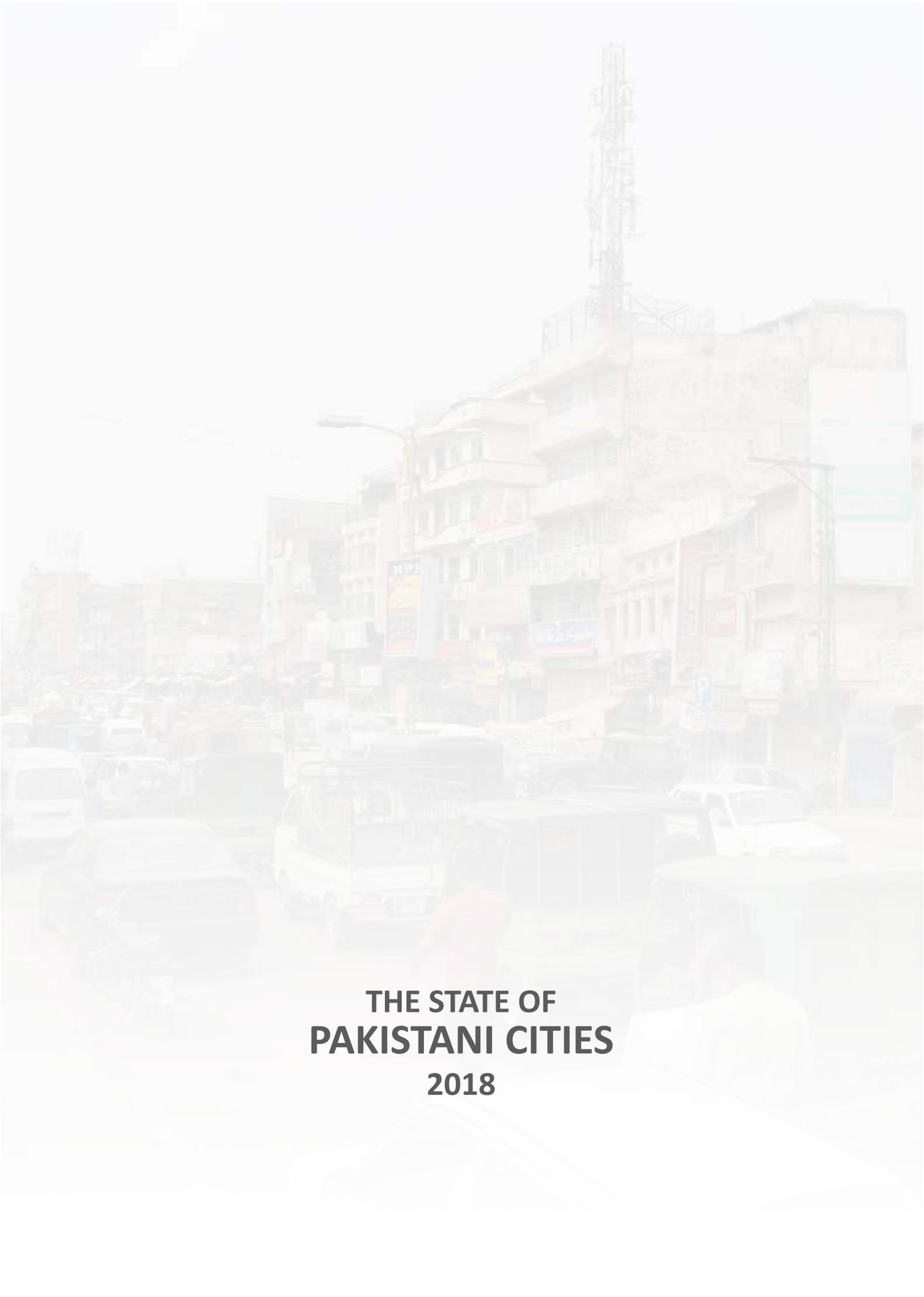


THE STATE OF PAKISTANI CITIES 2018



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**THE STATE OF
PAKISTANI CITIES
2018**



Executive Summary

The State of Pakistani Cities (SPC) report is a pivotal document which identifies the underlying socio-economic drivers contributing to the state of urbanization in the ten largest cities namely Karachi, Lahore, Faisalabad, Rawalpindi, Gujranwala, Peshawar, Multan, Hyderabad, Islamabad and Quetta and their efficacy to respond to the urbanization challenges. The findings of the study reveal that the ten selected cities make up more than half of the total urban population, accounting for 54 percent of the national urban population.

Pakistani cities vary considerably in terms of their size of economy, employment and tax revenues. Services and industry are the major employment sectors in Pakistani cities. The share of the service economy in the cities is larger than the share of services in the national economy. The economies of Provincial Headquarters and the Federal Capital are more service-oriented than other cities. With the rising share of services, direct tax collection has increased, primarily because of the with holding tax regime. Pakistan generates 95 percent of its total federal tax revenue from its ten major cities and Karachi contributes 55 percent, Islamabad 16 percent, and Lahore 15 percent. Much of the tax revenue is associated with large services such as telecommunication, finance and insurance, transport and manufacturing industry, as well as higher per capita income, in cities as compared to the rural areas.

The average urban per capita income in Pakistan is PKR 46,000. Rawalpindi has the highest per capita income of PKR 82,000 while Quetta has the lowest per capita income of PKR 37,000. Islamabad and Peshawar have the second and the third highest per capita income of PKR 70,000 and PKR 67,000 respectively.

Poverty in urban areas is a major and visible phenomenon. Six out of the top ten major cities have double-digit poverty figures: Quetta, with 46 percent, has the highest poverty rate, while Multan, has 35 percent, Peshawar 31 percent, Islamabad, with 3 percent, has the lowest poverty rate. Karachi and Lahore, Pakistan's two most populous cities have 4.5 percent and 4.3 percent poverty rates.

The urban management functions of Pakistani cities are dispersed among several institutions, mostly semi-autonomous bodies, functioning under provincial government departments. The main urban management/administrative bodies responsible for different aspects of city management are municipalities, district administration, development authorities and service delivery institutions etc. The responsibility for urban planning in Pakistani cities rests with city development authorities. public land ownership in urban areas is fragmented and is divided between municipality, development authority, cantonments, industrial estates, provincial government departments. Each agency has its own building, land use and environmental control provisions and is autonomous in carrying out the development works and maintaining the facilities within their jurisdiction.

Urban planning and management remains limited due to the lack of relevant information and



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statistical urban data. One of the key limitations is that little, if any, data is available below the district level, making it almost impossible to analyse or address intra-city disparities and shortcomings. Furthermore, city planning cycles do not take census dates into account and consequently the base data used for urban planning have to be projected or extrapolated making comparisons or measuring progress difficult.

Provision of urban services is the responsibility of government institutions. The major cities have large and increasing numbers of informal settlements, which do not have access to adequate levels of basic services. Despite the introduction of metro buses and the construction of signal-free corridors and other such measures, urban transportation remains a consistent challenge for Pakistani cities. Karachi has a complex traffic network with a large number of private vehicles contributing to major traffic congestions. In Lahore the number of registered vehicles has more than doubled in the last decade. However, Lahore constructed numerous underpasses to ease congestion and prevent the traffic congestions and established a successful Metro Bus System. Mobility in Peshawar is a major challenge. The government has recently taken steps to improve the city transportation, including establishing a sustainable and highly productive Vehicle Emission Testing Department, upgrading the Peshawar Bus Terminal to meet international standards, and maintaining computerized vehicle fitness records. A Bus Rapid Transit (BRT) project for Peshawar sponsored by the Asian Development Bank has recently been launched, which features a 26 km long corridor passing throughout the city.

Urban authorities and other sub-national bodies rely overwhelmingly on provincial or national bodies for funds for delivery of basic urban services. This long held practice of subventions from central authority has largely eliminated all incentive and initiative for the search for local self-reliance and sustainability. Since provincial authorities collect local revenues no efforts are put into strengthening the fiscal and financial capability of local bodies. Access to clean water continues to be a major problem in Pakistani cities. Only 65.2 percent of households in Pakistan's 10 major cities have access to piped water connections. The cities lack sewage treatment facilities and solid waste management which leads to severe environmental pollution and contamination of surface and ground water bodies.

Power supply remains an important sector in national performance in general and urban locations in particular. The previous decade saw an acute power crisis that crippled the national performance especially in the peak summer seasons. The load-shedding of 12-16 hours per day impacts the performance of all sectors. Cities being the principal consumers of power face this challenge to the most acute level. The recent addition of 5000 MW in the national grid has considerably improved the situation but due to inefficient transmission and distribution network the problem remains unresolved.

Pakistan has a well-articulated housing policy, but it remains unimplemented. Housing is not acknowledged as a social policy measure and Local authorities have little control on its provision. Moreover, housing is not seen as an integrative element of cities and indeed, the insistence on



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segregated housing development is actively pursued. Further, increasing urbanization has created pressing demands for housing in cities. The absence of any formal provision for the lower-income urban population and the people migrating from rural areas to urban areas has resulted in the creation of large informal settlements, both in the cities and increasingly, on their periphery.

The general understanding and appreciation of the environment and heritage is low and narrowly defined. Public space in Pakistani cities has been continuously shrinking due to the high commercial value of urban space and urban land. Public space, such as green space, roads, streets, intersections, transport rights-of-way and other corridors are central to liveability, efficiency and equity in the urban areas. It must be adequately provided for but not exclusively expropriated.

Pakistani cities are not inclusive, and certain groups are deliberately and specifically (explicitly or implicitly) excluded from various aspects of city life, provision and access. The exclusion, of the poor, by market forces is perhaps the most visible in terms of housing, land and service provision, while that of women, religious and ethnic minorities and of the physically challenged by social forces is less visible precisely because they are rendered invisible by the workings of social mores and bias. The lack of acceptance of the rights and needs of large sections of the community not only acts as deterrence and an injustice to the excluded, but also deprives cities of the participation and contribution of large sections of the population. Often forced into segregated or secluded existence, these citizens also become easier to target and further isolate and exclude.

Pakistani cities need to better plan and manage their development to meet the needs and demands of their citizens and indeed of the country than they currently doing. To prosper, cities need to be more responsive to the needs of the environment and respective of available resources and to adapt and adopt technologies and economies that are less wasteful and destructive. This means taking a more realistic look at what needs and can be done without compromising our local as well as our global future.

Although the 18th Amendment opened the way to a more-decentralised governance framework, so far this decentralisation has yet to reach the cities. An important condition for implementing the 2030 Agenda and New Urban Agenda will be to incorporate the Sustainable Development Goals (SDGs) into national and sub-national plans.



FOREWORDS

Pakistan is one of the most rapidly urbanizing countries in South Asia. Urbanisation is inherently interconnected with economic development, social development and environmental protection. Managing urbanization well is crucial to the Pakistan's future and will influence the overall social and economic well-being of the country. Accurate and updated data on urban trends and city growth are critical for assessing current and future needs responding to urban growth. It is also a necessity for establishing policy priorities to promote inclusive and equitable urban development. To realize the transformative effect that urbanization can bring about, urban dialogues are an important element.



The State of Pakistani Cities report is a ground-breaking effort to analyse the changes and emerging challenges in the urban sector of Pakistan. Through the development of the report, a solid foundation on city-wide data and information was collected, which will help to formulate city-wide policies for enhanced inclusive urban planning and management, and contribute to an updated knowledge base for the government, private sector and business leaders for increased investment and economic opportunities in the country.

The State of Pakistani Cities report is a knowledge product which presents well-informed and evidence-based information on the state of urbanization across Pakistan. I have no doubt that this report will make an important contribution to our understanding of the current and potential economic role of cities in Pakistan, linking to sustainable national development and brings an action framework for the implementation of the Sustainable Development Goals and New Urban Agenda. I sincerely thank all programme partners and the Government of Pakistan, for supporting the implementation of this programme. In addition, I would like to thank the Government of

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