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Democratic governance is a system in which majority population select their representatives attributing them the responsibility to do welfare works for the citizens. In other words, elected representatives also get the opportunity to fulfil their credible promises made to the citizens. Does this characterization of democratic governance hold in the case of Pakistan? When we examine the extent of poverty, income inequalities, access to justice and human development indicators, we need to examine the prevailing political system and its implications on public sector institutions. The Human Development Index (2017) has ranked Pakistan at 147 out of the 188 countries. The index includes Pakistan in the Medium Human Development bracket, although it is the lowest ranked country within that bracket – behind India, Bhutan, Bangladesh, and Nepal. The report places countries into four distinct categories, namely Very High Human Development, High Human Development, Medium Human Development, and Low Human Development.

All political parties have made numerous promises in their manifestos, including reduction of dropout rate at primary level by providing missing facilities in school. Despite the number of out-of-school children has reduced from last year’s 24 million to 22.6 million, statistics of 2015-16 still paint a gloomy picture, calling for the imposition of real education emergency. As many as 44% children between the ages of five and 16 are still out of school. Despite the commitment of spending 4.5% by PPP-P, 4% by PML-N and 2% to 5% by PTI of the GDP on education Pakistan is at the bottom of the list of those countries allocating the lowest amount of budget for education. Consequently, the literacy rate of Pakistan is in vulnerable situation.

It was committed by PML-N in its manifesto that preference would be given to the female teachers in primary education but the statistics reveal that 21% primary schools in the country are being run by a single teacher while 14% have one room (Pakistan Education Statistic 2015-16). The claims PTI made to enhance education standards for girls could not be materialized. This is evident from the new education policy of Khyber Pakhtunkhwa (KP) government that all institutions having less than 50 students have to be closed down, consequently 150 schools for male and female students were shut down in the period 2015 to 2017. Despite the existence of some regulatory laws in Pakistan to make sure the standardization of education sectors in terms of fee structure and curriculum, private sector educational institutions have largely remained unregulated in the past with no mechanism for inspections, or quality assurance of facilities and services provided by the private institutions. Private schools are accused by parents of uncertain hike in fee without any justification and thus depriving children from their basic human right to education.

As far as health sector of Pakistan is concerned, public sector spending on health sector is partially progressive (Figure 2). The public health services for instance, citizens have to pay for free services; health equipment is often in dilapidated state and health workers, especially in rural areas, seldom report on duty. Even when health staff is present in health facilities, the services are not predictable resulting in frustration and loss of trust by the citizenry in public sector institutions.

**Figure 1: Literacy Rate in Pakistan**

![Literacy Rate](chart.png)

**Figure 2: Total Public Sector Health Expenditure**

![Total Public-Sector Health Expenditure](chart2.png)
There has also been a considerable increase in public health activities in terms of physical infrastructure and workforce (Table 1). The number of doctors, dentists, nurses and LHVs has increased and availability of one doctor, dentist, nurse and one hospital bed versus population has also improved. Today, the doctor population ratio stands at 1: 997, dentist 1: 10658 and hospital bed 1:1584. While national health infrastructure comprises 1201 hospitals, BHUs 5518, RHCs 683, Dispensaries 5802, Maternity & Child Health Centers 731 and TB centers 347, and the total availability of beds in these health facilities is estimated at 123,394. Despite an elaborate and extensive health infrastructure, the health care delivery suffer from some key issues like the high population growth, uneven distribution of health professionals, deficient workforce, insufficient funding and limited access to quality health care services.

<table>
<thead>
<tr>
<th>Table 1: Healthcare Facilities in Pakistan</th>
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</thead>
<tbody>
<tr>
<td>Health Manpower</td>
</tr>
<tr>
<td>2013-14</td>
</tr>
<tr>
<td>Registered Doctors</td>
</tr>
<tr>
<td>160880</td>
</tr>
<tr>
<td>Registered Dentist</td>
</tr>
<tr>
<td>13716</td>
</tr>
<tr>
<td>Registered nurses</td>
</tr>
<tr>
<td>86183</td>
</tr>
<tr>
<td>Population per doctor</td>
</tr>
<tr>
<td>1099</td>
</tr>
<tr>
<td>Population per Dentist</td>
</tr>
<tr>
<td>13441</td>
</tr>
<tr>
<td>Population per beds</td>
</tr>
<tr>
<td>1557</td>
</tr>
</tbody>
</table>

Source: Pakistan Bureau of Statistics

Notwithstanding the significant investment in health sector over the years, the rate of progress is lower than most other countries. The disease pattern is heavily dominated by malnutrition and poor dietary practices. Moreover, high maternal mortality rate (170 per 100,000), low pre-natal care (29%), low birth attended rate (58%) by skilled staff and the level of child stunting (44%) is much higher than the global stunting rate 25%. SDGs are a national commitment to improve health outcomes. The federal and provincial-governments are developing, implementing and monitoring health sector strategic framework to achieve health related SDGs.

The low or underprovided social services are linked to the political system in which political competitors target specific groups, constituencies and voters. Political targeting to narrow groups of voters influence the quality of education as building schools and hiring teachers are not made on the criteria of enhancing the quality of education. Such type of political dispensation is known as “patron-client” forms of behaviour and relationships which are very personalized, evolving and reciprocal in nature. The outcome and the prevalence of clientelistic relationships have certain implications for policy and social sector outcomes.

Public sector institutional performance is seldom analyzed from political perspective which means, examining the prevailing system of governance with respect to the under provision of public goods and services. The fundamental problem in the existing clientelistic system of governance is the persistence of discrepancy in information among politicians, voters and bureaucracies. Voters are seldom informed about policy preferences, incentives and decision-making structures. As a consequence, distortion in policies can be easily detectable as large segments of the society and voters are uninformed about policy stances of political leaders. For instance, PML-N committed in its manifesto to ensure universal access to affordable food grains in all parts of the country by legislating the “Right to Food” as a fundamental right but the statistics shown in the table below don’t show much of an improvement. Consequently, malnutrition is widespread in Pakistan. 44% of children under 5 are stunted and unlikely to reach their full mental and physical potential. Macronutrient and micronutrient deficiencies and an increase in overweight and obesity are negatively impacting population health and development. Deficiencies in iron, iodine, vitamin A, D, Q, sodium, Biotin, magnesium and zinc are the main manifestations of malnutrition due to which a high prevalence of poor diet causes infectious disease.
According to authorities in Tharparkar district, Sindh province, 99 children and 67 adults (43 men and 24 women) have reportedly died in Tharparkar since the beginning of 2014 due to a combination of chronic malnutrition, a lack of access to effective health facilities, lower than average rainfall in Chachro, Diplo, Khinser, Islamkot, Mithi tehsils (sub-districts), and an outbreak of sheep pox which has killed thousands of small animals. More than 190 children died and 22,000 were hospitalized in Tharparkar district in 2016 because of drought-related waterborne and viral diseases.

The misalignment between the pursuit of narrowly chased political interests organized along patronage system and investing in broad-based policies is the fundamental issue. Considering the demand side, local citizens are unaware as to who is responsible for the provision of social services; they are unable to hold local political leaders to account because of weak and highly personalized social contract. The Right to Information Act is frequently neglected, political parties when in opposition are often more vocal about the information law but resist or become disinterested in its implementation when they are in power. Some may argue that decentralization may resolve the intractable problems of social sector may also have to rethink their stances about the prospects of devolution. According to World Bank (2017), 25 million people defecate in the open (Rural 21% and Urban 1%) in 2014 (Figure 2), which showed significant decline in 2015 but could not resist the upheaval and again rose to 15 million people defecating in open because district WASH budgets are not allocated according to residents’ needs and poverty level.

Moreover, the local Nazims and councilors have very little incentives to convince local citizens of the intended benefits of decentralized governance system. Without predictable resource outflows, communicative strategy, institutional capacity, configuration of responsibilities and jurisdictional mandates across the devolved sectors, decentralization may serve as an institutional arrangement complicating and exacerbating federal and provincial relationships.

Improving the provision of service delivery has recently gained currency in establishing state-legitimacy, a paradigm becoming increasingly important in understanding people’s perceptions about the state. Under Sustainable Livelihoods Research Consortium (SLRC) research undertaken by SDPI, the evidence points directly to the negative perceptions of citizens concerning state legitimacy. In Pakistan, the crisis of state-legitimacy is related to weak state and institutions, blurred state-society relationships and exclusionary politics. The idealistic notion of democratic governance remains an elusive goal, instead building effective state and ensuring state legitimacy are plausible alternatives worth considering and pursuing by the future government.

Table 2: Food Availability (Kg) Per Capita per Annum

<table>
<thead>
<tr>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cereals</td>
<td>Kg</td>
<td>161.0</td>
<td>162.0</td>
<td>162.0</td>
<td>162.0</td>
</tr>
<tr>
<td>Pulses</td>
<td>Kg</td>
<td>6.5</td>
<td>7.0</td>
<td>7.0</td>
<td>6.5</td>
</tr>
<tr>
<td>Sugar</td>
<td>Kg</td>
<td>32.0</td>
<td>32.0</td>
<td>32.0</td>
<td>31.5</td>
</tr>
<tr>
<td>Milk</td>
<td>Ltr</td>
<td>169.80</td>
<td>170.0</td>
<td>170.0</td>
<td>170.2</td>
</tr>
<tr>
<td>Meat</td>
<td>Kg</td>
<td>13.13</td>
<td>13.10</td>
<td>13.80</td>
<td>14.5</td>
</tr>
<tr>
<td>Poultry</td>
<td>Kg</td>
<td>5.74</td>
<td>6.10</td>
<td>6.03</td>
<td>6.02</td>
</tr>
<tr>
<td>Eggs</td>
<td>Dozen</td>
<td>6.0</td>
<td>6.0</td>
<td>6.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Edible Oil/ Ghee</td>
<td>Ltr</td>
<td>12.6</td>
<td>14.0</td>
<td>14.0</td>
<td>14.5</td>
</tr>
</tbody>
</table>

Source: Ministry of Planning, Development and Reforms

Figure 2: Number of Open Defecators in Pakistan

Figure showing the number of open defecators in Pakistan from 2014 to 2017.
The budget (2017-18) introduced some corrective measures for the corporate sector such as the abolition of tax on bonus shares and phasing out of super tax as well as tax on undistributed profits. Reduction in sales tax on fertilizers is also a welcome move.

Total Public Debt (TPD) was Rs6.12 trillion in 2008 when the PPP government came into power. In 2013, when the PML-N took over, the TPD was Rs14.31 trillion. The next government would inherit a TPD of Rs22 trillion, which is bound to increase.

There are at least three contexts in which the federal budget 2018-19 may be analyzed. First is from the perspective of former prime minister Shahid Khaqan Abbasi and former finance minister Miftah Ismail. Second is in macroeconomic context, and third is to assess whether this budget meets the socioeconomic challenges Pakistan faces today.

Both Mr Abbasi and Mr Ismail belong to the business world. In fact, their political accomplishments came much later than their business accomplishments. Both have a firsthand experience of dealing with tax collection machinery. Mr Abbasi, in his maiden speech as premier, had resolved to ban the issuance of licenses for prohibited bore weapons and simplify the tax regime.

Thus, it came as no surprise that budget 2018-19 departed from the decade-old policies for revenue collection. Apart from tax amnesty scheme (whose fate lies on approval of finance bill), relaxed policy on the valuation of real estate properties with the right of the government to acquire under-declared properties, restriction on purchase of real estate and new vehicles by non-filers, steps to stop misuse of ‘gift scheme’ for the import of vehicles, abolition of presumptive tax regime for commercial importers, introduction of a threshold for immunity on foreign remittances, and substantial reduction in tax rates for individuals, including salaried class are some out of the box measures coming from two practitioners, who have been dealing with FBR for years.

One can argue that such out of box solutions should be proposed by a government in its first year rather than in the last month of power. However, the counter argument is that the current prime minister and finance minister availed the first available opportunity to present their economic vision. There is nothing wrong in it, but the problem is fitting in this vision the larger macroeconomic picture.

Like previous budgets of last few decades, the current budget is also a formula budget, which is quite static and non-flexible. Net federal receipts are budgeted at Rs5.66 trillion. After paying provincial share (Rs2.590 trillion), the federal government would have Rs3.07 trillion. It faces a shortage of 41.4 per cent (Rs2.17 trillion) as its spending on “four Ds” (debt servicing, defence and security-related expenses, day to day running of civil government, and development) amounts to Rs5.24 trillion.

The first three expenses are non-negotiable, non-discretionary and totals Rs4.78 trillion. These include Rs1.62 trillion for mark-up payment, Rs1.10 trillion for defence affairs and services, Rs0.6 trillion for foreign loan repayment, Rs0.46 trillion for running of civil government, Rs0.34 trillion for pensions. To take care of these mandatory expenses, the federal government needs to borrow Rs1.71 trillion.

Then comes the development expenses both within and outside Public Sector Development Programme (PSDP). With a negative balance of Rs1.71 trillion, the federal government has to assess how much more it can borrow for this ‘discretionary’ expense. Anything left over from first three expenses would be the real size of PSDP. In the current year, it was budgeted at Rs 1 trillion, revised to Rs 0.75 trillion. For the next year, it is budgeted at Rs 0.80 trillion. In fact, any room to manoeuvre for the next government if it wants to deviate from Abbasi’s budget would be Rs 0.80 trillion. In other words, after taking care of mandatory expenses, the discretionary expenditures for next government would be only 2.07 per cent of GDP, unless it plans either to borrow more (increase in total public debt), provide conducive environment for documentation of economy and broaden the tax net (implement Abbasi’s vision in letter and spirit) to reverse some of the revenue cutting measures proposed by Abbasi and offend existing taxpayers, or to rely on indirect taxes to generate more revenue (regressive tax, penalizing the poor).
Total Public Debt (TPD) defined as debt of government serviced out of consolidated funds and debts owed to IMF was Rs3.69 trillion in 2003, it was Rs6.12 trillion in 2008 when the PPP government came into power. In 2013, when the PML-N took over, the TPD was Rs14.31 trillion. The next government would inherit a TPD of Rs22 trillion. TPD is bound to increase in next five years, not only for debt servicing of the existing debt but also to take care of fiscal and current account deficits.

To me, fiscal deficit target (4.9 per cent of GDP where 1 per cent of GDP is Rs 0.385 trillion) is quite unrealistic. Apart from domestic and external borrowing, the government plans to meet its deficit from Rs0.285 trillion provincial surplus. This provision is made despite the fact that a surplus of Rs0.274 trillion was budgeted in the outgoing budget. However, instead of giving surplus, provinces went in deficit of Rs0.163 trillion.

The budget also proposes Rs0.1 trillion in its tax revenue as gas infrastructure development cess (GIDC). In the outgoing budget, Rs 0.11 trillion was expected from this head, but the government could get only Rs0.015 trillion. The GIDC is challenged in court by the provinces and it would be naïve to expect this Rs0.1 trillion in the federal kitty from this head. The provincial surplus and GIDC amount to Rs0.385 trillion which is 1 per cent of GDP. Thus, the fiscal deficit would be 5.9 per cent of GDP if all other factors remain constant.

However, other factors only remain constant in chemical labs. In real life, things work differently. The revenue lost due to tax reduction measures proposed in the budget would be compensated with indirect taxes and “other taxes”. GIDC is one of the other taxes. Still another is petroleum levy, which is proposed to be increased to Rs30 per litre. This levy ranged between Rs3 per litre in case of light diesel oil to Rs14 per litre in case of high octane. The government has successfully collected Rs0.17 trillion against a budgeted amount of Rs0.16 trillion under this head. Now it plans to collect Rs0.3 trillion from it.

Oil prices are on the rise in international markets (i.e. US$ 73 per barrel). Although Mr Miftah, in his budget speech, assured that increase in levy would not affect petroleum prices in domestic market, one fails to understand where the additional levy would be parked if not charged to consumers. The government does not have the cushion to supply fuel at a subsidized price. Inclusion of revised levy in prices would give rise to energy inflation which would automatically increase the cost of all related items. Not revising the levy upward would mean another half per cent of GDP increase in fiscal deficit, which would take the fiscal deficit to 6.5 per cent of GDP.

Energy circular debt is another challenge for the next government. This debt has surpassed Rs1 trillion (including the amount parked in power holding company). The figure is higher than the PSDP budget and equals to our defence budget for next year. Unfortunately, the budget is silent about it but this is something that the next government should focus upon, in order to set our strategic priorities right.

There is no mention of payments in the budget which the next government would make to loss making Public Sector Enterprises (PSEs). Both the PPP and the PML-N governments had faced opposition from their political opponents on privatization of PSEs. It would be interesting to see the behaviour of political leadership on this issue after the elections. If a political consensus is not forged on how to deal with PSEs then you may like to add another half to one per cent of GDP in fiscal deficit — taking the whole deficit to 7 or 7.5 per cent of GDP.

The budget needs to be analyzed to see what is required in the current socioeconomic situation of Pakistan. Economic Survey of Pakistan released a day before the budget presents a bleak picture of rural poverty. It says that poverty has decreased nationally, but urban poverty, according to 2015-16 data, stood at 12.5 per cent whereas rural poverty was 30.7 per cent. The UNDP’s human development report paints a very gloomy picture about the youth in Pakistan. Majority of them are deprived of educational opportunities, of health and entertainment opportunities and are out of job. The third major challenge Pakistan is facing in the context of changing climate is water (too much of water for few weeks of the year, and extreme scarcity in most parts of Pakistan, for rest of the year).
urban dwellers (who pay income tax) or own shares, or have corporations. Rural development may be a provincial subject, but without budgetary guidelines and concrete steps from the federal government on tackling rural poverty, we may end up in a conflict between ‘the haves’ and ‘the have-nots’ where rural population may perceive that it is being marginalized by urban elites. This perception would play a major role in demand of new provinces, including ‘Janoobi (South) Punjab’ province.

With Rs 0.005 trillion earmarked for Sustainable Development Goals (SDGs), one can imagine the fate of preparedness for SDGs, which if achieved (even partially), may change the plight of the youth and women in Pakistan, and may prepare us to better cope up with climate change.

On the whole, the federal budget provides us out of box solutions for an undocumented economy, but presents an unrealistic target for fiscal deficit. Rural poverty, unemployment and poor preparedness for SDGs would haunt the growth targets in the years to come. To cope with these challenges, the next government (even if the PML-N comes in power again) would have to think out of box and innovative solutions not only for revenue side but also for expenditure side of the budget.
Pakistan’s trade prospects in 2018
Dr Vaqar Ahmed

The past few months have seen a decent uptick in Pakistan’s merchandise exports. The first five months of 2017-18 have seen exports grow by 10.5 per cent over the same period during previous fiscal year. The November 2017 monthly export data indicates a growth of 12.3 per cent in comparison to November 2016.

Similarly, during the first four months of the ongoing fiscal year, large-scale manufacturing has posted a growth of 9.6 per cent. Sectors which have posted positive growth include iron and steel, automobiles, petroleum, food and beverages, electronics, non-metallic products, pharmaceuticals, and textile.

First, Pakistan will need to improve its performance on all indicators of doing business index, which currently ranks Pakistan at 147 out of 190 countries. Second, a key contributor to this declining rank has been the inability to reform national and provincial tax regime across the country.

The tax authorities continue to tax even those enterprises who may have incurred a loss during the reporting year. The arbitrary imposition of regulatory duties on imported inputs and raw material has also hurt manufacturing and exports.

Despite specific recommendations by Tax Reform Commission, there is reluctance on the part of the government to introduce forensic audit which could, in turn, bring down the compliance and transactions costs faced by tax paying enterprises.

Third, export incentives need to incorporate specific timelines for localisation, transfer of technology requirement and binding conditions to find new markets in non-traditional export destinations. Similarly, there is lack of customization in most incentive schemes. For example, textile sector gets to have a tailored export package; other sectors do not enjoy a warm reception in the power corridors.

The pharmaceutical industry’s market size in Pakistan, for example, currently stands at USD 3.5 billion. The same is projected to increase to USD 5 billion by 2020. The share of local manufacturing is now at 65 per cent. Yet this industry is finding it hard to export its output due to lack of well-functioning chemical industry, overly strict control of price regulations, rising input costs in particular energy prices, increased taxes and duties on imported raw material, and lack of compliance with product standards.

Similarly, there needs to be customization of export incentive package to boost Pakistan’s services exports. The encouraging growth in Pakistan’s fintech sector, including lending and payment technologies, crowd funding applications, and insurance technologies is all something which is locally concentrated. The services sector enterprises are not being facilitated to become exporters of sophisticated services with dynamic demand abroad.

The government seems confident that the export incentives, which include a reduction in export refinance rates, long-term export finance scheme, prime minister’s export package, zero-rated sales tax and drawback of locally levied taxes will continue to render favourable results. However, the business community feels that there are limits to what such incentives can achieve. They point towards structural issues which, if not addressed soon, can result in curtailing the achievement of export targets being envisaged for the next Strategic Trade Policy Framework being formulated at the Ministry of Commerce.

This begs the question: whether Pakistan will be able to sustain the recent uptick in merchandise exports during 2018? This question is particularly important as several of CPEC’s early harvest projects will see their completion this year.

One hopes that in 2018 the government will be better prepared with feasibilities of all nine Special Economic Zones (SEZs). As of now we understand that even in the existing industrial estates across Pakistan, it is a challenge to get new electricity and gas connections.

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The services sector enterprises are not being facilitated to become exporters of sophisticated services with dynamic demand abroad.
We understand that potential foreign investors in Pakistan’s information and communications technology (ICT) sector have been concerned about piracy, privacy, and data protection issues. They have emphasized the need to resolve these issues if Pakistan wishes to embrace the fourth industrial revolution. The recent hacking of ATM machines in key urban areas, telecommunication companies selling user data to third parties and a general threat of data breach with high costs of resorting to relief through legal sources ultimately curtail the export potential of ICT sector.

Fourth, a sector-specific regulatory impact assessment is urgently required to gauge the (regulatory) burden on Pakistani enterprises, particularly those who could be future exporters. Consider the case of Auto Development Policy 2016. While this policy has generated interest among potential investors to initiate vehicle assembly and manufacturing inside Pakistan, the status and role of Engineering Development Board may continue to undermine the policy objectives.

EDB still has: a) discretionary powers to decide regarding the permissible list of importable items, and b) power to issue manufacturing certificates. Such powers only strengthen the existing players in the markets and lead to a decline in fair competition. Fifth, a lot of clarity is still required as to why the country continues to sign bilateral free trade agreements (FTAs). With no consensus on how past FTAs have helped Pakistan, the government continues to pursue similar agreements with Brazil, Thailand, Turkey, South Korea and several others.

If we agree that a key motivation for FTAs should be enhancing competitiveness of Pakistan’s exports, then perhaps there is a need for deeper trade agreements which allow for investment cooperation, technology transfer requirements, provisions to enhance services trade, relaxation of visa policies, and currency swap arrangements.

Sixth, the currency regime in Pakistan needs to be made more certain and transparent. The ability of Ministry of Finance to intervene in exchange rate management needs to be curtailed by law. There is very little knowledge within the business community regarding how currency is managed or allowed to float and what may be the implications of an overvalued exchange rate for Pakistan. The business associations within the country have also informed that the government did not undertake any consultation before taking a decision which now allows the use of yuan for trade and financial transactions with China.

Seventh, we need to make 2018 the year when we actually revive our trade with the neighbors. Our trading volumes with Afghanistan, Iran and India remain low. We may also take that extra step of expanding scope of transit trade for our neighbors and actually earn substantial amounts of (transit) fee. Once CPEC’s early harvest projects come to a completion, Pakistan’s key economic priority should be to re-imagine how best it can offer its ‘connectivity dividend’ to the Central and South Asia region.

Eighth, the ongoing infrastructure programmes which strengthen trade logistics need to be expedited. To bring down the dwell time for goods, the already planned border complexes (at Chaman, Torkhum and Wagah) as part of the Integrated Transit Management System of Federal Board of Revenue need to be made operational. This should then also allow Pakistan to open more trading routes with regional economies.

Similarly, elevated expressway to be built by Karachi Port Trust should be expedited to facilitate the inflow and outflow of vehicles carrying the merchandise. While the government has made an effort to make Gwadar port operational for commercial traffic, however the wider business community still lacks knowledge on how to access this port. The prevalent port charges, in particular those of Karachi port, have been termed high in comparison to the region.

Finally, as the country enters the next phases of CPEC, the focus will be on making special economic zones (SEZs) a success for both foreign and local businesses. One hopes that in 2018 the government will be better prepared with feasibilities of all nine SEZs. As of now we understand that even in the existing industrial estates across Pakistan it is a challenge to get new electricity and gas connections.

There are varying views across federal and provincial governments regarding who will bear the expenditure of tax breaks which will be allowed across the SEZs. Perhaps a high-powered inter-governmental coordination committee may be set up to take the planning of SEZs forward.
A dismal trade performance due to rising imports
Rabia Manzoor, Asif Javed & Abbas Murtaza Maken

The stagnant export level and rising imports created a balance of payment crisis in the country during the last five years. The account deficit during the fiscal 2016 was $ 4,867 million, which increased to $12,439 million in the fiscal 2017. The export growth remained negative during the last five years whereas the imports showed positive growth. The reason behind is Pakistan’s reliance upon a few products and markets for exports. None of the major trading partners lie within the South Asian region, which indicates that regional markets are still untapped. Free Trade Agreements (FTAs) also seem to be ineffective in increasing export volume. Imports include commodities, including luxury and consumer items whose demand increased considerably. However, the government has recently announced the new trade policy as Strategic Trade Policy Framework (STPF) for 2018-2023. The policy is keen to increase investment in the country to enhance export volume along with improvement in export competitiveness. FTAs will also be reviewed to address the shortfalls in bilateral trade.

For the last few years, Pakistan’s exports have been showing a declining trend. In the fiscal year 2011-12, the export volume was $23.6 billion. The government had projected export target for $26.9 billion for 2013-14, however a shortfall of $1.8 billion was observed. In the fiscal year 2014-15, the government had set export target of $ 27 billion, but exports could only reached at $ 23.9 billion which was 4.9% less than the previous fiscal, thus missing the target by $3.1 billion. According to latest data of Pakistan Bureau of Statistics, the country had exported goods worth of $ 5.2 billion during July-September 2015-2016 as against $6 billion in the corresponding period last year, which means a decline of 13.93%.

Lower trend in exports is the result of both supply and demand side factors. The structural impediments, including higher cost of production, lack of human resources, higher tariffs and tax rates are making exports of Pakistan uncompetitive at global level. The complex procedures to trade are making it difficult to increase the export volume and exporters are unable to receive rebate on time which creates woes among business community. Pakistani industry has lower production efficiency resulting in low demand of local products in domestic and global markets. Furthermore, the overvaluation of exchange rate also affects the export volume apart from law and order situation and political instability, which restricted the exports growth.

Table 1: Balance of Trade (USD Billion)

<table>
<thead>
<tr>
<th>Year</th>
<th>Exports</th>
<th>Imports</th>
<th>Trade Balance</th>
</tr>
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<td>FY 2013</td>
<td>24.46</td>
<td>40.95</td>
<td>-16.49</td>
</tr>
<tr>
<td>FY 2014</td>
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</tr>
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<td>FY 2015</td>
<td>23.67</td>
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<tr>
<td>FY 2017</td>
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<td>-32.59</td>
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</table>

Source: Pakistan Bureau of Statistics

Since 2003, Pakistan’s trade remained in deficit because of higher imports and lower export volume. Most of the bilateral trade deficits were recorded with China, India, United Arab Emirates, Saudi Arabia, Kuwait, and Malaysia. On the other hand, trade surplus was recorded with United States, Afghanistan, Germany, and United Kingdom. The overall exports decreased by 16.4% in last five years whereas imports growth remained 29.5%. This has further increased the trade deficit of Pakistan and now the deficit is at its highest point in five years. Pakistan has Free Trade Agreements (FTAs) with China, Malaysia, Sri Lanka, Preferential Trade Agreement with Indonesia, and has the Most Favoured Nation (MFN) status in India. But, except China, no one is amongst the major trading partners.

Product Composition of Pakistan’s Export
The product structure of Pakistani export has been...
more or less the same since 2013. The top three exports are textile, rice and leather, which accounts for more than 70% of exports. The extensive reliance on only few products cannot be regarded as an effective way to increase our exports in the long run. Textile exports were $13,540 million in FY15 which reduced to $12,454 million in FY17. Rice exports were $2,038 million in FY15 which decreased to $1,575 million in FY17 whereas leather exports declined from $1,073 million in FY15 to $865 million in FY17. So, all the major exports decreased during the last three years due to which the overall exports volume got affected. The reliance on few sectors also indicates that other sectors are not yet developed to get export earnings or even it is unable to fulfil our domestic needs, which caused a rapid increase in our imports.

The above graph illustrates that 70% of Pakistan’s exports are concentrated to only three products. The share of textile in overall exports increased considerably during the last few years, which indicates that the reliance on a product even increased further. Pakistan’s Export Concentration Markets

Similar to product diversification, Pakistani exports are highly concentrated to a few markets. This lack of diversification of products and markets is one of the barriers that restrict growth making export growth vulnerable as any demand shock can highly affect the trade volume. Since 2013, Pakistan could not expand its export markets as there are only few export markets. Pakistan failed to capture the true benefits from GSP plus status as the exports could not grow up to the desired potential. Similarly, Pakistan heavily relied upon trade with Gulf Cooperation Council (GCC).

This graph shows that Pakistan’s exports are concentrated in few markets only which means no major change has been occurred since 2013 and our exports are going to the same markets. Traders are unable to tap new markets, which make export growth vulnerable. There is a lack of regional integration due to lack of banking channels, infrastructure and tariff and non-tariff barriers.

Initiatives undertaken for Export Promotion
The Ministry of Commerce has established the Services Trade Development Council, which is preparing a Strategic Policy Framework for Trade in Services to boost services exports. A number of measures were announced in this framework with focus on technological development. It aimed to increase the E-Commerce and IT exports for which working groups have been established. Through these working groups, a regulatory framework will be implemented. Exim Bank has also been established to ease the worries of trade financing. The Ministry of Commerce is making serious efforts to develop trade volume for leather, pharmaceuticals and rice sectors through overhauling export development institutional infrastructure.

Brief Overview of Trade Policies
The major focus of all trade policies initiated by the Ministry of Commerce since 2009 was to increase trade volume, address challenges in trade promotion and develop public private partnerships.

Strategic Trade Policy Framework (STPF) for 2009-12
The policy intends to revive the domestic trading activities and international trade through structural transformation in trade sector. The export
competitiveness will be enhanced by addressing the supply side bottlenecks, including energy shortfall and capital cost. The textile and clothing sector will be promoted through Textile Policy in which focus will be on investment, latest machinery and enhancing total factor productivity. The policy also aims to increase the market base along with promoting further trade with major trading partners and with countries with whom Pakistan has trade agreements. Trade in services will also be promoted along with developing domestic commerce through providing transport, storage and warehousing facilities.

Strategic Trade Policy Framework (STPF) 2012-15

STPF for 2012-15 targeted three major aspects for enhancing export competitiveness. The first part deals with interventions aimed to strengthen the existing trade related institutional framework. The second part focuses the export development initiatives to boost export competitiveness. The third part deals with regulatory changes for Import Policy Order and Export Policy Order with the aim to develop the ease of doing business. The other major elements of the STPF for 2012-15 were to focus on regional trade, trade promotion from underdeveloped areas, boosting the local commerce and effective monitoring, and evaluation mechanism.

Strategic Trade Policy Framework (STPF) for 2015-18

STPF for 2015-18 aimed to have more FTAs with major trading partners and also keen to have more access in world markets. The policy also intends to extract maximum benefits from GSP plus status. Improving export competitiveness by better infrastructure, labour productivity and technological developments are also targeted in the policy. Cost of doing business will be decreased and effective tariff and tax regime will be implemented. Research and development will be promoted for achieving product sophistication and diversification.

Conclusion

A variety of structural impediments has led to the lack of competitiveness of Pakistan’s exports and has resulted in the government consistently missing projected export targets. Demand side factors, such as rupee’s appreciation and political instability, have also contributed to the current scenario. Other critical problems entail the lack of diversification in Pakistani exports and the concentration of exports to a few destination markets. Pakistan will have to develop capacity in more sectors to decrease their dependence upon three major exports (textile, rice and leather) that currently constitute 60% of total exports. It needs to explore new destination markets and create systems and networks that facilitate exporters. The government has shown sign of taking steps in this direction, however, there is still a long distance to traverse.

Pakistani exports are highly concentrated to a few markets. This lack of diversification of products and markets is one of the barriers that restrict growth making export growth vulnerable.
Post-budget (2018-19) review of energy sector in Pakistan
Ahad Nazir

Economic operations, growth, and development in any country, area or region depend on the sustainable provision of energy to all sectors of the economic ecosystem. Lack of policy-level focus in Pakistan in this regard has led to several issues, including the continuing energy crisis since 2007, and the accumulation of a huge amount in circular debt. The resultant high cost of energy has further added to the problems faced by the industrial, commercial and domestic end-users.

Economic growth can be directly attributed to the availability of energy. Efforts have been made to quantify the economic cost of power load-shedding in Pakistan in a 2013 report titled “Economic costs of load-shedding in Pakistan”. The report states the economic cost of power load-shedding was around seven per cent of the GDP in 2011-2012. While there are several reasons for the energy crisis, circular debt, primitive and inefficient transmission and distribution system, and an import-dependent energy mix are the major problems.

A major share of investment under the China-Pakistan Economic Corridor (CPEC) is for the energy sector. A total of 17.1 GW of capacity will be built under the CPEC of which around 10 GW will be available by 2019. With this huge influx of power capacity coming in, and with an approximate allocation of around Rs1.6 trillion by the incumbent government, from 2013 till present, all sectors of the economy were hit by a heavy electricity shortfall at the start of summer in the months of April and May 2018. This shows issues in the vision of the government as well as faulty policy formulation and governance in the power sector. The allocations budgeted by the Pakistan Muslim League-Nawaz (PML-N) government from 2013 to 2018 are shown in Figure 1.

The circular debt reported by the Ministry of Finance in November 2017 amounted to Rs427.678 billion. Additionally, Rs450 billion is reported to have been parked in Power Holding Private Limited, which is a subsidiary of the Power Division. Experts suggest that at present the circular debt has soared past Rs922 billion. When the PML-N came to power, the circular debt stood at around Rs480 billion. The debt was cleared but it has now almost doubled. A comparison of circular debt figures for various heads in 2013 and 2017 is provided in Figure 3.
The Asian Development Bank (ADB) in a report, “Sector assistance programme evaluation for Pakistan power sector” published on 26th January 2018 has portrayed at circular debt as the singular symptom for several of the problems underlying Pakistan’s power sector. The report identifies four main reasons for the swelling circular debt. The reasons reported include: a) Unaccounted commercial and technical losses by the National Electric Power Regulatory Authority (Nepra), while determining tariffs for the Independent Power Producers (IPPs), b) negative tariff differentials, c) inability to recover billed amounts from the Discos, and d) increasing inefficiencies and losses in the whole power sector supply chain.

Furthermore, the subsidies provided to the Water and Power Development Authority (Wapda)/the Pakistan Electric Power Company (Pepco) and the Karachi Electric Supply Company (KESC) are also significant contributors to the circular debt. The number of subsidies budgeted over the last few years have been subject to high budget overruns. The overruns were majorly contributed by the inter-Disco tariff differentials. This government has tried to eliminate the overruns by gradually lowering the subsidy provided to the KESC but it shot back to double the budgeted amount during the last fiscal year. Increased subsidy of Rs134 billion has been budgeted this year. The subsidies budgeted, and actually disbursed to the Wapda and the KESC (in billions) are provided in Figure 4.

Figure 3: Head-wise comparison of Payables under Circular Debt in Dec-13 and Nov-17 in Billion Dollars (Source: Ministry of Finance)

Figure 4: Budgeted and Actual Subsidies in Billion PKR (Source: Ministry of Finance)
Another reason mentioned by the ADB for the poor performance of power sector in Pakistan is the inefficient energy mix. The energy mix is dependent on expensive imported fuels and this issue is further aggravated by the diminishing natural gas resources and slow hydropower development. As per the Nepra’s State of Industry Report-2016, 32 per cent of the total generation relied on imported fuel, 31 per cent on natural gas, 30 per cent on hydro, and the remaining on nuclear and renewable energy resources. The current energy mix of Pakistan, as reported by the Economic Survey of Pakistan is provided in Figure 5.

Pakistan is blessed with natural renewable resources, which can help generate clean energy. A shift in focus has been noted during last year where more allocations were made in hydro sector and new initiatives such as competitive bidding have been introduced in the renewable energy sectors including solar and wind power. This year’s budget focuses on continuing investments in previous initiatives including Neelum Jhelum, Dasu Phase-1 and Tarbela Extension 4. The same shift in focus is seen in future planning of the CPEC. The allocation for power sector for 2018-2019 has 18 per cent funds budgeted for coal power plants and remaining for completion of the previously started hydropower schemes.

Following are the major policy recommendation for addressing the issues facing the energy sector in Pakistan.

Firstly, while the hydropower sector has been given the requisite attention to fully harness almost 41.7 GWs of potential reported by the National Electric Power Regulatory Authority (Nepra), there is a need to focus on run of the river (or tributary) small and micro hydropower projects. To keep up with the demand during the winter season, when the water flow decreases, small reservoirs can be constructed to fully utilize the hydropower potential of Pakistan. This will not only provide cheap electricity to the masses but can be used to enhance the efficiency of agriculture sector and help mitigate the threats imposed by floods each year. Pakistan needs to follow in the footsteps of its neighbours such as India, where more than 3,200 small, medium and large dams have been constructed since 2012.

Second, the government should increase focus on sustainable and green energy initiatives such as wind, solar and biomass technologies. Experts are of the view that Pakistan has a potential of around 50 GW of wind energy only in the Sindh corridor, 290 GW of solar energy potential and five GW potential of biomass-based energy. Pakistan is yet to utilize bulk of this potential. Government of Pakistan has reported a two per cent contribution of renewables in power generation this year compared to India where renewable sources accounted for 15.3 per cent of its energy.

Some of the issues that need to be resolved in case of both wind and solar energy is the high volume of fine dust accumulation and high temperatures in the wind and solar potential regions, which can be sorted out using anti-dust and high temperature versions of solar and wind power equipment. Moreover, there is a need for effective data collection with regards to wind especially in coastal corridors of Balochistan.
There has been incentivization of the local industry for generating their own power using solar energy through reverse metering but there is also a need for incentivized manufacturing of clean energy equipment. This will result in reduction in capital cost of the wind and solar power plants, increase in foreign investment, build capacity of local manpower and consequently, reduce the cost of energy.

Third, there is a need for the government to work towards modern state-of-the-art equipment for use in transmission and distribution networks. At present, majority of the equipment being used in switchyards are air insulated systems (AIS), which need to be shifted to internationally used gas insulated systems due to low maintenance requirements, low chances of tripping, lower cost of ownership, integrated instrumentation, rare chances of electrocution, lower weight, less installation time, and lower area coverage requirements.

The government has spent a significant amount on power sector during the last five years but the focus of the investments need to shift to fully control the energy crisis. This can be achieved primarily by eliminating reliance on imported fuels and utilisation of natural resources, and by employing efficient and modern gas insulated type transmission and distribution systems.
Ban, Restrict or Discourage use of Mercury Dental Amalgam to Safeguard Children’s Health
Dr Mahmood A. Khwaja

As a first step, we urge the government to ban or restrict dental mercury amalgam use for children (below 12 years age) to safeguard their health

Mercury is used in dental amalgam, a restorative material that is approximately 50% mercury. Dental mercury enters the environment via many unsound pathways, pollute air and water via dental clinic emissions and releases. As a result, many children around the world are exposed to a double dose of amalgam’s mercury: first when it is implanted in their teeth and a second time when it contaminates their environment.

Mercury is the 3rd most hazardous substance of the world concern to which children are most vulnerable, causing neurological development, reproductive problems, impairing growing brain, nervous system, damages kidneys & fetuses. Deficiencies caused by children mercury exposure during pregnancy or at early childhood due to, among others by mercury releases from dental mercury amalgam, are considered life long, affecting their education and job.

According to an SDPI research on dental sites (private clinic, dental hospitals & teaching institutions) in some main cities of Pakistan, the indoor air at some dental sites found contaminated with alarmingly very high concentration of mercury vapours resulting in extremely high mercury exposure to dental professionals, patients & visitors, including children. SDPI conducted a survey of 75 private clinics where more than 90 dentists were interviewed. Data shows that at 43% clinics, mercury dental amalgam is still in use, 70% dentists prefer not to use mercury filling for children below 12 years of age, pregnant and breastfeeding females and 67% support ban on mercury dental amalgam use (SDPI study reports/publications accessible at www.sdpi.org )

Mercury free alternate material (Composite resins, glass ionomers, ceramics and others are available in the country and according to survey report by Liaquat University of Medical and Health Sciences (LUMHS), Hyderabad, their use is increasing day-by-day.

In many countries, mercury dental amalgam use has already been banned, restricted or discouraged, for children below 12 years of age & pregnant women/breastfeeding mothers.

At present, there is no legislation, specifically for hazardous mercury/mercury amalgam use in dentistry at dental health care centers (private clinics, hospitals & teaching institutions).

It is well reported and well established that

1. Children are particularly vulnerable to mercury: Children’s developing brains and neurological systems are especially susceptible to the neurotoxic
The effects of mercury. The Minamata Convention acknowledges this, noting that Parties are “Aware of the health concerns, especially in developing countries, resulting from exposure to mercury of vulnerable populations, especially women, children, and, through them, future generations.” Therefore, it is important to focus on protecting children from dental amalgam.

2. Mercury-free alternatives are available for children’s teeth:
Mercury-free fillings are available for children. As the World Health Organization report Future Use of Materials for Dental Restoration explains, “Alternative restorative materials of sufficient quality are available for use in the deciduous [milk] dentition of children.” Between the irrelevancy of filling longevity in short-lived milk teeth and amalgam’s higher failure rates in these teeth, using amalgam instead of mercury-free fillings in children can longer be justified.

3. Ending amalgam use in children is a proven phase down step:
The Minamata Convention requires each Party to “phase down the use of dental amalgam.” Ending or restricting amalgam use in children has already proven to be an effective phase down step in other countries.

Bibliography:


4. BIO Intelligence Service (2012), Study on the potential for reducing mercury pollution from dental amalgam and batteries, Final report prepared for the European Commission-DG ENV, http://ec.europa.eu/environment/chemicals/mercury/pdf/final_report_110712.pdf, p.69 (In 2012, the European Commission’s independent consultant elaborated that “With regard to young children, longevity of the restoration is not a relevant concern since baby teeth will fall out long before the restoration fails.”)

Sustainable Development Policy Institute (SDPI) has announced its Twenty-first Sustainable Development Conference (SDC) to be held in Islamabad, Pakistan, from December 4-7. The overarching theme of this year’s Conference is “Corridors of Knowledge for Peace and Development”. The Eleventh South Asia Economic Summit (SAES XI), which is being hosted by SDPI in Islamabad this year, will also coincide with the SDC.

OVERARCHING THEME OF SDC:
The Twenty-first SDC will not only discuss the economic corridor but also other corridors of connectivity and knowledge that can steer us towards peace and development. Looking at the emerging global trends, countries are embarking on following more inward-looking policies, led by the United States with its ‘America First’ rhetoric and the UK’s decision to leave the European Union. Such a direction is raising concerns about how increasing nationalist policies will impact the future of various multilateral trade agreements, global solidarity, social policy, trade and development.

While a few regional organisations and processes may have stalled, the road to development must go on. This growing trend should not be allowed to impact research and development efforts and learning from each other’s best practices. In fact, new collaborative partnerships need to be established on knowledge sharing and building bridges, while simultaneously strengthening old ones.

Development of infrastructure should not be the only indicator of sustainable development. South Asia, in particular, needs to strive for a higher aim - a holistic approach where one is looking at human development as a whole. This region’s future lies in strategic policies that are pro-people where no one is left behind in the uphill task of development. The Sustainable Development Goals (SDGs) aim to ‘transform the world’ by 2030, countries in partnership can strive to achieve this by transforming the region. Ban Ki Moon in his address at COP 22 in 2016 said that there is no Plan B as there is no Planet B. The development thought processes and strategic policies, thus, also need to be founded on this premise.

From poverty, hunger, health and education to climate change, gender equality, water, sanitation, energy, environment and social justice – the Conference will have dedicated sessions on key issues such as these which also form part of the SDGs; and, many more overlapping sub-themes relevant to Pakistan and other countries.

SDC Plenary Sessions: In the SDC plenary sessions, keynote speeches will be delivered by prominent scholars, policy makers and practitioners under the umbrella of the overarching theme.

Journalism Awards Plenary: One plenary will be dedicated to the Journalism Awards and to media professionals’ untiring efforts to raise the issues of sustainable development during the current year.

Recapping the previous SDC: The Twentieth Sustainable Development Conference (SDC) titled ‘Seventy Years of Development: The Way Forward’ from 5 – 7 December 2017 organised by the Sustainable Development Policy Institute (SDPI) will be remembered within and by the development sector of Pakistan and the region for some time as one of the largest congregation of biggest, best and brightest minds coming together in 40 panels, roundtables and podium discussions, many of which were concurrent including four plenary sessions. A total of 269 panellists representing the following 16 countries became part of this mega event: Afghanistan, China, Ethiopia, Finland (Via Skype), France, Germany, India, Italy, Nepal, Pakistan, Thailand (via Skype), The Philippines, Sri Lanka, Switzerland, UK, the
USA. An audience of over 3,000 attended the three-day flagship event of SDPI.

Eleventh South Asia Economic Summit: The Eleventh South Asia Economic Summit (SAES XI) will focus on various topics and issues important for the South Asia region’s current political economy. Apart from the plenary sessions aiming to discuss strengthening of broad-based dialogue across South Asian Association for Regional Cooperation (SAARC) member countries, concurrent sessions would aim to discuss business-to-business and people-to-people connectivity, creating and strengthening trade and investment value chains, regional trade in services, cooperation in energy and water sectors, and strengthening dialogue mechanisms to tackle the impact of climate change in the region.

Since 2008, SAES is being led by a group of five eminent think tanks that have been taking turns to organise the annual event in one of the SAARC countries since 2008. The co-organisers include the South Asia Watch on Trade, Economics and Environment (SAWTEE), Nepal; Centre for Policy Dialogue (CPD), Bangladesh; Research and Information System for Developing Countries (RIS), India; Sustainable Development Policy Institute (SDPI), Pakistan; and Institute of Policy Studies of Sri Lanka (IPS), Sri Lanka. The business community across South Asia also remains an important partner in this meeting. Most notably SAARC Chamber of Commerce and Industries and South Asia Centre for Policy Studies (SACEPS) have been knowledge partners in this effort.

Given the presence of the regional think tank community, this year’s SAES will also discuss how Track 2 and Track 1.5 efforts could support the formal SAARC process in areas such as trade, energy, transport, environment, climate change, disaster risk reduction and water.

The policy recommendations and related output of this Summit are formally communicated to all member countries through the Ministries of Foreign Affairs and the SAARC Secretariat.

CONFERENCE OUTCOMES:
A peer reviewed anthology based on the conference papers presented is launched at the succeeding Conference. In keeping with this tradition, the Twenty-first SDC will launch the SDC 2017 anthology titled ‘Seventy Years of Development: The Way Forward’, along with other publications.

As done so in earlier SD Conferences, SDPI will compile the policy recommendations from the 30 plus panels and plenary sessions which will be communicated to the respective Ministries and at regional level institutions. The compiled recommendations along with detailed reports of the sessions will be published in a special edition of SDPI’s Research and News Bulletin.

The Conference will provide an interactive forum to meet with experts and to find relevant ideas and solutions in an atmosphere of sharing and exploring.

SDC keynote plenary sessions and selected panels will be broadcast live on SDPI’s web-based TV (www.sdpi.tv) for wider dissemination. Notifications on the Conference will be shared on SDPI App.

CONFERENCE FORMAT:
There will be three to four keynote plenary sessions in which prominent keynote speakers will be invited to address significant areas as highlighted in the overarching theme. The plenary each day will be followed by concurrent sessions / panels on sub-themes. The plenary will last for one hour and 30 minutes while the duration of each panel will be two hours with three to five presentations followed by question-and-answer session.

DATES TO REMEMBER:
Submission of abstracts: 1 August 2018
Submission of documents by Indian and Bangladeshi passport holders: 1 September 2018
Submission of documents by all other international passport holders: 15 September 2018
Submission of Conference papers: 1 November 2018
Twenty-first SDC and SAES XI: 4—7 December 2018

CALL FOR ABSTRACTS:
Under the overarching theme, a number of panels based on sub-themes will be organized. Panel titles along with write-ups will be uploaded at the Conference web link mentioned below. Speakers are requested to submit their abstracts corresponding and suitably associated to the panel sub-theme objectives addressing the questions specifically being addressed.
in that particular panel. For details of the panels, authors’ guidelines, submission deadlines, etc., please visit our web link www.sdpi.org/sdc.php

All abstracts will go through a software review for originality and if cleared will be reviewed by an editorial committee. Only those speakers with short-listed abstracts will be informed and will be requested to submit their papers by the deadline, i.e. 1 November 2018. Potential speakers are requested to specify the panel title while submitting an abstract.

List of proposed panels along with their panel write-ups will be made available at www.sdpi.org/sdc.php Please continue to visit the weblink.

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