BALOCHISTAN BOARD OF INVESTMENT AND TRADE

Balochistan Economic Coordination

Gwadar, Hub-Gaddani and Mineral Value Chains

Annual Research Report FY 2025-26

Prepared with reference to the Preliminary Policy Study and Joint Federal-Provincial Action Framework

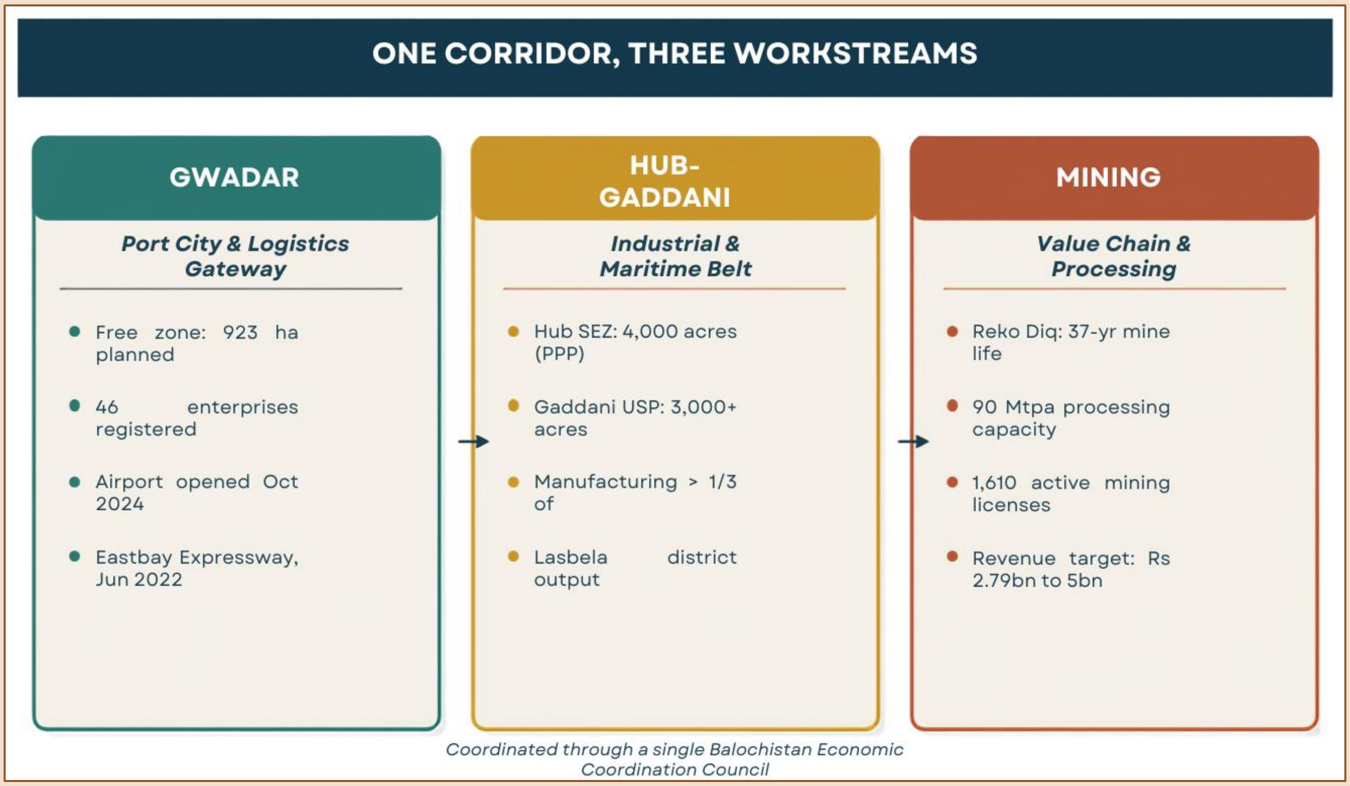
CONTENTS

Term	Meaning
BBOIT	Balochistan Board of Investment and Trade
BCDGS	Balochistan Comprehensive Development and Growth Strategy
BEPA	Balochistan Environmental Protection Agency
BME/PPL	Bolan Mining Enterprise / Pakistan Petroleum Limited
BMEC	Balochistan Mineral Exploration Company
BOI	Board of Investment, Government of Pakistan
BTEVTA	Balochistan Technical Education and Vocational Training Authority
COPHC	China Overseas Port Holding Company
FBR	Federal Board of Revenue
GDA	Gwadar Development Authority
GoB	Government of Balochistan
GPA	Gwadar Port Authority
GSP	Geological Survey of Pakistan
LIEDA	Lasbela Industrial Estate Development Authority
MMDD	Mines and Minerals Development Department
NAVTTC	National Vocational and Technical Training Commission
NTDC	National Transmission and Despatch Company
PHED	Public Health Engineering Department
QESCO	Quetta Electric Supply Company
RDMC	Reko Diq Mining Company
SOE	State-Owned Enterprise
TEVTA	Technical Education and Vocational Training Authority
USP	Unsolicited Proposal
VGF	Viability Gap Funding

01 Overview and Rationale

This component of the annual progress report consolidates the province's three flagship economic workstreams, namely the revival of Gwadar as a port city and logistics gateway, the expansion of the Hub-Gaddani industrial and maritime belt, and the push toward value addition across Balochistan's mineral resources, into a single coordinated narrative. Rather than presenting these as isolated initiatives, the underlying study treats them as one integrated economic corridor whose progress depends on resolving shared constraints in land, utilities, institutional mandates and investment facilitation, rather than on drafting further plans.

Balochistan already hosts Pakistan's only deep-sea port, key segments of the China-Pakistan Economic Corridor, a growing industrial base adjacent to Karachi, and mineral reserves spanning copper, gold, barite, chromite and zinc-lead. Even so, the province's contribution to national manufacturing, exports and logistics has remained below what these assets would suggest, largely because federal entities responsible for ports, customs, SEZ incentives and strategic minerals have not always moved in step with provincial authorities managing land, local services and security.



Headline figures behind the coordination case: free zone investors, Hub SEZ land, active mineral licenses, and the Council's mandate window.

1.1 Purpose and Method:

This component draws on a rapid, evidence-based assessment rather than a fully validated audit, so its figures should be read as a working baseline that will be refined once departmental data rooms are opened. The underlying study combined a desk review of the province's development strategy, official CPEC and port sources, and current public material on Reko Diq, with a constraint diagnostic run across infrastructure, regulation, fiscal alignment, land, security and skills. Where direct operational data were not available, the study relied on proxy indicators such as industrial estate status and publicly reported investor registrations. It is worth noting explicitly that the Hub SEZ and Gaddani figures used throughout this report come from project context supplied directly by the relevant provincial authorities, rather than from a published source, which is why those two figures alone carry no citation. Because the study is preliminary, it should be validated through targeted consultation with the Gwadar Port Authority, the Ministry of Maritime Affairs, FBR and Customs, the Board of Investment, the Ministry of Planning, the Ministry of Energy, the National Highway Authority, QESCO and NTDC, GDA, the Industries and Commerce Department, LIEDA, the PPP Authority, BBOIT, MMDD, district administrations, investors, banks, logistics operators, mine operators and local community representatives before any figure in this report is treated as final. Every finding that follows is organised around four consistent questions: what economic assets already exist, which constraints are binding right now, which opportunities the existing base could support, and which actions require federal, provincial or joint execution.

1.2 Workstream Snapshot:

Workstream	Current Position	Binding Constraint	Recommended Action
Gwadar	Port, free zone, airport and expressway either exist or are complete, but cargo depth and investor throughput remain low.	Weak cargo aggregation, fragmented mandates, and incomplete city services.	180-day Revival Package: cargo commitments, customs facilitation, and a city utilities war-room.
Hub-Gaddani	Lasbela is Balochistan's most industrialized district; Gaddani retains ship-breaking and coastal land.	Land conversion, utility reliability, and an unresolved PPP pipeline.	Fast-track Hub SEZ on 4,000 acres once land is secured; screen the Gaddani USP transparently.

Workstream	Current Position	Binding Constraint	Recommended Action
Mining	Copper-gold, barite, zinc-lead and chromite are extracted at scale but rarely processed locally.	Power, water and logistics gaps, fragmented licensing, and no shared processing infrastructure.	Launch a Mineral Value Addition Programme anchored on Reko Diq, Duddar-Gunga and Khuzdar-Muslim Bagh.

> *The three workstreams function as one corridor, coordinated through a single council rather than three separate reporting lines.*

1.3 Decision Points by Tier:

Three sets of decisions follow from this diagnosis, and each belongs to a different tier of government. At the federal level, the central question is whether Gwadar's cargo generation and the province's mineral logistics should be treated as national trade priorities rather than local development schemes, which would mean binding cargo allocations, customs and port facilitation, a defined federal role in Reko Diq logistics, and closer alignment between BOI, FBR, Customs, Maritime Affairs, the National Highway Authority and NTDC on one side and provincial implementation on the other. At the provincial level, the Government of Balochistan needs to decide whether to build dedicated transaction capacity for land, PPP structuring, mineral processing and estate management, which in practice means immediate land due diligence for Hub SEZ, transparent handling of the Gaddani proposal, and a restructured facilitation model running through BBOIT, the PPP Authority, Industries, MMDD and LIEDA. Jointly, both tiers need to agree a two-year package built around a small number of politically backed and tracked commitments, covering Gwadar cargo, Hub SEZ land and procurement, the Gaddani transaction, mineral pre-feasibilities, shared infrastructure planning and fiscal harmonization, delivered through cabinet-notified action rather than informal coordination alone.

1.4 Immediate Joint Priorities:

Five actions carry the most weight in the short term, and the remainder of this report is effectively an expansion of these five points. Gwadar should be designated a coordinated port-city economic recovery zone with measurable cargo and investor targets. Federal SEZ, customs, tax and port policy need to be aligned with provincial land, water, security and local permitting. A mineral processing and logistics investment pipeline should be built around pre-feasibility studies and anchor off-take agreements. Land and title for the Hub SEZ PPP need to be resolved, and the Gaddani route needs to be defined under the provincial PPP framework. Finally, both governments should commit to a monthly implementation dashboard shared across tiers, since none of the preceding four priorities can be tracked without one. This approach deliberately avoids listing every desirable intervention, and instead prioritizes the actions that unlock multiple investments at once, treating utilities, land, fiscal alignment and clear decision rights as first order constraints rather than as background conditions to be resolved later.

02 Current Economic Situation and Binding Constraints

The province's core challenge is best described as a paradox of high strategic asset value paired with low realized productivity. Balochistan covers the largest territory of any province yet accounts for only about six percent of Pakistan's population, and its scattered settlement pattern raises the cost of delivering roads, power, water and services to where investment is needed most.[1]

Largest	~6%	3
Territory of any province in Pakistan	Share of Pakistan's population	Anchor zones carrying the strongest base

Because industrializing the entire province at once is neither realistic nor efficient, the coordination framework instead concentrates on three anchor zones that already carry the strongest economic base: Gwadar as the port-city gateway, Hub-Gaddani as the Karachi-adjacent industrial belt, and the Chagai-Khuzdar-Lasbela-Hub/Gwadar corridor as the mineral extraction-to-processing spine. Although each zone has a different lead agency, all three depend on the same underlying inputs, namely dependable utilities, secured land, coordinated facilitation, fiscal certainty and a trained local workforce.

2.1 Cross-Cutting Constraints and Responses

Constraint	How It Appears	Why It Is Binding	Recommended Response
Energy reliability & pricing	Industrial estates and coastal cities depend on a mix of grid supply and imported power.	Manufacturing, processing and desalination are all power-intensive; interruptions raise investor risk premiums.	Zone-specific power plans: dedicated feeders, embedded generation, and renewable-hybrid pilots.

Constraint	How It Appears	Why It Is Binding	Recommended Response
Water	Gwadar city, Lasbela's industrial expansion, and mineral processing all face water stress.	Scarcity directly limits industrial plots, worker settlements, and municipal acceptability.	Prioritise desalination, dams, wastewater reuse, and cost-reflective service agreements.
Land and title	Hub SEZ is pending due to unavailable state land; Gaddani has land but needs transparent processing.	Without clean land, approvals and investor mobilization cannot proceed.	A dedicated land resolution cell to complete title, encumbrance and resettlement due diligence.
Fragmented mandates	Ports, customs, roads, tax incentives, land, and security sit across different agencies.	Investors face multiple doors; no single authority owns the end-to-end outcome.	Cabinet-notified delivery cells with delegated decision rights and escalation protocols.
Investor confidence	Private finance is limited and large projects carry long gestation periods.	Policy reversals, land uncertainty and weak services raise the cost of capital.	One-window facilitation linked to bankable projects and standardized concession documents.
Skills and local inclusion	Port, mining, logistics and industrial projects all require specific vocational skills.	Without local employability, projects face social-license risk and import labour from elsewhere.	Project-linked training compacts with TEVTA and NAVTTC, tied to local hiring targets.

03 Gwadar Economic Revival

3.1 Current State and Constraints

Gwadar's economic base rests on a deep-sea port, a free zone, port-related infrastructure, and improving regional connectivity. The port terminal is operational with new cranes, a container scanner and additional storage, while the wider asset base includes the Gwadar Port Free Zone, the East Bay Expressway, and the Pak-China Technical and Vocational Institute [2]. The BCDGS notes that the COPHC took over the development and operation of the Gwadar Free Zone, a period during which the port handled around 400,000 tons of cargo in 2017. The strategy also details the physical footprint of this zone, which spans 923 hectares and is divided into a 25-hectare initial area alongside an 898-hectare northern expanse. Progress has continued since that baseline, as records from the China Pakistan Economic Corridor show that 46 enterprises have already registered to invest in the free zone. A major milestone followed in April 2021 when HKSUN received the first consignment of import and export cargo, signaling the start of active commercial operations.

46	3 Jun 2022	14 Oct 2024	1.2 MGD
Enterprises registered in the free zone [3]	East Bay Expressway completed. [4]	New Gwadar Airport inaugurated. [5]	Desalination plant completed. [6]

Since the province's baseline strategy was drafted, several enabling projects have advanced further, yet Gwadar remains underutilized relative to its strategic promise. Regular commercial cargo depth, container line frequency, warehousing capacity, and investor occupancy all remain below what a self-reinforcing port-city economy would require. Six priorities stand out as binding: cargo aggregation and shipping frequency; utility and municipal service reliability; federal-provincial mandate fragmentation; a free zone business model that has yet to convert registrations into operations; security paired with social license; and last-mile connectivity between the airport, port and city.

3.2 The 180-Day Revival Package

Because the port can only become self-sustaining once cargo owners see predictable service rather than one-off shipments, the revival package concentrates on a narrow set of actions capable of converting existing infrastructure into recurring economic activity within six months.

Component	Lead	First 30 Days	By 90 days	By 180 Days
Cargo aggregation	Maritime Affairs / GPA	Identify cargoes and owners; validate cost comparison.	Approve cargo routing plan and publish SOP.	At least three recurring cargo streams tested or contracted.
Customs & port facilitation	FBR / Customs / GPA	Nominate dedicated officers; map procedures.	Pre-arrival and bonded warehouse processes operational.	Clearance turnaround data reported monthly.
Free zone activation	GPA / COPHC / BOI / BBOIT	Conduct investor status audit.	Aftercare clinic active; top bottlenecks escalated.	Operational or under-construction units increased.
Urban services	GDA / GoB	Compile a utility risk register.	Water, sanitation and waste plan costed.	Service-level commitments for the investor zone and priority neighborhoods.
Community confidence	GoB / district administration	Draft local employment and grievance SOPs.	Training and local procurement targets agreed.	Quarterly community confidence review completed.

3.3 Binding Constraints

Priority	Constraint	Evidence/diagnosis	Economic effect
1	Cargo aggregation and shipping frequency	Port assets exist but recurring cargo streams are thin; without predictable cargo, shipping lines, forwarders and warehouses do not scale.	Low utilization, higher logistics cost and limited investor confidence.
2	Utility and municipal service reliability	Water, power, sanitation, housing and health services remain critical for worker and investor settlement; BCDGS highlights coastal water stress.	Investor uptake is delayed; local support weakens.
3	Federal-provincial mandate fragmentation	GPA/Maritime, Customs/FBR, NHA, Aviation, GDA, district administration and provincial departments control different parts of the investor journey.	No single owner of end-to-end project delivery.
4	Free zone business model gap	Registered investors need customs, banking, import/export, warehousing, labor, dispute resolution and domestic market access clarity.	Announcements do not convert into operational plants.
5	Security and social license	Security improvements must be paired with local employment, services and community engagement.	High transaction costs and reputational risk.

Priority	Constraint	Evidence/diagnosis	Economic effect
6	Last-mile connectivity and city-port integration	Eastbay Expressway helps port-road connectivity, but airport-port-city industrial linkages and urban logistics remain incomplete.	Port assets do not spill over into broad local economic activity.

3.4 Opportunity Mapping

Beyond stabilizing existing infrastructure, Gwadar has five commercial directions it can credibly pursue once cargo and services are predictable. Afghan and Central Asian transit cargo, covering fertilizer, wheat, construction material and containerized goods, remains available provided customs and transit protocols stay consistent. Port-city logistics, including warehousing, cold chains, trucking, freight forwarding, customs brokerage, container repair, bunkering and ship services, can grow around the port once throughput becomes reliable. Fisheries and the blue economy offer cold storage, processing, grading, certification and boat services tied directly to local livelihoods. The free zone itself can support light assembly, packaging, agro-processing, re-export, mineral sample testing, oilfield services and bonded warehousing. Finally, tourism and services, enabled by the new airport, can extend into hospitality, coastal recreation and training, provided security and basic municipal services continue to improve alongside them.

3.5 Institutional Coordination Model

Function	Lead	Supporting Entities	Decision Protocol
Port operations and cargo targets	GPA / Ministry of Maritime Affairs	COPHC, Customs, NLC and private logistics, GoB	Monthly cargo target review, with tariff and facilitation issues escalated to the federal-provincial council.
City services	GDA / district administration	GPA, PHED, QESCOA	Joint utility dashboard, with critical investor service failures resolved within fifteen working days.

Free zone investor facilitation	GPA/COPHC with BOI and BBOIT	FBR/Customs, Labour, Immigration and security	A single investor file for approvals, with a one window response inside fixed service standards.
Connectivity	NHA / Aviation / Maritime Affairs	GDA, GoB Communications and Works	An integrated port, airport and road plan with phased funding.
Security and local inclusion	Home Department / district administration	Federal security agencies, GPA, investors, TEVTA	A security plan coupled with local employment and community engagement commitments.

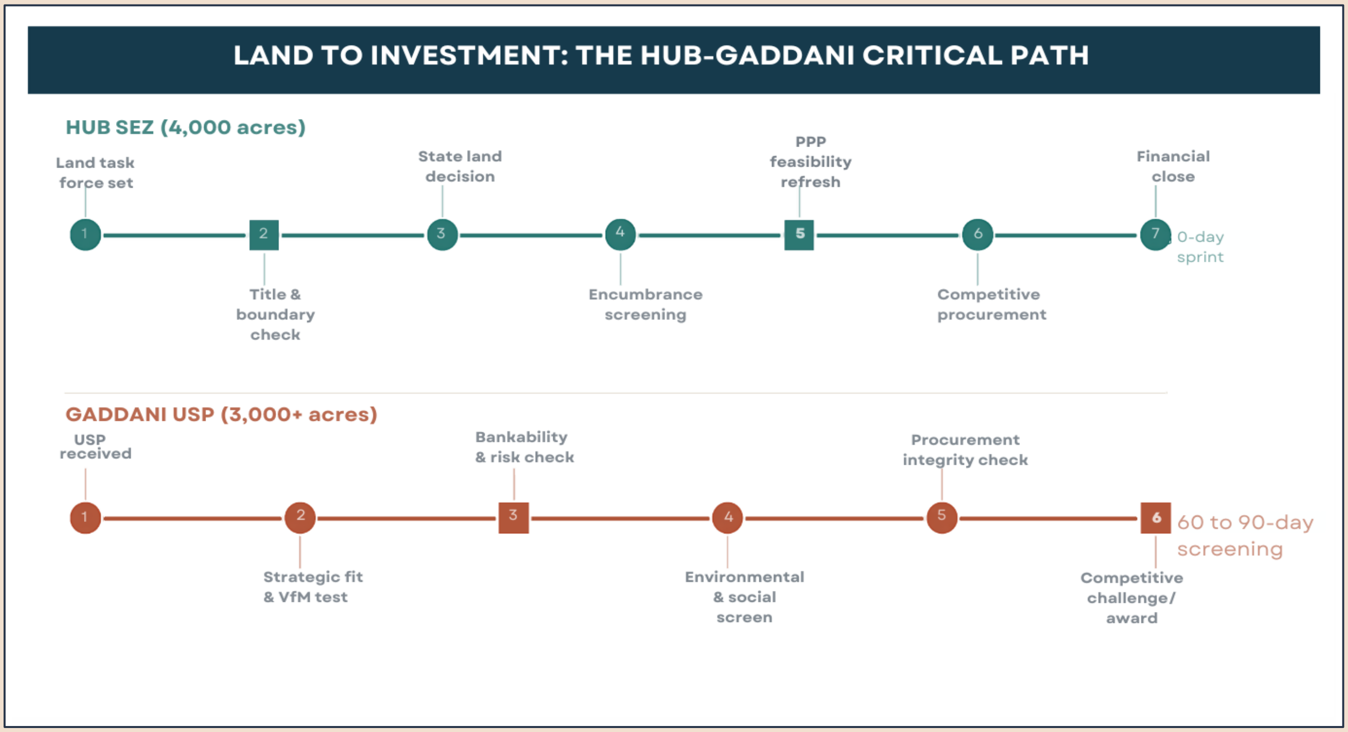
04

Hub and Gaddani Economic Growth

Hub and Gaddani represent Balochistan's most immediate industrial opportunity precisely because of their proximity to Karachi's market, labour pool, finance, and export networks. Lasbela is already one of Balochistan's most developed districts, with manufacturing accounting for well over a third of district output, the highest share in the province. That industrial base is already anchored by a defined set of estates. The Hub Industrial and Trading Estate covers 1,189 acres eighteen kilometers from Karachi and is focused on power generation and plastics, while the Winder Industrial and Trading Estate adds a further 230 acres. Marble City Gaddani covers 600 acres dedicated to marble processing, the Gaddani Industrial Estate covers 50 acres built around ship-breaking, and the Gwadar Industrial Estate accounts for 3,000 acres. LIEDA, which already operates seven industrial estates across Lasbela, had begun Phase II of the Hub estate with an initial scope of 5,000 acres and a master plan covering the first 400 acres.

4,000 ac	**3,000+ ac**
Hub SEZ approved under PPP, pending state land.	Gaddani opportunity under an unsolicited proposal

The Government of Balochistan has approved Hub SEZ for development under a public-private partnership over four thousand acres, though the transaction remains pending due to unavailable state land, while a separate opportunity of more than three thousand acres in Gaddani is under review through an unsolicited proposal.



4.1 Competitiveness Gap Against Karachi and Sindh

Dimension	Hub/Gaddani Advantage	Gap vs. Karachi/Sindh	Policy Implication
Location	Immediate proximity to Karachi and access to the Makran Coastal Highway.	Karachi retains mature ports, suppliers and container ecosystems.	Faster approvals and lower serviced-land cost must compensate for distance from the core market.
Land	Potentially large industrial parcels with lower congestion.	Title, state land availability and estate servicing move slowly.	Build a land bank and resolve Hub SEZ land as the first priority.
Utilities	An existing industrial base and power assets in Lasbela.	Water and electricity remain binding for further expansion.	Develop a dedicated industrial utility vehicle with service-level agreements.
Regulation & taxes	Provincial ability to streamline local approvals and PPPs.	Investors compare local taxes and inspections unfavorably with Sindh.	Pursue federal-provincial fiscal harmonization and one-window facilitation.

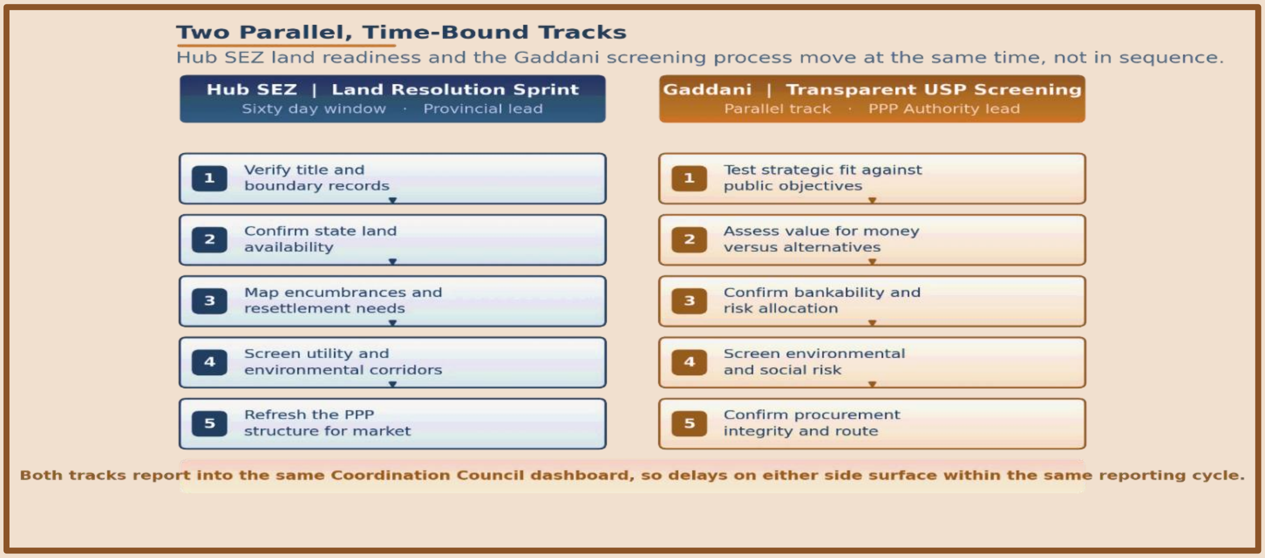
Dimension	Hub/Gaddani Advantage	Gap vs. Karachi/Sindh	Policy Implication
Environmental compliance	Opportunity to design greenfield common facilities.	Gaddani's ship-breaking base faces safety and hazardous-waste concerns.	Build common effluent, fire and safety upgrades directly into the PPP.
Cluster depth	Potential clusters in plastics, engineering, marble and logistics.	Supplier networks remain thinner than in Karachi.	Anchor tenants and targeted cluster incentives are necessary.

The Hub SEZ transaction should not reach the market before its land is legally and physically bankable, which is why a sixty-day sprint is set aside to verify title, state land availability, encumbrances, and utility corridors before the PPP structure is refreshed. The Gaddani proposal, by contrast, is handled as a transparent screening exercise: it is tested against strategic fit, value for money, bankability, environmental and social risk, and procurement integrity before a competitive challenge or equivalent route is confirmed.

4.2 Cluster-Based Industrial Expansion

Rather than trying to replicate Karachi outright, Hub and Gaddani are better positioned as an overflow belt built around five clusters that match the corridor's existing strengths. Plastics, packaging and light engineering can grow around Hub itself, close to Karachi's suppliers, provided ten anchor firms are identified early and offered plug-and-play plots with time-bound approvals. Mineral processing and construction materials, linked to barite, marble, limestone and the Chagai corridor's cargo, can be organised around shared crushing, grinding, testing and weighbridge facilities. Ship recycling and maritime fabrication build directly on Gaddani's existing skills base, provided safety, hazardous waste handling and worker training are modernized alongside it. Cold chain, fisheries and food logistics can be piloted as a dedicated PPP zone on Gaddani land, supported by cold storage and HACCP certification. Logistics, warehousing and trucking complete the picture, with a dedicated sub-zone allocated inside the Hub SEZ master plan to serve as the bridge between Karachi, the rest of Balochistan and Gwadar.

4.3 Land Readiness and Screening:



Turning the Hub SEZ transaction into something a bank could actually finance starts with a sixty-day sprint that treats land as the single gating issue rather than as paperwork to be cleared later. The Revenue Department and LIEDA begin by verifying title and boundary records against the site's cadastral map, since any mismatch here would unravel every later step. Once the boundaries are settled, the Board of Revenue confirms whether the state land needed for the project is genuinely available, and if it is not, the province must decide on an alternate parcel rather than let the transaction stall indefinitely. From there, district administration and the PPP Authority map encumbrances and any resettlement obligations, followed by an environmental and utility corridor screening carried out jointly by the Environment, Energy, and Public Health Engineering departments. Only after these five checks are complete does the PPP Authority refresh the transaction structure, at which point Hub SEZ is finally ready to go back to market with a scope and risk allocation that investors can actually price.

The Gaddani proposal follows a different logic, because the land is already available and the task is not to secure it but to test the proposal that has been submitted against it. The Balochistan PPP Authority begins by checking whether the project genuinely serves the province's stated objectives, namely diversification, safe ship recycling, and coastal job creation, before asking whether private delivery would outperform a conventional public estate development in terms of value for money. Bankability is then assessed by examining whether lenders could realistically finance the project under the risk allocation on offer, followed by a review of environmental and social risk given the ship breaking industry's history of hazardous waste and safety concerns. The screening closes with a procurement integrity check to confirm the route complies with provincial PPP law, after which the province can move to a competitive challenge or an equivalent transparent procurement mechanism with confidence that the process will hold up to scrutiny.

The Gaddani proposal also carries a land use dimension that the screening process alone does not capture. Because the site brings together several potential uses at once, the 3,000 plus acres will need to be subdivided into functional zones so that ship recycling modernisation, logistics, industrial plots, coastal tourism and fisheries, and mineral processing do not end up competing for the same ground. Coastal buffers and community access should be reserved from the outset, rather than negotiated after tenants are already in place.

4.4 Transaction Recommendations: Hub SEZ Versus Gaddani

Transaction Issue	Hub SEZ PPP Response	Gaddani USP Response
Land	State-land task force, completed title and transfer route, frozen boundaries, notified industrial zoning	Verify the 3,000 plus acres, map environmental and coastal restrictions, reserve corridors for utilities and roads
PPP Route	Reconfirm approval once land is ready, procure a developer through competitive PPP with phased obligations	Screen the proposal, publish a project brief, run a competitive challenge or equivalent transparent procurement
Utilities	Developer obligations for internal infrastructure, government obligations for external power, water and roads	Consider a separate common infrastructure vehicle, including hazardous waste and firefighting systems
Fiscal Incentives	Align with federal SEZ incentives and provincial service tax, property and fee policy	Clarify whether the project is an SEZ, an industrial estate, a maritime zone or a mixed-use PPP
Governance	One project team spanning LIEDA, Industries, the PPP Authority and BBOIT	PPP Authority working with Industries, LIEDA, Environment, Fisheries and district administration

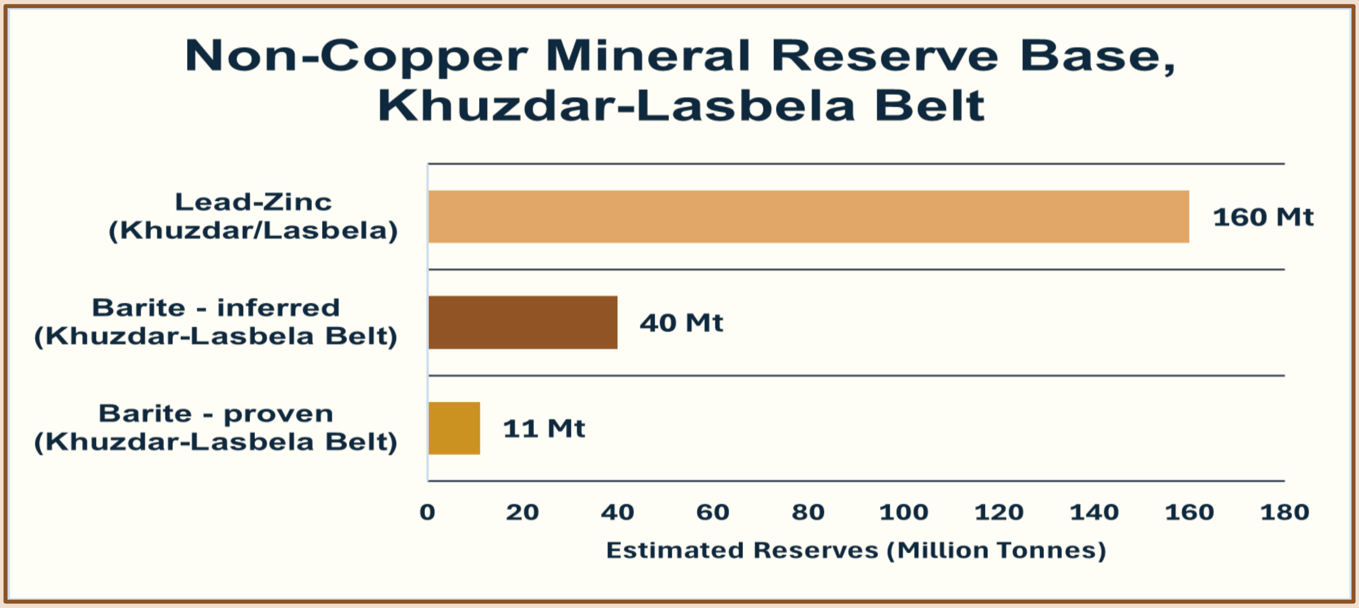
05 Value Addition in the Mining Sector

Balochistan's mineral economy is broad but still weighted toward extraction rather than processing. Around fifty minerals have been discovered across the province, of which thirty-nine are commercially exploited under roughly 1,610 licenses [7], with Balochistan leading national production of coal, copper, lead-zinc, barite and chromite. Barite deposits are concentrated at Bankhri, Kudni, Hunurki, Duddar, Gunga and Koh-e-Sultan, and Bolan Mining Enterprise already operates a grinding and milling plant producing drilling-grade material from this belt. The scale of this opportunity becomes clearer when set against the province's own targets and reserve estimates. The mining sector's revenue is targeted to rise from roughly 2.79 billion rupees to 5 billion rupees a year, a goal expected to create around 7,400 new jobs across the value chain [1]. Much of that growth is expected to come from minerals that are already well understood but not yet processed at scale. The Khuzdar Lasbela barite belt alone is estimated to hold about 11 million tons of proven reserves and a further 40 million tons of inferred reserves [1], a resource base large enough to support a genuine expansion of grinding and export capacity rather than the incremental growth the sector has seen so far. Read together with the lead zinc reserves already noted in Duddar and Gunga, these figures suggest that Balochistan's non copper minerals are, on their own, substantial enough to justify dedicated processing infrastructure well before any copper gold refining becomes commercially viable.

5.9 Bt	**37 yrs**	**90 Mtpa**	**~600,000 t**
Chagai Arc resource (0.41% Cu, 0.22 g/t Au)	Reko Diq minimum open-pit mine life	Combined ore processing capacity	Projected annual copper concentrate output

Reko Diq, the most significant near-term anchor for the province's mining value chain.

The most significant near-term anchor is Reko Diq, described as one of the largest undeveloped copper-gold projects in the world, expected to run for at least thirty-seven years as an open-pit operation with a combined processing capacity of ninety million tonnes annually [8]. Ownership of the project is split between Barrick, which holds fifty percent, three federal state-owned enterprises, which together hold twenty-five percent, and the Government of Balochistan, which holds the remaining twenty-five percent through a fifteen percent fully funded share and a ten percent free-carried share. Earlier feasibility work envisaged annual production of around 600,000 tonnes of copper concentrate, containing between 28 and 31 percent copper and between 7 and 22 grams per tonne of gold. These figures should be treated as indicative rather than final, since they are expected to be updated against current project designs. The Chagai Arc alone is estimated to hold close to 5.9 billion tons of ore at 0.41 percent copper and 0.22 grams per tonne of gold [1].

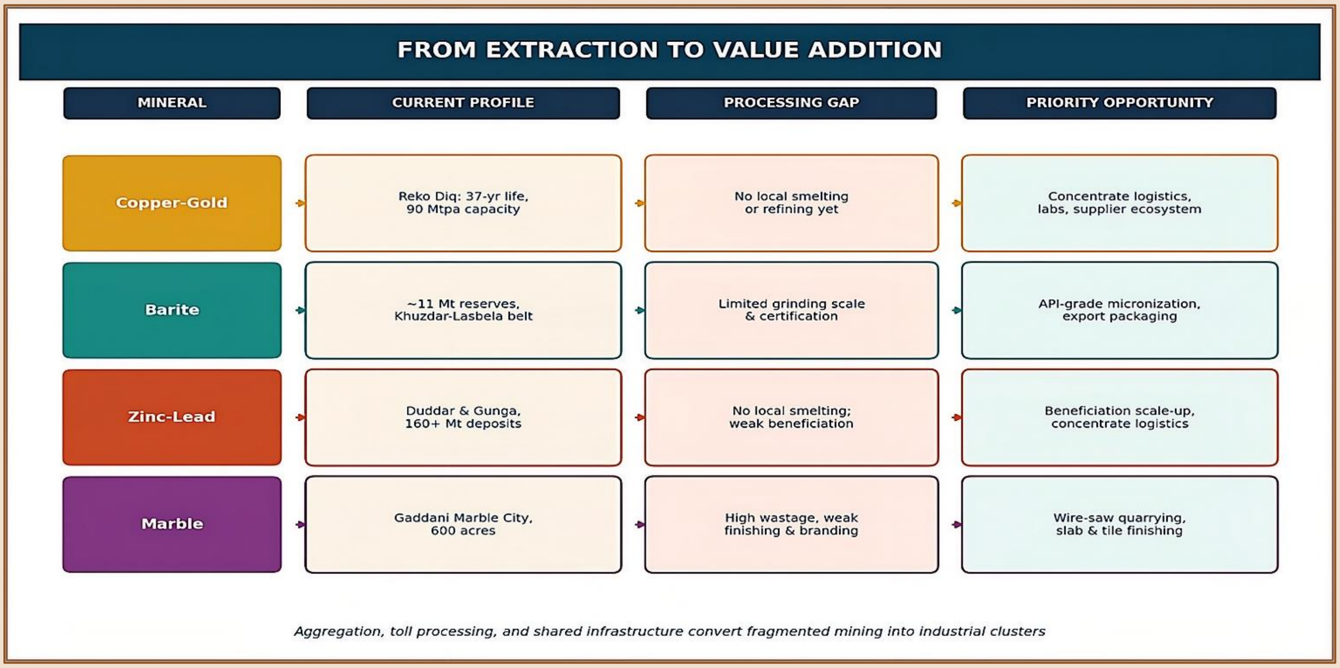


5.1 Extended Mineral Value Chain Assessment

Mineral	Current Profile	Gap to Value Addition	Priority Opportunity
Copper-gold	Large-scale concentrate production planned at Reko Diq; historical blister copper at Saindak.	Smelting and refining require scale, power and water not yet secured.	Local procurement, concentrate handling, assay labs and camp services in the near term.
Barite	Existing deposits and grinding for oil-drilling grade in Khuzdar-Lasbela.	Limited scale, certification, and export marketing.	Expand API-grade grinding, micronisation, and bulk export logistics.

Mineral	Current Profile	Gap to Value Addition	Priority Opportunity
Zinc-lead	Duddar and Gunga deposits exceed 160 million tons with a concentrate production history.	Beneficiation scale and local smelting remain undeveloped.	Scale up beneficiation and concentrate logistics, with medium-term feasibility for downstream inputs.
Chromite / ferrochrome	Chromite resources linked to the Bostan and Muslim Bagh potential.	Ferrochrome needs stable power that small miners cannot secure alone.	Toll processing, aggregation, and ferrochrome feasibility within an energy-secure zone.
Rare earth & strategic minerals	Potential exists but remains a geological prospect rather than a proven base.	Geological data, metallurgical testing and regulatory clarity are all insufficient.	A federal-provincial exploration programme, without downstream promises before validation.
Marble & construction minerals	Marble City Gaddani and ordinary marble production are already established.	High wastage and limited finishing or branding.	Modern quarrying, slab processing, and export-ready branding near Hub-Gaddani.

Downstream processing has lagged for reasons that recur across every mineral: refining and beneficiation need dependable power, water, transport and waste management bundled as one investable package; licensing has rarely been tied to local processing commitments; geological data remains incomplete; and many operators are too fragmented to support a dedicated plant without aggregation or toll processing. Addressing these gaps in sequence, rather than promising smelting and refining before the underlying economics are validated, is central to the programme's credibility. Policy uncertainty compounds these gaps further, since overlapping federal and provincial roles on strategic minerals, foreign investment, security, environmental approval and export rules make project finance harder to secure than it should be. Environmental and social risk sits alongside it, because processing without credible tailings, waste, water and community safeguards will struggle to attract financing regardless of how strong the underlying economics look.



5.2 Priority Value-Addition Opportunities

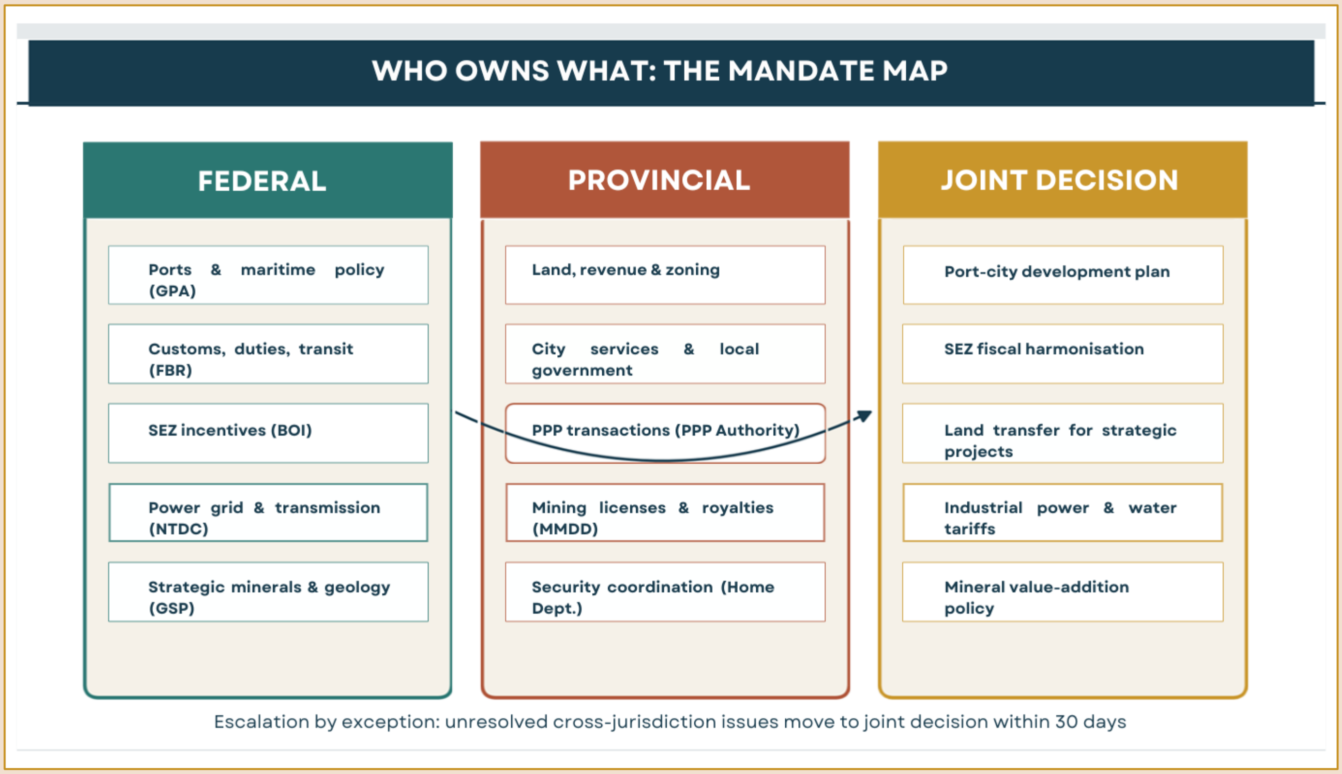
Six opportunities deserve priority treatment ahead of the rest. Around Reko Diq, a local supplier and logistics ecosystem can be built covering concentrate handling, port logistics, rail and road support, fuel, explosives, maintenance, fabrication, camp services, catering, water systems and training. In Khuzdar, Lasbela and Hub, barite value can be added through expanded API-grade grinding, micronisation, testing and export logistics. Zinc-lead beneficiation and concentrate handling can be strengthened around Duddar and Gunga, alongside medium-term feasibility work on downstream products. Shared mineral processing parks, offering common crushing, grinding, flotation testing, sampling labs, weighbridges, warehousing and customs facilitation, should be established at Hub, Gaddani, Khuzdar and Muslim Bagh. Marble and dimensional stone production can be modernized through better quarrying, slab processing and export branding near Hub-Gaddani. Finally, a federal-provincial strategic minerals exploration platform should validate rare earth and other critical mineral potential before any downstream promises are made.

5.3 Joint Roadmap: Federal, Provincial and Joint Roles

Action	Federal Role	Provincial Role	Joint Mechanism
Digital geological and licensing data room	GSP support, standards, strategic minerals coordination	MMDD and BMEC digitize licenses, maps, production and royalties	A Mineral Data Room Steering Committee with investor access protocols
Mineral value addition policy	Align export, customs, tax and minerals policy with BOI and FBR	Revise concessions and leases to encourage local processing	A federal-provincial policy note approved by both cabinets
Reko Diq economic linkages	Federal SOEs coordinate infrastructure, financing, port, rail and road	GoB ensures local employment, land, water and service coordination	A Reko Diq Linkages Task Force under joint chairmanship
Processing parks	BOI and SEZ incentives, federal infrastructure financing	Land, utilities, PPP procurement, environmental approvals	A project preparation facility to develop pre-feasibilities
Skills and safety	NAVTTC and HEC certification partnerships	BTEVTA, mining institutes, labour and mines inspectorate	An industry-funded training compact with mine operators
Environmental governance	National standards and lender requirement support	BEPA and MMDD enforce EIAs, tailings, waste and water rules	A shared environmental monitoring dashboard for strategic projects

06 Joint Federal-Provincial Delivery Architecture

No single institution currently owns the combined outcome of investment, infrastructure, service delivery and regulation across the three workstreams, which is why a conventional committee structure is judged insufficient. The proposed architecture is instead cabinet-notified, time-bound and data-driven, built around a Balochistan Economic Coordination Council co-chaired by the Prime Minister or a nominee and the Chief Minister of Balochistan, operating for twenty-four months and supported by three empowered delivery cells. Federal membership on the Council is expected to draw from the ministries of Planning, Finance, Maritime Affairs, Commerce, Energy, Communications, Aviation, and Industries together with BOI and FBR and Customs, while provincial membership draws from Planning and Development, Finance, Industries, Mines and Minerals, Energy, Revenue, Home, Local Government, Environment, BBOIT, the PPP Authority, GDA and LIEDA. The Council is expected to meet quarterly, and its functions cover approving milestones, resolving policy conflicts, securing budget commitments from both tiers, reviewing security and social license issues, and publishing a decision tracker after each meeting. Its secretariat sits jointly inside GoB's Planning and Development Department and the federal Ministry of Planning, supported by a technical unit staffed with transaction, infrastructure, legal, mining and logistics specialists who prepare the material each quarterly meeting works from.



Decision rights split between federal and provincial tiers, with a defined joint interface for cross-cutting issues.

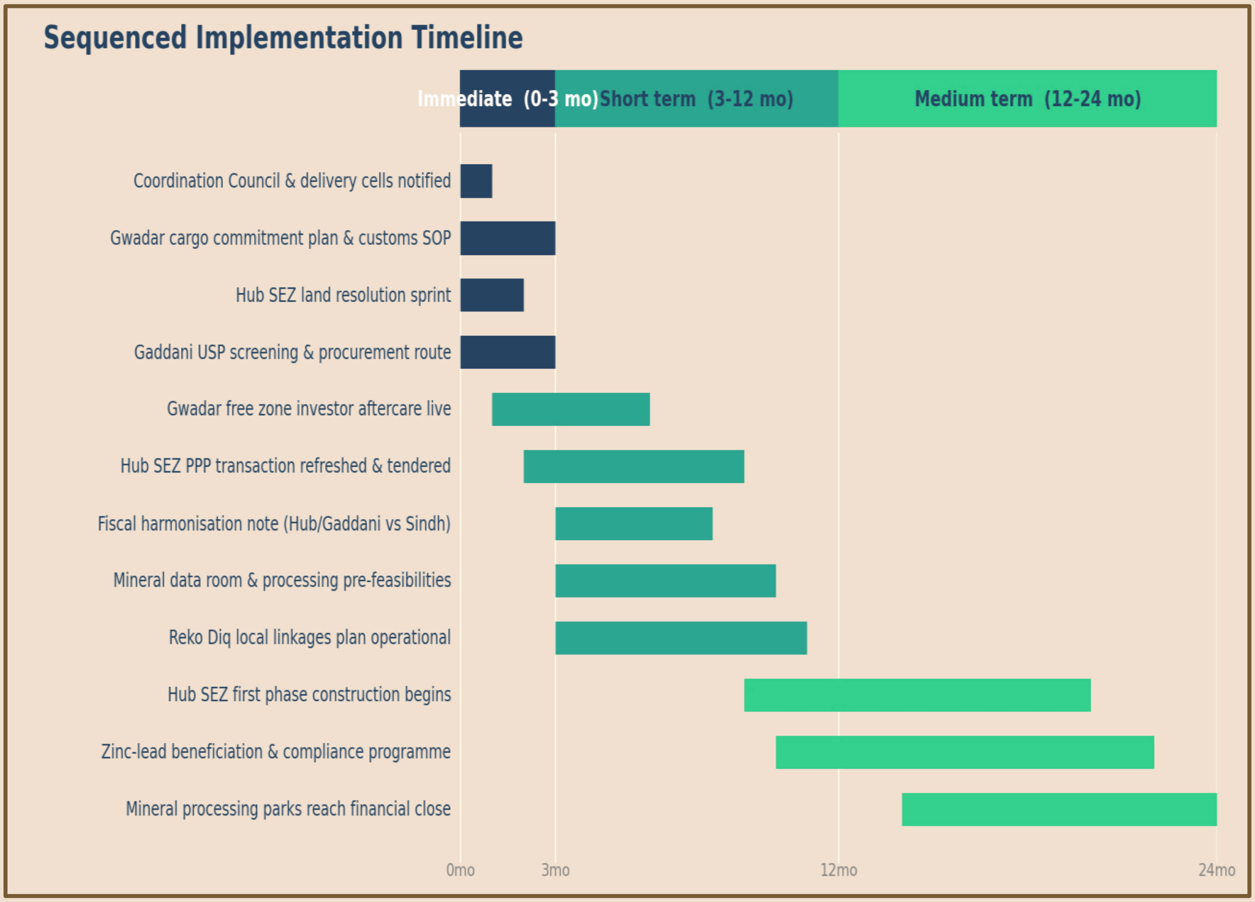
6.1 Delivery Cells and Their Mandates

Delivery Cell	Mandate	Core Outputs in 180 Days
Gwadar Port-City Cell	Integrate port cargo, free zone operations, utilities, city services, security and investor aftercare.	Cargo commitment plan; free zone investor dashboard; utilities risk register; customs SOP; city service plan.
Hub-Gaddani Industrial Cell	Resolve Hub SEZ land, structure the PPP, process the Gaddani USP, and prepare infrastructure packages.	Hub land due diligence; PPP transaction plan; Gaddani USP screening report; utility master plan.
Mineral Value Addition Cell	Prepare a mineral processing pipeline, link Reko Diq to the local economy, and digitize licensing data.	Mineral value chain pipeline; Reko Diq linkages plan; geological data room concept; skills compact.

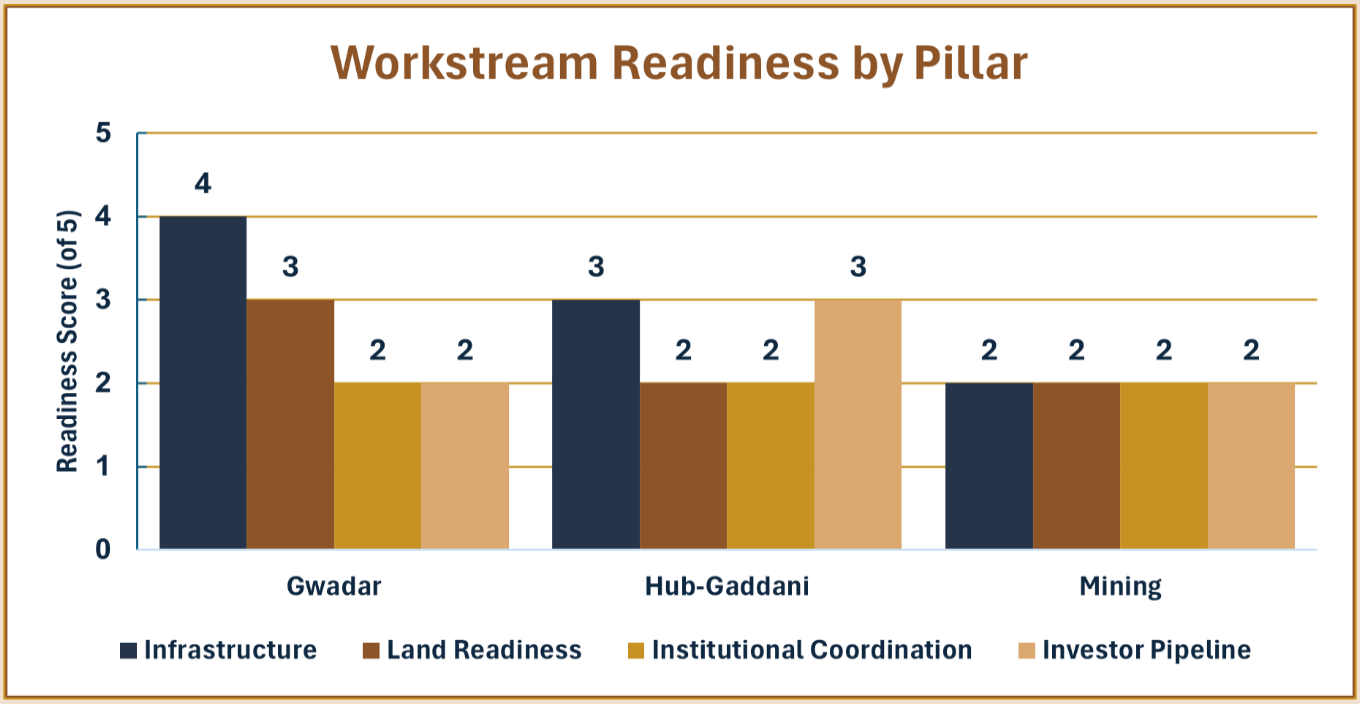
Six coordination principles anchor the architecture in practice: every action carries one accountable owner rather than a list of participants; unresolved issues older than thirty days escalate to the council co-chairs with a written decision note; land and utilities must be secured before any investment roadshow proceeds; fiscal incentives are tied to performance rather than granted unconditionally; community inclusion is treated as project risk management rather than a downstream concern; and each delivery cell reports progress on a monthly dashboard.

07 Joint Action Matrix

The action matrix is the operational spine of the framework. Every recommended action carries a named lead entity, the agencies expected to support it, a defined timeline, expressed as immediate for zero to three months, short term for three to twelve months, and medium term for twelve to twenty-four months, and the impact it is expected to unlock. The matrix below reflects the current state of the framework, drawn directly from the source action plan., since it is the reference table each delivery cell reports against every month.



Sequenced implementation timeline drawn directly from the action matrix.



Illustrative readiness score by pillar, showing where each workstream still needs the most coordinated push.

Recommended Action	Lead	Supporting Entities	Timeline	Expected Impact	Coordination requirements
Establish Coordination Council & 3 delivery cells	Joint	PM Office/ Planning; CM Secretariat/ P&DD	Immediate	Single decision platform	Cabinet notification; TORs; monthly dashboard
Gwadar cargo commitment plan (wheat, fertilizer, transit)	Federal	Maritime Affairs, GPA, FBR/ Customs, GoB	Immediate	Raises port utilization	Cargo routing analysis; tariff and customs SOP
Gwadar Free Zone investor aftercare programme	Federal/ Joint	GPA, COPHC, BOI, BBOIT, Customs, GDA	Immediate	Converts registrations into operating units	Investor list, status of plots/utilities, approval tracker

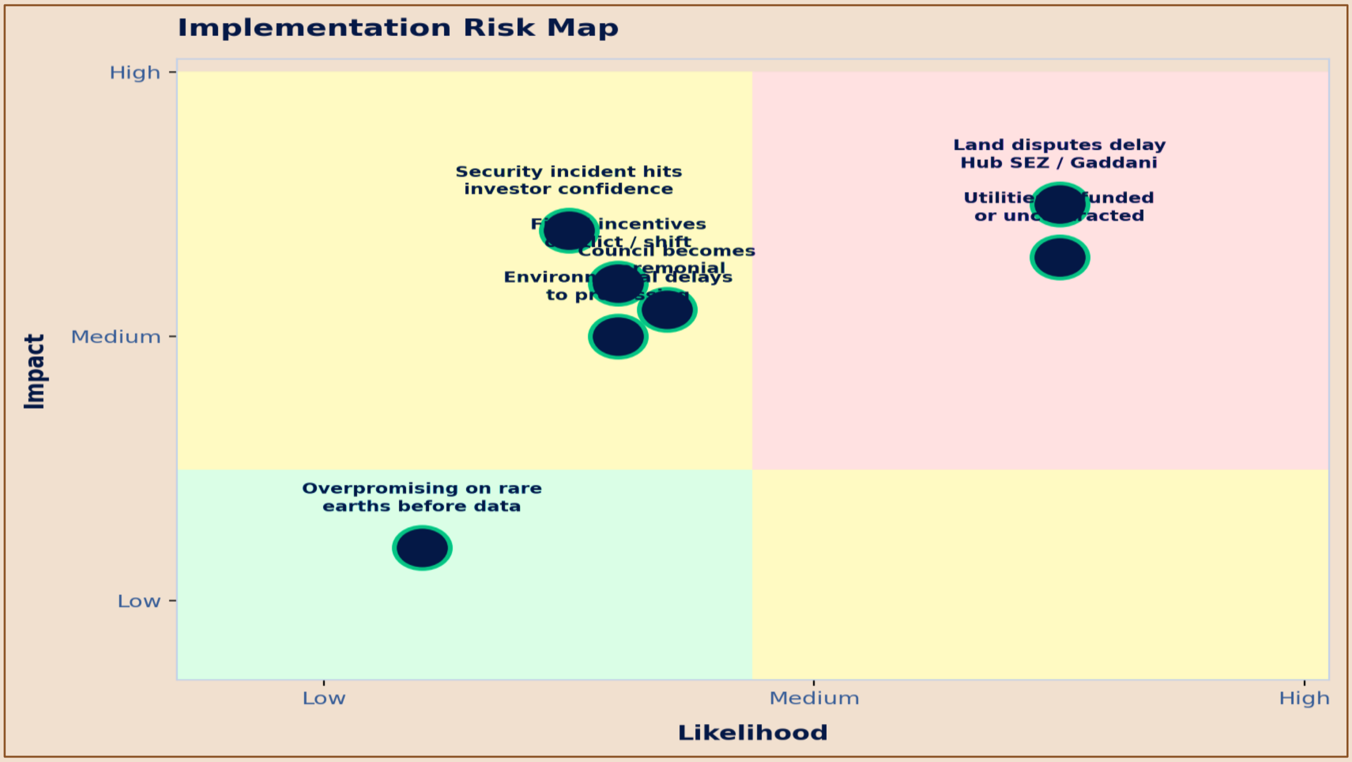
Recommended Action	Lead	Supporting Entities	Timeline	Expected Impact	Coordination requirements
Gwadar city utilities war-room	Provincial	GDA, PHED, QESCO/ NTDC, GPA	Immediate	Improves investor and local confidence	Weekly service dashboard; escalation to cell
Gwadar security & community inclusion protocol	Joint	Home Dept., federal security agencies, GPA	Short term	Reduces risk premium and social friction	Local hiring targets; grievance redress; community communication
Hub SEZ 4,000-acre land resolution sprint	Provincial	Revenue, Industries, LIEDA, PPP Authority	Immediate	Unlocks the already-approved PPP transaction	Title, encumbrance, map, transfer route, notification
Refresh Hub SEZ PPP structure after land readiness	Provincial	PPP Authority, LIEDA, Industries, Finance	Short term	Enables bankable procurement and phased development	Feasibility, risk matrix, concession model, VGF if needed
Fiscal harmonization notes for Hub/Gaddani investors.	Joint	FBR, BOI, GoB Finance, Industries	Short term	Reduces cost disadvantage versus Karachi/ Sindh	Tax/service fee comparison; proposed alignment
Gaddani 3,000+ acre USP screening & competitive process	Provincial	PPP Authority, Industries, LIEDA, Environment	Immediate /Short	Transparent transaction; avoids procurement risk	USP evaluation; value-for-money; competitive challenge
Gaddani ship recycling modernization plan	Provincial /Joint	Labor, Environment, Industries, Maritime	Short term	Higher safety, compliance and diversification	Hazardous waste, fire, health, worker training, environmental plan

Recommended Action	Lead	Supporting Entities	Timeline	Expected Impact	Coordination requirements
Industrial utility master plan for Hub-Gaddani	Provincial /Joint	Energy, QESCO/ NTDC, PHED, PPP Authority	Short term	Converts serviced plots into investable assets	Power, water, wastewater, solid waste, roads, CAPEX/OPEX model
Mineral Data Room and digital cadastre roadmap	Provincial	MMDD, BMEC, GSP, IT Department	Short term	Improves transparency and investor confidence	Data inventory, licensing maps, confidentiality and access rules
Reko Diq local economic linkages plan	Joint	Federal SOEs, RDMC, GoB, BBOIT, TEVTA	Short term	Captures supplier, jobs and service spillovers	Procurement categories; local firm development; training targets
Barite value-addition package (Khuzdar-Lasbela-Hub)	Provincial	MMDD, BME/PPL, private investors, BOI	Short term	Higher-value exports and import substitution	Plant expansion pre-feasibility; quality lab; logistics plan
Zinc-lead beneficiation & environmental compliance	Provincial /Joint	MMDD, Duddar/Gunga operators, BEPA, BOI	Medium	Sustains processing while reducing environmental risk	Technical audit; tailings/waste; expansion feasibility
Mineral processing park pre-feasibilities	Joint	BOI, MMDD, Industries, LIEDA, PPP Authority	Medium	Creates shared infrastructure for SMEs and miners	Site selection; demand; utilities; PPP/SEZ route
Project-linked skills compact	Joint	NAVTTC, BTEVTA, TEVTA, investors	Short/ medium	Local employability and social license	Curricula, certifications, apprenticeship targets

Recommended Action	Lead	Supporting Entities	Timeline	Expected Impact	Coordination requirements
Monthly investor grievance clinic	Joint	BBOIT, BOI, delivery cells, chambers	Immediate	Improves trust and resolves operational barriers	Issue log; decisions; turnaround standards
Quarterly progress notes to both cabinets	Joint	Council Secretariat	Quarterly	Sustains political ownership and sequencing discipline	Dashboard against action matrix

08 Risks, Monitoring and Decision Points

8.1 Key Risks and Mitigations



Implementation risks plotted by likelihood and impact.

Risk	Likelihood / Impact	Mitigation
Land disputes delay Hub SEZ and Gaddani	**High / High**	Complete title, encumbrance and stakeholder mapping before procurement begins.
Utilities remain unfunded or uncontracted	**High / High**	Require signed utility service agreements before investor marketing starts.
Federal and provincial incentives conflict	**Medium / High**	Adopt a joint fiscal note with sunset and performance conditions.
Security incident disrupts investor confidence	**Medium / High**	Integrate security, local inclusion and emergency response into every project plan.
Environmental compliance delays processing	**Medium / High**	Prepare environmental baselines and shared facilities upfront.
Coordination council becomes ceremonial	**Medium / High**	Assign decision rights, deadlines and dashboards; report quarterly to cabinets.
Overpromising on rare earth refining before data exists	**Medium / Medium**	Use staged exploration and metallurgical validation before industrial promotion.

8.2 Monitoring Indicators

Workstream	90-Day Indicator	12-Month Indicator	24-Month Indicator
Gwadar	Council and cell notified; cargo plan approved.	At least 10 free-zone or warehouse units active or under construction.	Sustained cargo corridors and functioning port-city services.
Hub-Gaddani	Hub land due diligence completed; Gaddani USP screened.	Hub SEZ in procurement; Gaddani competitive process launched.	First-phase serviced plots and anchor tenants committed.
Mining	Mineral data room roadmap; Reko Diq task force launched.	Processing Park pre-feasibilities completed; skills compact active.	At least one mineral processing PPP reaches financial close.
Governance	Dashboard format approved; first report issued.	Quarterly cabinet progress notes underway.	Delivery cells embedded in routine budget and planning cycles.

09

Final Decision Package

Taken together, the evidence points to one conclusion: Balochistan's constraint is coordination, not endowment. The following package is put forward for joint approval by the federal and provincial governments as the minimum set of decisions needed to move from analysis to implementation.

- Approve the Balochistan Economic Coordination Council and its three delivery cells for Gwadar, Hub-Gaddani, and mining value addition.
- Authorize a sixty-day land and transaction sprint for the Hub SEZ PPP and a parallel screening process for the Gaddani USP.
- Approve the 180-day Gwadar Revival Package covering cargo, customs, free zone operations, and city utilities.
- Approve preparation of the mineral processing and Reko Diq linkages pipeline, including the data room and processing park pre-feasibilities.
- Mandate a monthly implementation dashboard and quarterly reporting to both cabinets.

TWO-YEAR OUTLOOK

From Dormant Assets to a Central Economic Anchor

If adopted on this timeline, the framework is expected to convert Balochistan's dormant strategic assets into consistent cargo volumes, operating industrial plots, and at least one mineral processing investment reaching financial close within two years, positioning the province as one of Pakistan's central economic anchors rather than a resource base awaiting future development.

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Annex A — Targeted Consultation Guide:

Stakeholder group	Priority questions
Federal maritime, customs and logistics agencies	Which cargoes can be routed through Gwadar within twelve months? What customs, tariff and trucking constraints need a federal decision?
GoB P&DD, Industries, PPP Authority, LIEDA, Revenue	What exact legal and physical steps make Hub SEZ land available? What is the status and procurement route for the Gaddani USP?
GPA, GDA, district administration	Which city service failures affect investors and residents most directly?
Mining operators and MMDD	Which minerals already have enough scale to justify processing?
Private investors and chambers	What would make Hub and Gaddani genuinely competitive with Karachi and Sindh?
Communities, labour and training institutions	What local jobs and safety issues need addressing for social license?

Annex B — Detailed Workstream Implementation Notes (summary)

B1. Gwadar 180-Day Revival Package — converts existing infrastructure into recurring cargo, free zone activity and city services within six months, federally led on cargo/customs, provincially led on city services and security.

B2. Hub SEZ Land and PPP Critical Path — ten steps: task force → boundary/title verification → state land decision → encumbrance screening → environmental/utility screening → PPP feasibility refresh → SEZ/incentive alignment → market sounding → competitive procurement → financial close.

Step	Action	Lead	Documentation required	Decision/output
1	Constitute Hub Land Resolution Task Force	GoB P&DD/Revenue	Notification, TORs, member agencies	Single team owns land readiness.

Step	Action	Lead	Documentation required	Decision/output
2	Boundary and title verification	Revenue/LIEDA	Cadastral map, title record, satellite overlay	Final site map and area statement.
3	State land availability decision	Board of Revenue/GoB Cabinet	State land inventory, transfer route, legal note	Cabinet approval or alternate land decision.
4	Encumbrance and social screening	District administration/PPP Authority	Occupancy, claims, community use, resettlement requirements	Risk register and mitigation plan.
5	Environmental and utility corridor screening	Environment/Energy/PHED/ C&W	EIA screening, water source, power connection, roads, drainage	Feasible first-phase layout.
6	PPP feasibility refresh	PPP Authority/LIEDA	Demand study, CAPEX/OPEX, risk allocation, tariff/plot model	Updated project structure and procurement route.
7	Federal SEZ/incentive alignment	BOI/GoB Industries	SEZ compliance, incentive note, customs/tax treatment	SEZ/fiscal pathway for investors.
8	Market sounding	PPP Authority/BBOIT/BOI	Information memorandum, investor feedback	Bankable tender design.
9	Competitive procurement	PPP Authority	RFQ/RFP/concession, evaluation criteria	Developer selection.
10	Financial close and first phase launch	Developer/GoB	Concession, financing, land handover, CPs	Serviced land construction begins.

B3. Gaddani USP and Diversification Critical Path — screened against strategic fit, value for money, bankability, environmental/social risk, procurement integrity and intergovernmental alignment before a competitive challenge is confirmed.

USP screening criterion	Key test	Evidence required	Possible decision
Strategic fit	Does the proposal support diversification, jobs, safe industrialization	Concept plan, land use plan, demand study.	Proceed, modify, or reject.

USP screening criterion	Key test	Evidence required	Possible decision
	and coastal management?		
Value for money	Does private delivery outperform public delivery or conventional estate development?	CAPEX/OPEX, risk transfer, revenue model, fiscal exposure.	Competitive challenge or alternate PPP model.
Bankability	Can lenders and investors finance the project under proposed risk allocation?	Revenue sources, land tenure, permits, guarantees, tariff model.	Revise risk allocation before tender.
Environmental and social risk	Are ship recycling, hazardous waste, coastal ecology and community issues manageable?	EIA scoping, baseline, worker safety, waste plan.	Proceed with conditions or redesign.
Procurement integrity	Does the route comply with provincial PPP law and rules?	USP evaluation record, approvals, competitive challenge rules.	Formal procurement decision.
Intergovernmental alignment	Does it need SEZ, customs, maritime or federal road/power support?	Federal approval map, utility plan.	Joint support package.

Annex C — Proposed Institutional Mandate Map

Sets out federal vs. provincial vs. joint roles across port operations, customs, SEZ incentives, land/zoning, power, water, mining regulation, PPP transactions, security and skills — each with a named joint decision interface.

Policy area	Federal mandate/role	Provincial mandate/role	Joint decision interface
Port operations and maritime policy	Ministry of Maritime Affairs, GPA, port concessions, port infrastructure, maritime regulations.	District/city facilitation, local services, land around port-city interface, local security coordination.	Port-city development plan, cargo facilitation, local community impact management.

Policy area	Federal mandate/role	Provincial mandate/role	Joint decision interface
Customs, duties and transit	FBR/Customs, Afghan transit, bonded warehousing, scanning, tariff procedures.	Local facilitation, investor aftercare, provincial service taxes and local permits.	Investor operating protocol for free zones and industrial estates.
SEZ incentives	BOI, federal SEZ Act, income tax/customs incentives and approvals.	Provincial SEZ authority functions, land, estate management, service tax, local approvals.	Fiscal harmonization and SEZ notification/compliance.
Land and zoning	Federal land where applicable, NHA/rail/airport corridors and federal installations.	Board of Revenue, district administration, provincial land allocation, zoning and conversion.	Land transfer for strategic projects; resettlement/community protocols.
Power and transmission	Ministry of Energy, NTDC, NEPRA framework, national grid and import arrangements.	Provincial energy department, local distribution coordination, captive/renewable facilitation.	Dedicated industrial feeders, tariffs, grid connections, embedded generation approvals.
Water	Federal financing for major projects where approved; national climate/water programmes.	PHED, Irrigation, local government, industrial water allocations and local reservoirs/desalination.	Cost sharing and operating model for industrial and municipal water.
Mining regulation	Strategic minerals coordination, geological survey, federal SOE stakes, foreign investment facilitation.	MMDD licensing, royalties, provincial minerals policy, land, environment and community development.	Value addition policy, data room, Reko Diq linkages, strategic mineral projects.
PPP transactions	Federal PPP support only where federal assets/funding involved.	Balochistan PPP Authority, PPP Board, line departments, project preparation and procurement.	Viability gap, guarantees, federal infrastructure commitments.
Security	Federal security agencies for national threats and CPEC-related security where applicable.	Home Department, Levies/police, district administration and local coordination.	Security plans tied to community engagement and investor facilitation.

Policy area	Federal mandate/role	Provincial mandate/role	Joint decision interface
Skills	NAVTTC, HEC, national certification and technical partnerships.	BTEVTA, local institutes, provincial labor and training programmes.	Project-linked training compacts and local employment monitoring.

Annex D — Consultation and Data Room Plan

A six-week schedule: week 1 data request launch; weeks 1–3 Gwadar and Hub/Gaddani consultations; weeks 3–5 private sector and mining consultations; week 5–6 validation workshop and cabinet decision note preparation.

Week	Consultation/data activity	Output
1	Launch data request to federal and provincial agencies: cargo, free zone investors, utilities, land records, PPP approvals, mining licenses and production data.	Data room index and missing-data log.
1-2	Gwadar federal agency consultations: Maritime Affairs, GPA, COPHC, Customs, BOI, NHA, Aviation, security agencies.	Gwadar bottleneck note and cargo facilitation SOP draft.
2-3	Gwadar local consultations: GDA, district administration, local government, fisheries, community representatives, chambers.	City services and community inclusion plan.
2-3	Hub/Gaddani consultations: LIEDA, Industries, PPP Authority, Board of Revenue, district administration, Environment, investors.	Hub land sprint report and Gaddani USP screening TOR.
3-4	Private sector consultations in Karachi/Hub: logistics operators, manufacturers, ship recyclers, banks, developers.	Competitiveness gap note and investor demand map.

Week	Consultation/data activity	Output
4-5	Mining consultations: MMDD, BMEC, GSP, Reko Diq/RDMC, Duddar/BME/PPL, small miners, laboratories.	Mineral value chain pipeline and data gaps.
5-6	Validation workshop with federal/provincial leadership and delivery cells.	Revised action matrix, decision package and dashboard baseline.
6	Cabinet/council decision note preparation.	Final approval memo and implementation calendar.

Annex E — Project Preparation Facility Concept

A jointly capitalized facility supporting PPP transaction preparation, infrastructure pre-feasibility, mineral processing studies, regulatory reform support and dashboards — quality-controlled by the Council secretariat.

Facility window	Eligible projects	Typical outputs	Cost recovery option
PPP transaction preparation	Hub SEZ, Gaddani zone, water/desalination, logistics parks, cold chains.	Feasibility, value-for-money, risk matrix, draft concession, RFQ/RFP, market sounding.	Recovered from successful bidder as development fee where allowed.
Infrastructure pre-feasibility	Industrial feeders, water supply, roads, truck terminals, waste facilities.	Demand, engineering options, cost estimates, funding plan.	Budget or donor funded.
Mineral processing studies	Barite, zinc-lead, marble, chromite, mineral parks.	Resource aggregation, metallurgical tests, market study, site analysis, utilities plan.	Shared with investors under data-room rules.
Regulatory reform support	SEZ/fiscal harmonization, customs SOP, environmental rules.	Policy notes, legal amendments, SOPs, service standards.	Public funding.
Monitoring and dashboards	All action matrix workstreams.	Monthly dashboard, issue log, risk register.	Public funding.

Annex F — Draft Terms of Reference for Delivery Cells

Membership, authority and reporting lines for the Gwadar Port-City Cell, Hub-Gaddani Industrial Cell, and Mineral Value Addition Cell.

Delivery cell	Core membership	Authority	Reporting
Gwadar Port-City Cell	GPA, Maritime Affairs, COPHC, FBR/Customs, BOI, BBOIT, GDA, district administration, QESCO/NTDC, PHED, Home Department.	Resolve operational bottlenecks; prepare cargo and investor plans; recommend federal/provincial decisions; maintain city-services risk register.	Monthly to council secretariat; quarterly to council.
Hub-Gaddani Industrial Cell	Industries, LIEDA, PPP Authority, Revenue, Finance, BBOIT, Energy, PHED, Environment, Labor, district administration, BOI/FBR as needed.	Resolve land and transaction steps; lead PPP preparation; prepare fiscal/regulatory harmonization notes; coordinate utilities.	Monthly to council secretariat; transaction milestones to provincial PPP Board.
Mineral Value Addition Cell	MMDD, BMEC, GSP, BBOIT, Industries, Environment, Finance, BOI, federal SOEs, major operators, TEVTA/NAVTTC.	Develop mineral value-addition pipeline; recommend policy changes; coordinate data room; prepare processing park concepts and Reko Diq linkages.	Monthly to council secretariat; quarterly to council.

Annex G — Draft Federal-Provincial Decision Note

Six proposed decisions (Council approval, delivery cells, Hub SEZ land sprint, Gaddani USP screening, Gwadar Revival Package, mineral pipeline) each with an approving forum and deadline.

Decision area	Approving forum	Immediate instruction	Deadline	Lead drafter
Coordination Council and delivery cells	Federal/provincial leadership	Prepare notification, membership and TORs.	15 days	Federal Planning + GoB P&DD
Hub SEZ land sprint	Provincial Cabinet / CM Office	Mandate Revenue, LIEDA, Industries, PPP Authority and district administration to conclude land readiness report.	60 days	GoB P&DD + Board of Revenue
Gaddani USP screening	PPP Board / Provincial Cabinet	Complete USP screening and procurement-route recommendation.	60-90 days	Balochistan PPP Authority
Gwadar Revival Package	Federal/provincial leadership	Approve cargo, customs, free zone and city service workplan.	30 days	GPA + GDA + Customs
Mineral value addition pipeline	Federal/provincial leadership	Approve data room roadmap and pre-feasibility pipeline.	90 days	MMDD + BOI/BBOIT
Dashboard and reporting	Coordination Council	Publish first implementation dashboard and issue log.	30 days	Council Secretariat

Annex H — Monitoring Dashboard Template

Fields: Action ID, Action title, Lead entity, supporting entities, Status (green/amber/red), Milestone due, Decision required, Risk, Next meeting — with red items escalating after one reporting cycle.

Dashboard field	Definition	Example entry
Action ID	Unique number corresponding to the Joint Action Matrix.	HG-01

Dashboard field	Definition	Example entry
Action title	Concise description of the action.	Hub SEZ 4,000-acre land resolution sprint
Lead entity	Agency responsible for moving the action.	Board of Revenue / GoB P&DD
Supporting entities	Agencies with required inputs.	LIEDA, PPP Authority, Industries, district administration
Current status	Green, amber or red.	Amber
Milestone due	Next milestone and date.	Title and encumbrance report by 30 June
Decision required	The precise decision needed from leadership.	Approve alternate state land if original parcel cannot be transferred
Risk	Implementation risk if decision is delayed.	PPP procurement cannot proceed; investors disengage
Next meeting	Date and forum for escalation.	Hub-Gaddani Cell, first Monday of each month