport system will minimize adverse effects on the environment.

Sub-Objectives:

- 8.a. Optimize the need for transport through improved and integrated urban planning, transport demand management, effective and efficient supply chains, and promotion of e-communication options (mobile phone use, teleworking).
- 8.b. Reduce transport emissions (air, noise, and vibration) from vehicles by improving emissions and fuel standards, ensuring adherence to such standards, and promotion of sustainable transport modes.
- 8.c. Minimize the environmental impact of infrastructure by complying with environmental impact assessments and the associated mitigation measures.
- 8.d. Mitigate the impact of natural disasters by taking preventions and adaptability measures as well as improve climate change resiliency.

Policy directions for each of the transport sub-sectors



6. Policy directions for each of the transport sub-sectors

Pakistan's determination to develop an integrated transport system will require each transport mode to improve its performance and to be integrated with the rest of the network. This will require linking modal infrastructure to operations, as well as to ensure appropriate regulations, technology, finances and institutions. Achieving this integration and utilizing each transport mode to its full potential, is a critical challenge to be achieved.

Within the respective areas of its comparative advantage, each sub-sector will contribute to the eight policy objectives, while recognizing the need to (i) improve the infrastructure and connectivity across Pakistan, (ii) enhance mobility and transport service delivery, (iii) improve the utilization of the assets, and (iv) provide effective regulations that enable safe, affordable, efficient, durable, environmentally friendly transport.

6.1 Road transport

Overall direction of road transport under the Policy:

- (i) The priority for passenger transport by road will be to enhance the usage of non-motorized transport and public transport. An increased focus will be made to the provision of public transport services and integration to other modes. Private transport will be considered complimentary to non-motorized transport and public transport, and will provide reliable access to low density and remote areas.
- (ii) For freight, the predominant movement by road transport will increasingly be shifted to rail and pipeline, by better integration of agriculture and industry to rail stations, dry ports, and pipelines. An increased focus will be placed upon last-mile connectivity to ports, industrial zones and within urban areas.
- (iii) Rural roads will remain vital for providing accessibility to local communities and public services. Focus will be placed on provision of rural transport services, in addition to providing all-weather road infrastructure.
- (iv) Urban roads will be designed to support efficient and effective urban transport, with priority given to non-motorized transport and public transport.
- (v) Inter-urban roads will offer efficient connections between urban areas and provide integration to the areas they pass through.
- (vi) International road transport will be supported by accession to and implementation of relevant international road transport

agreements and conventions, as ratified by Government of Pakistan.

- (vii) Leasing within the Right of Way shall not be pursued.
- (viii) The level of service¹ provided on the roads will be commensurate with the function of the road.
- (ix) Road safety will be actively promoted through the adoption of the UN endorsed Safe System Approach, including improvements to road safety leadership and management, safety infrastructure with a key focus on speed management and safety of vulnerable road users, vehicle standards regulation including access to and movement on the road network, road user behaviour, and post-crash response.
- (x) Negative impacts of road transport on the environment will be reduced, including addressing vehicle emissions and noise.
- (xi) Modern intelligent transport systems will be adopted to enhance the planning and operation of the road network.
- (xii) Road user charges will reflect the priorities of this transport policy, address the externalities of road users and tolls will only be levied at specific roads if a viable alternative exists.
- (xiii) Root-causes of vehicle overloading will be addressed and eliminated.
- (xiv) Enhancement of road related statistics will be pursued to support evidence-based decision making.

6.2 Rail transport

Overall direction of rail transport under the Policy:

- (i) Railway operation in Pakistan will be organized to become more commercially viable.
- (ii) Railway infrastructure will remain in the public sector. Private sector participation in railway operations and maintenance will be encouraged and promoted, in ways that serve the public interest.
- (iii) Defined railway role in the transport sector will be supported by appropriate levels of investment.
- (iv) A methodology for calculating compensations for meeting Public Service Obligations will be developed, agreed and implemented. The process of getting Public Sector Obligations from the Government, including provincial and local governments, if any, will be initiated as per the agreed framework.
- (v) For passengers, rail transport will prioritize the provision of fast and reliable inter-urban

services between all major urban centres.

- (vi) For freight, rail transport will focus on the provision of long-haul transport, particularly of container, trailer and bulk commodities, to reduce the share of freight moving on the road network.
- (vii) The network will handle a balance of freight and passenger services. A minimum level of passenger service will be defined in line with socio-economic plans.
- (viii) Railway infrastructure will be modernized and expanded to improve capacity, provide connectivity across the country and improve reliability of services.
- (ix) Direct connectivity to, and intermodal connections between the ports, dry ports and industrial areas will be enhanced.
- (x) Dedicated intermodal terminals for passengers will be provided within and near urban areas to connecting public transport.
- (ix) A sustainable asset management regime for both fixed assets and rolling stock will be adopted.
- (xii) Rail safety will actively be promoted.
- (xiii) New technology will be adopted to enhance ease of passenger travel and freight connectivity.
- (xiv) Improve environmental protection, including addressing rolling stock emissions and noise.
- (xv) Fares will reflect the willingness and ability to pay, allowing targeted Public Service Obligations regulations to be considered.
- (xvi) Enhancement of rail related statistics will be pursued to support evidence based decision making.

6.3 Air transport

Overall direction of air transport under the Policy:

- (i) Air transport will be liberalized in accordance with open skies policy on a reciprocal basis to stimulate new entrants establishing new routes and increasing the number of flights to and from Pakistan, without compromising national interests.
- (ii) International long-distance connectivity will be promoted from selected airports, whilst direct connections are promoted for regional and domestic travel.
- (iii) Specific domestic routes for socio-economic purposes will be targeted via Public Service Obligations.
- (iv) A level playing field for both domestic and international airline operators will be established for passenger and freight transport.
- (v) Commercial, market based pricing together with rationalisation of the tax structure in the

aviation sector will be established.

- (vi) Pakistan Civil Aviation Authority will be restructured, separating its regulatory and service provision responsibilities.
- (vii) Pakistan Civil Aviation Authority may enter into suitable public-private partnerships for operation, management and development of airports.
- (viii) Pakistan International Airlines will be restructured and rescaled to become financially viable.
- (ix) The infrastructure capacity and level of service of international and domestic airports will be developed in line with the functional purpose of the airports.
- (x) All airports will be connected to public transport of suitable standards, to commensurate with the status of the airport.
- (xi) Aviation and air travel safety and security will actively be promoted. Investigation of air accidents and incidents and the airport security force will be made independent functions.
- (xii) Negative impacts of air transport on the environment will be reduced, including addressing fuel standards, noise and efficiency of aircrafts.
- (xiii) Enhancement of air related statistics will be pursued to support evidence based decision making.

6.4 Maritime transport

Overall direction of maritime transport under the Policy:

- (i) Maritime sector shall be geared to become a major engine of growth through its support and facilitation of international trade.
- (ii) International ports will play a leading role in the promotion of the country's integration with a growing range of trade partners and global supply chains and supporting regional transit trade.
- (iii) Karachi and Port Qasim ports will serve as the primary international gateway ports for all types of commodity shipments, with Gwadar Port balancing national trade opportunities, transshipment and regional transit.
- (iv) Effective and efficient infrastructure and operational capacity will be provided, addressing expanding maritime economy, freight volumes and potential passenger flows.
- (v) National and port master plans will be developed, with due attention to future capacity constraints, procurement programmes and urban contextual setting integration. A port-city council planning forum will be established to support port

developments.

- (vi) Ports will be operated under a landlord port model. Private sector terminal operators will lead in providing specialist terminal facilities and service delivery. Public sector will provide supportive port and navigation infrastructure and regulatory oversight.
- (vii) Ports' performance in terms of efficiency and effectiveness will be continuously enhanced in terms of provision of seamless integration of ship, terminal, and landside road, rail, and pipeline operations. Further linkages to inland waterways will be considered.
- (viii) Hinterland connections, including dry port integration, will be enhanced.
- (ix) Services supporting the maritime sector will be accommodated within the existing port areas, particularly addressing naval activities.
- (x) Third-party shipping access and provision of maritime shipping services will be supported.
- (xi) Public sector shipping lines will continue to address strategic trade arrangements, whilst being supportive of broader expansion of maritime shipping services capabilities.
- (xii) Coastal port harbour facilities will be promoted, including freight and passenger shipping service concessions.
- (xiii) A sustainable asset management regime for the fixed assets will be adopted.
- (xiv) The governance of port and maritime services will be improved to comply with environmental, safety, and security standards established within international conventions.
- (xv) Enhancement of maritime related statistics will be pursued to support evidence based decision making.
- (xvi) Maritime security will be enhanced for all maritime zones and implementation through maritime security agency.
- (xvii) An independent regulator will be established as national maritime authority.

6.5 Pipelines

Overall role of pipelines under the Policy:

- (i) Oil, gas and bulk liquid will principally be transported via pipelines.
- (ii) Bulk dry commodities will be considered via slurry pipelines or conveyors upon establishment of a supporting business case.
- (iii) Pipeline connections will be established to ports, terminals, refineries, storage depots, dry ports, airports, industrial zones and to periphery of urban areas.
- (iv) Capacity of existing pipelines will be fully utilized and enhanced, including the application of appropriate technologies.
- (v) Safety, security, technical and environmental

standards to comply with applicable regulations and policies.

- (vi) The pipeline system will be independently regulated. Private sector participation will be considered on commercial basis.
- (vii) Public-private partnerships in pipeline systems will be encouraged.
- (viii) Enhancement of pipeline related statistics will be pursued to support evidence based decision making.

6.6 Inland Waterway transport

Overall direction of inland waterway transport under the Policy:

- (i) Inland waterway transport will be promoted as a cheaper alternate, and environmentally friendly mode, and will become an element of intermodal transport services in conjunction and support of rail and road freight and passenger connections.
- (ii) Inland waterway transport will focus primarily upon short to medium lengths of navigable waterways along the Indus River, leveraging for freight and passenger opportunities given its scale economies, uncongested route ways, and low emissions.
- (iii) Freight operations will focus on the handling of dry bulk volumes, together with intermodal container handling.
- (iv) Passenger ferry services will target cross-river linkages, urban transit corridors, and coastal estuaries/ zones, as alternatives to rail and road access.
- (v) An inland waterway transport master plan will be developed, actively exploring other navigable rivers and canals, considering effective riverine water management planning.
- (vi) Environmental, safety and security regulations will be developed.
- (vii) Enhancement of inland waterway related statistics will be pursued to support evidence based decision making.

6.7 Urban transport

Overall direction of urban transport under the Policy:

- (i) Urban transport will be considered as a single integrated transport system and planned in accordance to the hierarchy of modes, including public transport, private transport, non-motorized transport, and freight transport.
- (ii) Individual urban transport master plans will be developed for all major cities in accordance to the principles of Transit Oriented Design, looking at a 10- year timeframe with a 20-year horizon.

- (iii) Public transport will be implemented, covering the metropolitan urban area, integrating the main destinations and to inter-urban transport terminals. Mass transit systems, including bus rapid transit and commuter rail lines will be considered for all cities.
 - (iv) Walking and cycling networks and facilities will be developed and implemented as an integral part of the urban streetscape and will be fully integrated with other modes to minimise use of private motorised transport where possible.
 - (v) Integrated traffic management, utilizing intelligent transport and information systems, will be implemented to manage passenger and freight transport flows. Central urban traffic control systems will be considered for all major cities.
 - (vi) The aspiration or attraction of the use of private motor vehicles in urban areas will be dissuaded.
 - (vii) Parking policy will be established, limiting the parking of private cars.
 - (viii) Air quality will be monitored and interventions will be taken where levels exceed national standards.
 - (ix) Freight will be routed through dedicated freight corridors, limiting urban pass-through transport.
 - (x) For large urban cities, final mile distribution centres will be established where appropriate.
 - (xi) Waterway transport, as a freight and potential passenger transport mode will be actively pursued within cities, where appropriate.
 - (xii) Urban transport authorities will be established to plan and regulate local transport services and to license urban public transport. An enabling legislative framework for existing and emerging transport services will be developed to promote effective sustainable transport.
 - (xiii) Public transport fares will reflect the willingness and ability to pay, allowing targeted Public Service Obligations Regulations to be considered.
 - (xiv) Electric and other low-carbon transport will actively be pursued to reduce greenhouse gas emissions, phasing out of the internal combustion engine.
 - (xv) Safety and security of the urban transport system will be enhanced.
 - (xvi) Enhancement of urban related statistics will be pursued to support evidence based decision making.
- (i) Multimodal logistics will be strengthened to enhance current and prospective domestic and international supply chain integration, including the promotion of domestic distribution, national import and export trade, and regional transit trade.
 - (ii) Intermodal terminals will be expanded and enhanced to facilitate seamless integration of logistics via road, rail, marine, inland waterway, and aviation.
 - (iii) Peripheral freight stations will be developed to connect freight from inter-urban networks to the urban transport networks to tranship to local trucks.
 - (iv) Multimodal logistics will promote a shift towards higher value-added logistics services and from road to alternative modes.
 - (v) The logistics sector will be established as a commercially viable industry that provides effective, efficient and safe freight transport operations in compliance with national and international regulations.
 - (vi) Freight logistics, forwarding, and distribution services will be primarily delivered through private sector enterprises, facilitated and regulated by public trade and transportation facilitation agencies.
 - (vii) Enhancement of service quality, reliability, and cost effectiveness of the logistics sector through the promotion of information and communication technology.
 - (viii) Knowledge and skill bases of multimodal logistics will be made at par with international best practice.
 - (ix) Enhancement of logistics related statistics will be pursued to support evidence based decision making.

6.8 Multimodal Logistics

Overall direction of multimodal logistics under the Policy:

Implementation arrangements

7. Implementation arrangements

The implementation of this Policy shall require the collective effort of all concerned Ministries and Divisions of the Federal Government, as well as all Provinces and Territories.

This Policy shall be coordinated by the Cabinet Division. This responsibility may be entrusted and overseen across all sub-sectors through the Cabinet Committee on Transport. In the mid- to long-term this may be conveyed through a Federal Ministry of Transport.

The Cabinet Committee on Transport shall be constituted by the Prime Minister or Cabinet within 3 months of the approval of this Policy. The Cabinet Committee on Transport will be chaired by the Prime Minister and may include the Ministers responsible for Communications, Maritime Affairs, Railways, Aviation, Petroleum, Inter-Provincial Coordination, Planning and Development, Finance, representation of all the provinces and territories, and other members as deemed appropriate. The Cabinet Committee on Transport will be convened twice a year, and more frequently when and if required.

The mandate of the Cabinet Committee on Transport will be to:

- (i) Oversee all matters, including the development, monitoring and implementation, of this Policy, as well as the National Transport Master Plan framed there under.
- (ii) Oversee all matters, including the development, harmonization, monitoring and implementation, relating to transport policy and all related subsector policies, strategies and plans.
- (iii) Coordinate the development, monitoring and implementation of related policies and local transport strategies and plans.
- (iv) Evaluate performance of the transport sector and take necessary measures for necessary adjustment.
- (v) Consider periodic review of this Policy and National Transport Master Plan for updating as and when required.
- (vi) Mobilize and direct required resources to implement this Policy and National Transport Master Plan.
- (vii) Implementation of any other tasks assigned to the Committee by the Cabinet.

An Advisory Committee on Transport shall be constituted by the Cabinet Committee on Transport

to guide the technical development, implementation, monitoring and evaluation of the Policy and Master Plan. It shall support the Cabinet Committee on Transport in all its tasks to ensure effective coordination among concerned Ministries and Divisions of the Federal Government, all Provinces and Territories.

The Advisory Committee on Transport will include representations from all concerned ministries, provinces and territories, public transport agencies and institutions, with a rotating chairmanship. The Advisory Committee on Transport will be convened at least every three-months and more frequent when and if required. The Transport and Communications Section of the Ministry of Planning Development and Reform shall serve as the Secretariat to monitor the implementation of the Policy and accompanying Transport Master Plan and to provide the necessary support for the Advisory Committee on Transport.

For the implementation of this Policy, appropriate changes shall be made in relevant rules, regulations and modal agreements. In particular:

- (i) To detail the recommendations and actions of this Policy, the Government of Pakistan shall produce a National Transport Master Plan covering a time horizon of 10 years, and to be updated on a 5-year basis, coinciding with updates to the Five-Year Plans of the Government of Pakistan.
- (ii) The Annual Plan of the Government of Pakistan shall
 - incorporate progress on the implementation of this Policy and supporting National Transport Master Plan,
 - detail the actions proposed for the upcoming year.
- (iii) Update the PC1 process to reflect the Policy Principles and Objectives, including the need for a Business case, as guiding tool for a rapid assessment and approval process to be applied to transport sector related investments and reforms.

This Policy will be referenced as the National Transport Policy of Pakistan 2018, Government of Pakistan.

The Government of Pakistan reserves the right to change terms of this Policy in response to changes in national transport needs. Updates to this policy shall be undertaken through an inclusive collaborative effort with key stakeholders as has

been the case for the preparation of this Policy.

Involvement of sector associations

Government of Pakistan may wish to establish a consultative program with sector associations to:

- (i) better appreciate what is important for the private sector,
- (ii) discuss and concur with the required reforms in both legislation, pending sector policies and compliance matters, and
- (iii) other matters which will arise and which will need attention.

Program actions could include a review of the next steps, the sponsoring and implementation of training programs both within Pakistan and at international workshops, the presenting of awards for excellence in the delivery of outcomes of the Policy.

These actions could take place with quarterly meetings at a Provincial/District level and half-yearly reviews of progress and resultant next steps agreed.

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