ISSRA
INSTITUTE FOR STRATEGIC STUDIES, RESEARCH & ANALYSIS

Post Seminar Report

ROAD VS RAIL

RETHINKING PAKISTAN'S TRANSPORT STRATEGY FOR DOMESTIC & REGIONAL CONNECTIVITY

Wednesday, 10 June 2026

NLC

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CONCEPT NOTE

Modern transport systems focus on efficiency, cost-effectiveness, and environmental sustainability, where railways generally offer advantages over road transport, especially for bulk freight and long-term economic benefits. However, in many developing countries, including Pakistan, transport policies are heavily road-focused. This has led to increased logistics costs, environmental challenges, and pressure on infrastructure. Pakistan's railway system remains underutilised due to outdated infrastructure, operational inefficiencies, financial constraints, and weak policy implementation.

This imbal-ance limits the country's ability to achieve sustainable and efficient connectivity.

With this background, a seminar titled **"Road vs Rail: Rethinking Pakistan's Transport Strategy for Domestic & Regional Connectivity"** was held at ISSRA, National Defence University, in collaboration with National Logistics Corporation (NLC) on 10 June 2026. This seminar brought together key stakeholders, including government departments and relevant ministries, researchers and academicians, and representatives from the private sector, to discuss current challenges and explore future transport strategies for Pakistan.

INTRODUCTION

ISSRA, in collaboration with the National Logistics Corporation (NLC), held a seminar titled “Road vs Rail: Rethinking Pakistan's Transport Strategy for Domestic and Regional Connectivity” on Wednesday, 10 June 2026, at the National Defence University (NDU), Islamabad. The seminar was graced by the presence of the Chief Guest, Abdul Aleem Khan, Federal Minister for Communications. The event aimed to critically examine Pakistan's transportation approach and evaluate the strategic importance of road and rail infrastructure in fostering economic growth, regional integration, national connectivity and sustainable development.

The seminar included structured thematic and technical sessions that brought together experts and practitioners to discuss the historical development of Pakistan's transport sector, the comparative advantages and disadvantages of road and rail networks, current infrastructural and operational challenges, and future policy directions for an efficient and integrated transport system.

The event featured participation from a diverse group of stakeholders, including policymakers, representatives from relevant government ministries and departments, transportation experts, economists, academics, researchers, and private logistics professionals. This wide-ranging participation enabled a comprehensive and informed dialogue on Pakistan's transport priorities.The discussions highlighted the necessity for a balanced, multimodal transport framework that improves efficiency, reduces costs, boosts economic competiti-veness, and utilises Pakistan's geostrategic location as a regional transit hub.

PROGRAMME - SEMINAR

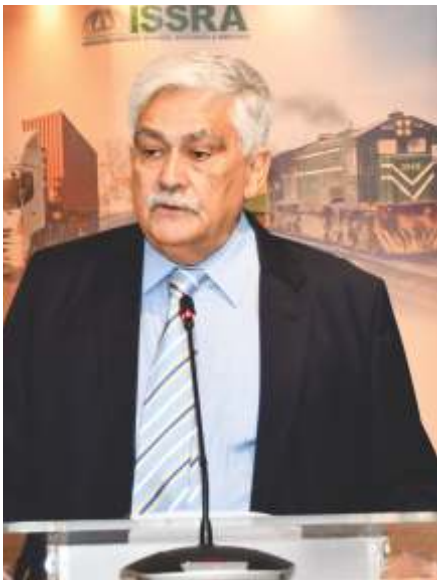
Time (Hrs)	Activity	Speakers	Venue
Opening Session			
0930-1000	Registration	-	ISSRA Hall
1000-1005	Recitation	-	ISSRA Hall
1005-1015	Welcome Remarks	President NDU/DG ISSRA	‘’
1015-1030	Keynote address	Dr Nadeem-ul-Haq, Former Vice-Chancellor, PIDE	‘’
1030-1035	Group Photo	-	Colb Wall
Session 1 Evolution of Transport Systems in Pakistan			
1035-1040	Introductory Remarks	Ayesha Khan, Development Economist	ISSRA Hall
1040-1055 (15 Mins)	How has road transport in Pakistan evolved, and what is its current role and condition?	Ali Sher Mahsud, Federal Secretary, Ministry of Communications (MoC)	‘’
1055-1110 (15 Mins)	How has Pakistan’s railway (PR) system progressed, and what is its current state in terms of infrastructure and services?	Syed Mazhar Ali Shah, Federal Secretary / Chairman Pakistan Railways	“
1110-1125 (15 Mins)	What are the major shortcomings in Pakistan’s road and railway sectors, and what measures can improve their efficiency, connectivity, and long-term sustainability?	Amer Zafar Durrani, President of Reenergia Impact	“
1125-1155	Q/A Session	-	“
1200-1215	Tea break		ISSRA Lounge
Session-2 Analysis & Recommendations			
1220-1225	Introductory Remarks by Moderator	Ayesha Khan, Development Economist	ISSRA Hall
1225-1240 (15 Mins)	How does Pakistan’s existing communication infrastructure make road transport a more effective driver of economic growth and connectivity than railways?	Shoaib Ahmad Siddiqui, Former Federal Secretary, Ministry of Communications	“
1240-1255 (15 Mins)	What is the global approach to transport development, particularly the balance between Road & Rail?	Arturo Ardila Gomez, Lead Transport Economist in the Middle East and North Africa Region of the World Bank, Washington DC	ISSRA Hall **(On Zoom)**
1255-1310 (15 Mins)	What should Pakistan prioritise for the future: Railways or Roads, and why?	Engineer Faizan Ali, Ministry of Planning, Development & Special Initiatives	ISSRA Hall
1310-1340	Q/A Session	-	“
1340-1350	Concluding Remarks by Special Guest	Dr Mohammad Jehanzeb Khan, Secretary, Apex Committee for the Special Investment Facilitation Council (SIFC)	‘’
Closing Session			
1350-1400	Keynote address by the Chief Guest	Abdul Aleem Khan, Federal Minister for Communications	“
1400-1405	Vote of thanks	President NDU/DG ISSRA	“
1405-1410	Group Photo	-	Colb Wall
1410	Lunch	-	Banquet Hall

KEY TAKEAWAYS

- Participants consistently emphasised that Pakistan's transport challenge is primarily not a choice between road and rail, but the lack of an integrated and strategically coordinated transport system. Roads, railways, ports, aviation, inland waterways, and logistics infrastructure should function as complementary parts of a unified national transport framework to enhance connectivity, efficiency, and economic competitiveness.
- Discussions underscored that transport infrastructure should be seen as a strategic factor for economic growth rather than just a means of mobility. Efficient transport systems lower logistics costs, enable trade, enhance industrial competitiveness, support regional integration, and directly boost national productivity.
- A recurring theme throughout the seminar was that Pakistan's heavy reliance on road transport has caused high economic and operational costs, such as higher fuel use, increased road maintenance expenses, congestion, and logistics inefficiencies. While roads remain vital for passenger transport and last-mile connectivity, participants agreed that a more balanced modal mix is crucial for long-term sustainability.
- Participants highlighted that rail transport remains the most efficient mode for transporting bulk commodities and long-distance freight. Revitalising Pakistan Railways through infrastructure modernisation, improved operational efficiency, enhanced freight services, and stronger commercial management was identified as essential for reducing logistics costs and improving freight competitiveness.
- Discussions underlined that decades of uneven investment and policy priorities have contributed to the gradual decline of the railway sector while reinforcing dependence on road transport. Addressing this imbalance requires sustained investment, institutional reforms, and long-term policy continuity rather than isolated infrastructure interventions.
- Participants observed that Pakistan's geostrategic location offers major opportunities to boost regional trade and connectivity by acting as a transit corridor linking South Asia, Central Asia, China, and West Asia. Achieving this potential requires efficient multimodal transport routes, modern logistics infrastructure, and enhanced cross-border connectivity.
- A recurring opinion was that transport infrastructure alone cannot enhance logistics performance without corresponding improvements in ports, freight terminals, warehousing, customs procedures, and supply chain management. Greater integration between transport modes and logistics systems is vital for improving trade facilitation and lowering freight costs.
- Participants highlighted the importance of exploring the potential of inland waterways and maritime transport as complementary components of Pakistan's freight network. Diversifying freight movement across multiple transport modes would enhance logistics resilience, improve efficiency, and reduce pressure on the national road network.

- Discussions underscored that fragmented institutional responsibilities continue to constrain effective transport planning and implementation. Stronger coordination among transport-related ministries, planning institutions, and implementing agencies was identified as essential for developing a coherent national transport strategy. Participants also highlighted the potential benefits of establishing a unified Ministry of Transport & Communications to improve policy coordination and optimise resource utilisation.
- Participants stressed that transport planning should be guided by long-term national objectives, evidence-based policymaking, and comprehensive cost-benefit analysis rather than short-term project cycles. Infrastructure investments should be assessed according to their contribution to productivity, logistics efficiency, and broader economic development.
- Discussions emphasised that transport systems should be designed to support productive cities, industrial clusters, and economic corridors. Improved connectivity between production centres, markets, ports, and regional trade routes would strengthen Pakistan's manufacturing base and enhance export competitiveness.
- Participants noted that digitalisation and technological innovation are becoming increasingly important for modern transport systems. The adoption of intelligent transport systems, digital freight management, real-time tracking, and modern logistics technologies can significantly improve operational efficiency, transparency, and service delivery across the transport sector.
- Public-private partnerships were acknowledged as an important mechanism for mobilising investment, strengthening logistics services, introducing innovation, and improving the operational efficiency of transport infrastructure. Greater collaboration between the public and private sectors was considered essential to address Pakistan's growing transport needs.
- Environmental considerations were recognised as an increasingly important element of transport planning. Participants observed that greater utilisation of rail freight can improve energy efficiency, reduce fuel consumption, and lower transport-related emissions while supporting more sustainable freight movement.
- Participants agreed that transport policy should move beyond isolated sectoral planning towards a systems-based approach that integrates transport with economic planning, industrial development, urbanisation, regional connectivity, and national development objectives. Such an approach would enable more efficient resource allocation and improve the overall performance of Pakistan's transport sector.
- Overall, participants concluded that Pakistan's future transport strategy should move beyond the traditional "road versus rail" debate towards a balanced, integrated, and future-oriented transport system. Developing complementary transport modes, strengthening institutional coordination, modernising logistics networks, and ensuring consistent policy implementation will be essential for enhancing Pakistan's economic competitiveness and fully leveraging its strategic geographic position.

INAUGURAL SESSION



- The seminar highlighted the strategic significance of transportation infrastructure in shaping Pakistan's economic and geopolitical future. Efficient transport systems are essential for national integration, trade facilitation, and regional connectivity.
- Transportation policies must align with broader national development goals. Infrastructure investments should support economic productivity, industrial growth, and social cohesion.
- Pakistan's transport sector faces structural challenges arising from decades of uneven investment patterns and inadequate institutional coordination. Addressing these challenges requires comprehensive policy reforms.
- Sustainable connectivity demands a balanced assessment of both road and rail transportation. Policy decisions should be guided by economic efficiency, environmental sustainability, and long-term national interests.
- Regional developments and emerging trade corridors have increased the importance of Pakistan's transportation network. Enhanced connectivity can strengthen Pakistan's role in regional commerce and transit.
- The transport sector must adapt to evolving economic realities, including urbanisation, industrial expansion, and increasing freight demands. Future planning should account for these emerging trends.
- Effective transportation systems are indispensable for improving competitiveness and reducing the cost of doing business. Infrastructure inefficiencies directly affect economic growth prospects.
- National transportation planning should be based on integrated frameworks rather than isolated projects. Synergy among various transport modes is essential for maximising benefits.
- Policymakers were encouraged to prioritise long-term strategic planning over short-term interventions. Consistency in policy implementation is critical for achieving sustainable outcomes.
- The discussion underscored the need for informed dialogue among stakeholders to formulate practical and evidence-based transportation policies for Pakistan.dispute into an instrument of national cohesion, stability, and sustainable growth.

SESSIONS

SESSION-I

- Roads and railways should not be viewed as competing modes of transport but as complementary components of an integrated national transport system. Each mode possesses distinct comparative advantages that should be utilised through a clearly defined national transport framework.
- An effective national transport policy should allocate specific roles to road and rail transport based on their operational strengths. Roads are better suited for flexible, door-to-door services, while railways are more efficient for long-distance, bulk freight transportation.
- Pakistan's road transport system has evolved over seven decades from a basic connectivity network into the country's dominant mode of transportation. This transformation has significantly contributed to national integration, economic growth, and regional connectivity.
- Pakistan inherited a strong transport foundation comprising the historic GT Road (N-5) and the British-developed railway network. However, successive development policies increasingly favoured road transport because of its flexibility, accessibility, and ability to connect remote regions.
- The first phase (1947–1979) focused on nation-building through the expansion of highways and rural roads. Major projects, including the Karachi–Hyderabad Superhighway, Indus Highway, Karakoram Highway, and RCD Highway, strengthened national and regional connectivity.
- The second phase (1980s–1990s) marked a shift from basic to strategic connectivity. The Karakoram Highway emerged as a landmark engineering achievement, strengthening Pakistan's link with China while promoting socio-economic development in northern areas.
- The establishment of the National Highway Authority (NHA) in 1991 introduced a centralised framework for planning, developing, operating, and maintaining the federal road network. It further enhanced road safety and operational efficiency.
- The development of Pakistan's motorway network, beginning with the M-2 Motorway (Islamabad–Lahore), introduced international standards of engineering, traffic management, and access-controlled highways. These investments significantly improved travel efficiency, safety, and transport reliability.
- The third phase (2000s–present) has been driven by economic corridors, logistics integration, and regional connectivity, particularly under CPEC. Major investments in motorways and strategic highways have strengthened links between ports, industrial hubs, border crossings, and underdeveloped regions.

- Road transport has become the backbone of Pakistan's transport sector, carrying approximately 92% of passenger traffic and 96% of freight movement. The national road network now exceeds 500,000 kilometres and supports a vehicle fleet of more than 40 million.
- Pakistan's road network has evolved from serving domestic transportation needs to becoming a strategic component of regional trade and transit. Corridors linking Afghanistan, China, Iran, and major seaports have enhanced the country's role as a regional connectivity hub.
- Future transport policy should focus on developing smart, safe, and sustainable transport corridors through intelligent transport systems, digital tolling, GIS-based asset management, and data-driven infrastructure planning to improve long-term efficiency and competitiveness.
- Global transport trends indicate a renewed emphasis on railway development due to its economic, environmental, and energy efficiency advantages. Countries such as China and India continue to invest heavily in railway infrastructure to enhance competitiveness and sustainable economic growth.
- Rail transport offers significant economic benefits through superior fuel efficiency, lower logistics costs, and reduced foreign exchange expenditure on fuel imports. Increasing Pakistan Railways' freight market share could substantially reduce national transportation costs and improve industrial competitiveness.
- Railways contribute to environmental sustainability by generating significantly lower carbon emissions than road transport while also reducing congestion, road accidents, and the deterioration of highway infrastructure caused by heavy freight vehicles.
- Pakistan Railways should be recognised as a strategic national asset rather than a purely commercial enterprise. Beyond its economic role, it supports national defence requirements, provides essential public services, and strengthens national integration across all provinces.
- The absence of a comprehensive national transport policy until 2018 contributed to fragmented planning and institutional competition among different transport sectors. Although the National Transport Policy and National Freight and Logistics Policy were formulated, weak implementation has limited their impact.
- Effective multimodal transport planning requires comprehensive institutional reforms, including the establishment of a unified Ministry of Transport & Communications or an empowered national transport coordination body to ensure integrated planning, coordinated investment, efficient resource allocation, and coherent policymaking across all transport modes.

- Decades of disproportionate investment in road infrastructure, compared with railways, have contributed to the decline of Pakistan Railways despite its strategic importance. Rebalancing investment priorities is essential to establish a more efficient, sustainable, and resilient national transport system.
- The proposed reform agenda for Pakistan Railways focuses on financial sustainability, governance reforms, infrastructure modernisation, public-private partnerships, technological advancement, and the completion of strategic projects such as ML-1. These reforms aim to expand freight capacity, strengthen regional connectivity, and improve Pakistan's long-term economic competitiveness.
- Pakistan's transport challenges stem primarily from weak governance, fragmented institutional coordination, and the absence of integrated transport planning, rather than from inadequate infrastructure alone. The discussion emphasised that building new infrastructure cannot resolve systemic inefficiencies without effective policy implementation, stronger inter-agency coordination, and integrated transport governance.
- Although Pakistan Railways faces significant financial liabilities, its operational performance has improved, demonstrating that railway services can become commercially sustainable if structural issues such as pension liabilities and governance constraints are addressed.
- Railway infrastructure should be evaluated primarily on its contribution to trade, logistics, and economic productivity rather than being justified solely on strategic or historical grounds. Modern railway systems must function as efficient transport utilities serving national economic needs.
- Pakistan has made considerable investments in transport infrastructure, including highways, ports, digital trade platforms, and proposed railway upgrades. However, the absence of a central authority responsible for integrating these assets has limited the overall efficiency of the national transport system.
- Future transport reforms should prioritise the commercialisation of Pakistan Railways, the restructuring of the National Highway Authority's development and maintenance functions, and the development of an efficient, internationally connected transport system that enhances national competitiveness and long-term sustainability.
- Improving logistics performance requires operational reforms beyond infrastructure development. Stronger axle-load enforcement, reduced container dwell times at ports, and better coordination among government agencies would significantly improve freight movement and reduce logistics costs.

- Pakistan's railway network should be modernised with greater emphasis on international connectivity. Transitioning toward standard-gauge interoperability would facilitate seamless rail links with neighbouring countries, strengthen regional trade corridors, and improve Pakistan's integration into global transport networks.
- Long-term reforms should emphasise institutional coordination, regulatory enforcement, commercial viability, and multimodal connectivity to enhance Pakistan's economic competitiveness.
- The session highlighted how the commercialisation and restructuring of Pakistan Railways, particularly through governance reforms, public-private partnerships, operational autonomy, and the separation of commercial activities from legacy liabilities such as pension obligations, received broad support from the public.
- Participants stressed that transport planning should be guided by **national economic efficiency rather than institutional competition.** Investment decisions should prioritise logistics performance, trade facilitation, and long-term economic returns instead of allocating resources separately to individual transport modes.
- The discussion also highlighted the need to improve **port efficiency and freight logistics** by reducing container dwell times, strengthening customs coordination, and integrating ports more effectively with road and rail networks.
- Pakistan's **regional connectivity strategy** should extend beyond domestic infrastructure development to facilitate seamless transport links with neighbouring countries. Improved cross-border rail and road connectivity was viewed as essential for maximising the benefits of regional trade initiatives, including CPEC and Central Asian corridors.

SESSION-II

- The session commenced by examining Pakistan's transport strategy within the broader context of domestic infrastructure development, regional connectivity, and international best practices. Discussions focused on identifying practical pathways for developing a more competitive and integrated national transport system.
- Discussions began by highlighting Pakistan's extensive road network and its historical expansion in response to growing mobility and connectivity requirements across both urban and rural areas.
- Road infrastructure was described as a major driver of economic development due to its accessibility, flexibility, and ability to connect remote communities with markets and services.
- The discussion emphasised that the dominance of road transport is largely attributable to its extensive network, ease of construction, and ability to provide direct doorstep connectivity.
- The expansion of highways and motorways under successive governments, including projects developed through CPEC, was identified as a major contributor to improved national and regional connectivity.
- Road infrastructure was recognised as an important source of employment generation, commercial activity, and local economic development along transport corridors.
- It was observed that road connectivity has expanded into geographically challenging regions, improving accessibility while supporting tourism and regional development.
- The discussion highlighted that sustained political support and public demand have consistently favoured investment in road infrastructure over railways.
- Several structural constraints limiting railway competitiveness were identified, including limited network expansion, ageing infrastructure, workshop capacity constraints, and inadequate public investment.
- Delays in implementing major railway initiatives, particularly ML-1, were cited as increasing project costs, reducing investor confidence, and weakening the long-term competitiveness of Pakistan Railways.
- It was noted that inconsistent policy implementation and changing government priorities have contributed significantly to the slow progress of railway modernisation.
- Greater emphasis was placed on improving road safety, vehicle fitness, corridor development, and regional connectivity while simultaneously stressing that sustainable transport development requires roads and railways to function as complementary components of the national transport system.

- The deliberation then broadened from Pakistan's domestic experience to international practice, where examples from major global transport corridors were used to demonstrate successful transport systems which rely on an optimal combination of roads, railways, and inland waterways rather than dependence on a single transport mode.
- The discussion stressed that transport planning should prioritise logistics efficiency through door-to-door connectivity instead of evaluating individual transport modes in isolation.
- Market distortions within freight transport, including truck overloading, informal trucking practices, and inefficient pricing mechanisms, were identified as major contributors to infrastructure deterioration and operational inefficiency.
- Stronger enforcement of axle-load regulations, improved pricing mechanisms, and better labour standards within the trucking sector were proposed to create a more balanced transport market.
- Railway revitalisation was presented as requiring not only infrastructure upgrades but also institutional reforms, commercial orientation, and greater private-sector participation.
- International case studies demonstrated that railway modernisation programmes are most effective when governance reforms and modern signalling systems accompany infrastructure investment.
- The importance of multimodal logistics hubs, containerization, and digital technologies was highlighted as essential for improving freight efficiency and supply chain performance.
- Building on the international perspective, the discussion returned to Pakistan's transport planning framework, reviewing historical investment patterns, policy evolution, and current development priorities.
- The National Transport Policy was discussed, analysing how the framework intended to integrate roads, railways, aviation, maritime transport, and inland waterways under a unified national vision.
- The discussion also emphasised the need for a National Transport Data Observatory to improve evidence-based planning through reliable and comprehensive transport data.
- Current transport priorities were presented as focusing on regional connectivity, ML-1 upgradation, strategic motorway expansion, and improved connectivity in underserved regions such as Balochistan.
- It was acknowledged that balancing investment between roads and railways remains difficult because of political demands, regional development priorities, and limited public resources.

- It was emphasised that despite the adoption of the National Transport Policy (2018) and the National Freight and Logistics Policy, effective implementation remains the primary challenge. Effective execution of these policies is essential to address Pakistan's long-term transport and logistics challenges.
- Pakistan's transport strategy should be evaluated in the context of broader national challenges, including economic sustainability, climate change, pollution, fuel consumption, flooding, water management, and energy security. Transport planning should therefore adopt a holistic, cross-sectoral perspective.
- Enhancing regional connectivity through initiatives such as CPEC and trans-regional trade corridors will require Pakistan to offer competitive and low-cost logistics solutions. Developing multimodal transport, including river transport alongside road and rail, could significantly strengthen Pakistan's regional trade competitiveness.
- An additional perspective introduced during the discussion was the potential of inland (riverine) transport. Participants noted that Pakistan's river system remains an underutilised national asset that could provide a cost-effective, energy-efficient, and environmentally sustainable mode of freight transportation.

- Inland water transport was introduced as a potentially transformative component of Pakistan's transport system capable of reducing logistics costs while supporting flood management, energy efficiency, and environmental sustainability.
- It was argued that developing navigable waterways should be considered within a broader multimodal transport strategy rather than as an alternative to roads or railways.
- During the interactive discussion, participants questioned whether major transport investments, including flyovers and signal-free corridors, are consistently supported by comprehensive economic cost-benefit analysis.
- Questions were also raised regarding the persistent imbalance between road and railway financing, the implementation gap between transport policies and development plans, and the influence of political priorities on infrastructure investment decisions.
- Responses highlighted that transport projects undergo technical and economic appraisal through established planning mechanisms, although implementation is often constrained by fiscal limitations, competing national priorities, and institutional processes.
- The session concluded with broad agreement that Pakistan's future transport strategy should prioritise integration rather than competition by strengthening coordination among roads, railways, and emerging transport modes within a unified national transport framework.

CLOSING SESSION

- The concluding remarks reaffirmed that the transport debate should not be framed as road versus rail, as both modes perform distinct yet complementary roles within an integrated national transport system.
- It was emphasised that the growing imbalance between road and rail development is rooted in the shift towards constituency-driven infrastructure development, where political priorities have increasingly displaced long-term development planning.
- The discussion stressed that transport investments should be guided by national development needs rather than short-term political demands, as this imbalance has contributed to distortions in both transport infrastructure and broader economic planning.
- The discussion highlighted that transport policy, development plans, and implementation programmes must remain aligned. Weak coordination between these components was identified as a major cause of ineffective policy implementation and inconsistent infrastructure development.
- A long-term national transport architecture was proposed, with railways serving as the country's primary north-south freight corridor while roads provide complementary regional, east-west, and last-mile connectivity.
- It was proposed that commercially viable highways and motorways should increasingly rely on private-sector investment and user-financed models. At the same time, public resources should be prioritised for strategically important and economically underserved regions.
- Greater private-sector participation in railway infrastructure and operations was recommended through appropriate institutional and regulatory reforms to improve efficiency, competitiveness, and long-term financial sustainability.
- It was argued that transport planning should extend beyond road widening to incorporate broader mobility considerations, including public transport, pedestrian infrastructure, cycling facilities, and alternative traffic management solutions.

- It was observed that Pakistan's institutional separation of these sectors continues to constrain integrated transport planning. Progress made in strengthening transport financing and advancing strategically important connectivity projects was also highlighted.
- The closing session concluded by reaffirming that Pakistan's future transport strategy should prioritise integrated planning, stronger institutional coordination, and balanced investment across complementary transport modes to bridge the persistent gap between policy formulation and implementation.


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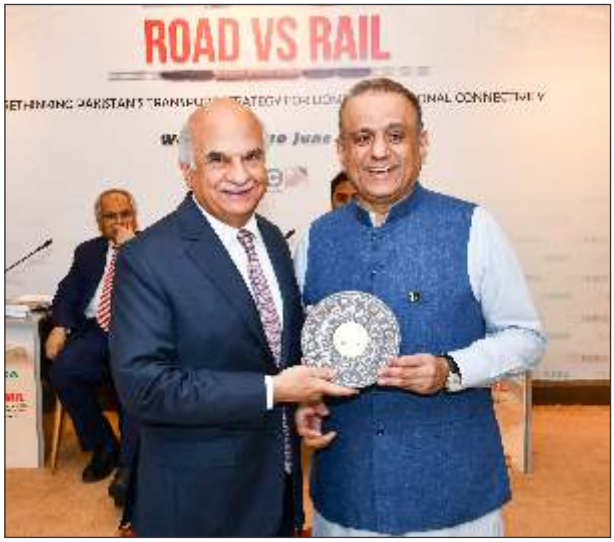
PHOTO GALLERY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