

**RESEARCH PAPER****Exploring Potential Benefits of CPEC for Balochistan's Mining Industry: An Urban Development Perspective****¹Saira Naeem, ²Madiha Ghafoor and ³Arsala Hashmi**

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Corresponding Author saira.naeem@umt.edu.pk**ABSTRACT**

This paper investigates the potential of CPEC for Balochistan's Mining industry. The SEZs are considered backbone of economic development for countries and with Belt and Road Initiative (BRI) Pakistan is eyeing on capitalizing on the growth potential of different industries. However, the speed of development is pressing concern for many stakeholders. This paper presents findings from a longitudinal qualitative study. Primary fieldwork (Phase I) was conducted in 2016–2017 with 16 purposively selected informants. In late 2025 and early 2026, six to seven of the original informants were re-interviewed via telephone and video call (Phase II) to assess their current perspectives considering a decade of CPEC implementation. Statistical data and project references have been updated to reflect developments through 2025–2026. The responses clearly show that situations at SEZs are still stagnant and have not moved an inch. The respondents, while still hopeful with the potential, disregard the chances of growth associated with CPEC. The reasons for such slowness could be classified in political, economic and geographic issues of late.

Keywords: Potential Benefits of CPEC, Balochistan's Mining Industry, Urban Development Perspective**Introduction**

Balochistan is Pakistan's largest province by land mass, constituting approximately 44 percent of the country's total area, yet it accounts for only five to six percent of the national population (Bashir Baloch, 2025; Barrech et al., 2023; Muzaffar, et. al., 2018). Its 750-kilometre Arabian Sea coastline positions it at the intersection of South Asia, Central Asia, and the Middle East, endowing the province with extraordinary geostrategic value. But despite the humongous natural and mineral wealth of this province, Balochistan has always been at the bottom of all the development indexes of the nation. There is underdeveloped infrastructure and most residents do not have access to potable water and electricity, roads, and educational facilities (Haq & Zia, 2013; Zafar et al., 2024). Around 40% of the population are living under the poverty line and there is high levels of unemployment (Zeb, 2018).

The Province is blessed with a wealth of minerals. Some of the documented deposits are natural gas, oil, coal, copper, sulphur, fluorite, gold etc. (Aslam, 2011). The amount of natural resources under Balochistan is estimated to be over US\$1 trillion, which includes copper, gold, chromite and rare earth minerals (Barrech et al., 2023). These resources, however, have always brought national revenues and for multinational corporations, but not for the local communities. Balochistan is an example of the Resource Curse Thesis and Dependency Theory/Core-Periphery Theory which states that peripheral regions have a disadvantage of providing raw materials for the peripheral core and do not produce enough value and development (Muzaffar, et. al., 2021; Sachs & Warner, 1995; Frank, 1967).

Ten years on from the establishment of CPEC in 2015, there have been bright sides and dark sides of Balochistan. Overall, the corridor has made huge strides at the national level with the successful completion of 17 energy projects with a capacity of 8904 MW, more

than 200,000 direct and indirect jobs (Pakistan Economic Survey, 2024-25) and the complete operation of the port of Gwadar. Sadly, the investment in Balochistan has been hugely skewed. The total amount of funds spent on completed CPEC projects in the country is \$25.4 billion, only \$3.2 billion of which have been allocated to Balochistan, \$1.9 billion of which was allocated to a coal power plant in Hub District which mainly benefits other provinces (Voice of Vienna, 2025; Barrech et al., 2023). CPEC has not built any motorway in Balochistan. The aspirations of “Singapore of the future” were not even realised in Gwadar as residents continue to experience regular power cuts, water shortages, and inadequate health facilities (Barrech et al., 2023; Bashir Baloch, 2025).

But it's not all bad and it's changing. The Khuzdar-Basima Highway (N-30, 110km) has gone through Khuzdar District and is one of the densest mineral belts in Balochistan, the Duddar lead and zinc-barite deposits, in production, are located right on its way (Dunya News, 2025). The Reko Diq copper-gold project was revived in 2022 after a decade in the news with an out of court settlement with Barrick Mining Corporation and will be in operation from 2028 with a peak of 7,500 construction jobs expected (Barrick, 2022). Most importantly, the China–Pakistan Action Plan 2025–2029 signed during the Chinese PM's visit to Beijing in September 2025, calls upon both governments to move forward and explicitly encourage geological surveys, geological capacity building in Balochistan, and Chinese investment in the mining industry of Balochistan (Government of China & Government of Pakistan, 2025).

In this backdrop, the results of longitudinal qualitative study are presented regarding the importance of CPEC in the Mining Industry of Balochistan. This study consists of 2 stages. Phase I (2016 – 2017) comprised of interview with 16 informants with government, industry, academia and local government regarding the possibility of CPEC. Six of these original informants were re-contacted for a phone and video call during Phase II (late 2025/early 2026) to contemplate some of these changes over the decade. It is a longitudinal study which allows the paper to test the validity of the predictions of the informants and to see what structural barriers have remained. Despite of the identified gaps in Phase I, which comprises information asymmetry, lack of value added processing, SEZ misalignment, governance gaps and local exclusion, the overall findings in Phase II re-interviews remain the same as there is a need for further strengthening of the mining capability of CPEC for better benefit of the provinces.

Literature Review

Mineral Resources of Balochistan

Pakistan possesses nine mineralogenic and metallogenic zones in total, of which five are located in Balochistan. The province has recorded the presence of over 51 metallic and non-metallic minerals, 40 of which are actively mined (Barrech et al., 2023). The Geological Survey of Pakistan (GSP) has identified 36 commercially significant minerals in Balochistan, including antimony, copper, gold, fluorite, gypsum, and magnetite. Non-metallic minerals include barite, marble, gypsum, limestone, coal, dolomite, calcite, and silica sand (Sohail et al., 2013). Balochistan's geology is subdivided into five metallogenic zones.

The Chaghai–Raskoh arc in the northwest is economically the richest belt in Pakistan, hosting major deposits of copper and gold. Two of the province's most significant mining projects, Reko Diq and Saindak, are located within this district. Reko Diq hosts one of the world's largest undeveloped copper–gold deposits, with estimated reserves of 5.9 billion tonnes of ore. The Makran–Siahan belt contains further economic minerals including gold, silver, quartz, and mercury (Malkani, 2015). The Khuzdar–Lasbela belt is equally significant: it hosts substantial lead-zinc-barite deposits including the Duddar mine — developed by Chinese firm MCC Huaye and in commercial production since 2015 — and a 69 million tonne barite-lead-zinc resource at Gunga in Khuzdar District currently in mine

planning (Pakistan Mineral Marvel, 2024). The province is estimated to hold over US\$1 trillion in total natural resources (Barrech et al., 2023).

Mining Industry of Balochistan

The mining industry in Balochistan is in very nascent stage on available resources. Some contributing factors are inadequate infrastructure, poor road and rail connectivity, poor water, electricity and gas supply, low population density and scattered population and the presence of insurgents (Aslam, 2011). Although Balochistan is a province with huge endowments of natural gas and coal, the locals are deprived of using them; only 25 per cent of the province's population has access to electrification while only about 80 per cent can access natural gas extracted from Sui, which indicates the phenomenon of resource curse in Balochistan as described by Sachs and Warner (1995), Barrech et al., (2023) and Bashir Baloch (2025). In the Province, most mining is done in small-scale mining. The contribution of mining and quarrying in the national GDP in fiscal year 2016-17 is reported to be around 2.9 percent, which further declined to 2.1 percent by fiscal year 2024-25 after four years of decline (Dawn, 2026). This is a route that mirrors the difference between the natural resources and performance of the economy in Balochistan.

Many of the small-scale miners drive up the operating expenses, and hinder the investment of industrial miners. The current set-up is not capable of supporting the large scale mining operations as it demands heavy equipment, trained workers, and standards in Health, Safety, and Environment (HSE) standards that are not met. The minerals are primarily being exported in raw form, thus generating little value-addition and benefits to local economies. In the past, the amount of royalties and rents was reported as just 538 million rupees pr year (USAID, 2013). In the case of Chile, as Informant 16 in this study pointed out, adding value is not enough to generate jobs and social development; extraction is not enough.

Local Perceptions of CPEC in Balochistan

A number of primary studies validate the perception of Baloch that there is a disconnect between official CPEC story and their perception. After 10 years of initiation of CPEC, the government and the people of Balochistan are not enjoying the peace and tranquility, there is a widespread discontentment, which has been reported by Barrech et al. (2023) in interviews with politicians, academics, and journalists in Balochistan. They all acknowledged the potential of CPEC but were unanimous as regards unequitable benefits that Balochistan has derived from it. The most comprehensive quantitative data on Baloch perceptions is given by Bashir Baloch (2025) which consists of survey of 250 respondents in Kech, Gwadar, Panjgur, Quetta and Kalat. The findings of the survey are scaring: 54 per cent had negative perception of CPEC as a whole; 52 per cent indicated lack of trust on government promises on CPEC; 56.4 per cent indicated that they were concerned about the impact of CPEC on their cultural identity; and only 21.6 per cent indicated that they felt they were getting the benefits of CPEC fairly while only 8 per cent said they have received any skills training from CPEC. But 92 per cent of the respondents maintained human resource development should be the main agenda of CPEC in Balochistan.

A mixed method study also reveals that CPEC has brought few tangible economic benefits to urban Gwadar with an estimated 10,000 jobs created in Gwadar port, and the poverty rate in urban Gwadar decreased by 5 per cent from 2016 to 2022, while the volume of trade through the port rose by 30 per cent during the same period (Zafar et al. 2024). The rural area of Balochistan has been largely neglected. Local employment, the environment and maintaining the local culture are all important concerns in the community. In the long run inclusive governance and genuine inclusive community engagement are essential prerequisites and not an "add-on" to the success of CPEC in the province, the authors conclude (Rahim, et. al., 2018).

The findings corroborate the previous findings of Bashir, Arshad and Barech (2019) that highlighted low involvement of the local communities in the CPEC planning process, and the previous finding by Mujahid (2022) that security threat to CPEC is not only coming from outside manipulation but also the local grievances over resource extraction without local benefits. The capture of the Indian intelligence operative Kulbhushan Yadav from Balochistan and the unearthing of RAW's links with separatist groups by external agencies have been used by the latter to the separatists' advantage over these legitimate issues. These are the legitimate issues that are being used by the external players to the advantage of separatist organizations such as the Mujahid or RAW. But, as Barrech et al. (2023) note, it would be a mistake to believe that external interference is the sole reason behind the problems in Balochistan as the structural marginalisation of the province is the failure of internal politics which has been going on in the province since before CPEC.

Balochistan and CPEC

Balochistan is the least developed province of Pakistan and the residents of the province are living in poverty in large numbers. The feeling of abandonment from the Federal Government on the areas has increased over the past few decades and there has been resentment toward the Federal Government. CPEC has received a lot of hope that it will bring infrastructure investment and economic connectivity to China that the government could not even think of achieving.

No development program can proceed without roads and/or electricity. A significant amount of investment has been made in both of Balochistan under the CPEC, the first, Khuzdar-Basima Road (N-30, 110 km) is completed and the second is the Eastbay Expressway Phase I, valued at \$179 million. Now the New Gwadar International Airport, with a value of \$230 million, funded as a Chinese grant, is already up and running. The constructions of Awaran-Nal Road (168 km), Nokundi-Mashkhel Road (103 km), M-8 (146 km) Awaran-Zhob Road and Quetta-Zhob Road (298 km) are in progress (Dunya News, 2025). Development of the Bostan Special Economic Zone is going on in Public-Private Partnership (PPP) model while the development of Gwadar Free Zone Phase II is ongoing under BOT model. With the introduction of CPEC 2.0, the count of approved SEZs in Pakistan has jumped from 7 in 2019 to 44 till 2025, with Bostan remaining the only SEZ in Balochistan (Profit by Pakistan Today, 2026).

The last endorsement of CPEC mining aspirations was in the China–Pakistan Action Plan 2025–2029 signed during the visit of the Pakistani Prime Minister Shehbaz Sharif in September 2025. It explicitly commits both governments to actively encourage Chinese investment in the mining industry of Pakistan and mining industrial parks (Government of China & Government of Pakistan, 2025, Section II, Point 2). It also agrees to step up cooperation in the fields of geology and mining, basic geological surveys and mineral potential evaluation in Pakistan and cooperation between the Chinese government and the Pakistani government in the geotechnical capacity building area (Government of China & Government of Pakistan, 2025, Section II, Point 4). These commitments are a direct policy level response to these gaps in the structure of the system identified by informants in this study and give new impetus to the findings detailed here. CPEC has also been a catalyst for the mining sector of Balochistan to become a key contributor to economic growth, as long as the governance and local inclusiveness challenges are addressed, albeit Phase II of the CPEC has since changed its focus from infrastructure-based development to industrialisation, technology transfer and export-based development (Pakistan Observer, 2026).

Material and Methods

This study employs a longitudinal qualitative design across two phases of data collection separated by approximately nine years. Phase I (2016–2017) established baseline

perspectives on CPEC's potential for Balochistan's mining sector; Phase II (late 2025–early 2026) revisited a subset of original informants to assess change over time. Such a longitudinal design is particularly well-suited to evaluating long-term infrastructure initiatives like CPEC, as it allows assessment of whether early perceptions and predictions were borne out by subsequent events (Creswell & Poth, 2017; Shah, et. al., 2020). Within the qualitative paradigm, a case study strategy was selected to enable systematic, in-depth examination of the issue within its real-world context. Phase I data collection (2016–2017) employed semi-structured, open-ended interviews as the primary instrument, covering informants' awareness of CPEC routes, proposed SEZs, the mining sector relationship, economic and social benefits, and implications for mining-dependent communities (Bhatti, Aslam, Hassan, & Sulaiman, 2016). Phase II data collection (late 2025–early 2026) involved telephone and video-call re-interviews with six to seven of the original informants who remained accessible and willing to participate. Re-interview questions focused on: (1) how the informant assessed CPEC's actual impact on Balochistan's mining sector relative to their 2016–2017 expectations; (2) whether the structural obstacles identified then had been addressed or had intensified; and (3) their priorities for CPEC Phase II in the province. To minimise interviewer bias, open-ended and probing questions were used throughout both phases.

Sampling and Informant Profile

A purposive sampling strategy was employed for Phase I, selecting 16 informants who possessed relevant professional knowledge and direct experience with the subject matter. The sample included senior government officials from the Ministry of Mining, elected members of local government, members of the Quetta Chamber of Commerce and Industry (QCCI), industrialists, academics from higher education institutions, and young mining engineers from mining-dependent areas of Balochistan. All 16 informants were male, reflecting the male-dominant professional and institutional culture of the province. Government-affiliated informants consented to participation only upon assurance of confidentiality.

For Phase II, purposive re-sampling was used to identify informants from the original 16 who had remained professionally active in sectors directly relevant to CPEC and mining, and who were accessible and willing to participate in a follow-up interview. Six informants met these criteria. The re-interview sample included representatives from government, the mining industry, and academia, providing cross-sectoral perspectives on CPEC's evolving impact. Re-interviews were conducted via telephone and video call given the geographic dispersion of informants and continuing security constraints in parts of Balochistan.

Table 1
Informants Profile

S.No	Gender	Title	Age	Experience	Category
1	Male	Senior Government Officer	52	24 Years	Government
2	Male	Senior Government Officer*	43	12 Years	Government
3	Male	Senior Government Officer	47	15 Years	Government
4	Male	Member QCCI*	47	20 Years	Chamber of Commerce
5	Male	Member QCCI	43	19 Years	Chamber of Commerce
6	Male	Member QCCI	51	27 Years	Chamber of Commerce
7	Male	Elected Member Local Govt	37	12 Years	Local Government
8	Male	Elected Member Local Govt	45	15 Years	Local Government
9	Male	Elected Member Local Govt	39	04 Years	Local Government

10	Male	Dy. Manager, Mining Firm*	31	04 Years	Mining Industry
11	Male	Senior Executive, Mining Firm	39	17 Years	Mining Industry
12	Male	Entrepreneur, Mining Firm*	42	20 Years	Mining Industry
13	Male	Assistant Professor (Higher Education)	34	07 Years	Academia
14	Male	Assistant Professor (Higher Education)*	36	06 Years	Academia
15	Male	Mining Engineer (Balochistan)*	28	02 Years	Mining Engineers
16	Male	Mining Engineer (Balochistan)	31	03 Years	Mining Engineers

Note: * represents participants of re-interview

Data Collection and Analysis

Phase I interviews were conducted face-to-face where possible, with audio-recording and subsequent transcription. All interviews were conducted in Urdu, translated with the assistance of a linguistic expert, and transcribed for analysis. Phase II re-interviews were conducted via telephone and video call in late 2025 and early 2026, reflecting both the logistical constraints of the period and the geographic dispersion of informants. These were similarly audio-recorded with informed consent, transcribed, and analysed. Thematic analysis was applied to data from both phases using a hybrid coding approach combining pre-set codes derived from the literature review and Phase I analysis with open codes that emerged inductively from Phase II responses (Gibbs, 2007). A comparative analytical layer was then applied, examining convergences and divergences between Phase I and Phase II responses to identify which concerns had been resolved, which had intensified, and which new themes had emerged over the decade.

Results and Discussion

The findings presented below draw on both phases of data collection. Phase I perspectives (2016–2017) established the baseline; Phase II re-interviews (late 2025–early 2026) allow us to assess what changed, what did not, and what new concerns have emerged. Where re-interview responses are referenced, this is indicated explicitly. Given the sensitivity of informants' positions, all remain anonymised by number.

Awareness of CPEC

The deeper probing revealed that all informants had knowledge of CPEC but there was a considerable variance in their knowledge of CPEC. Out of the total 9 informants, only seven (1, 2, 3, 5, 12, 15 and 16) could describe the three routes of CPEC and define the areas covered by the western route in Balochistan. Knowledge about the proposed SEZs was also limited and only informants 1, 2, 3, and 5 were able to state their location in SEZs while none of them knew which industries will be introduced in SEZs of Balochistan. This deficiency in information has also been confirmed by other studies, such as the study conducted by Bashir Baloch (2025) on Baloch people to know about the CPEC, which found that 64.4 percent of the Baloch community were aware of CPEC, however, they did not possess in-depth information about its routes, SEZ plans, and industrial targeted areas in all the districts surveyed.

Significance of CPEC

The informants' views were quite divided on the importance of CPEC. Ten informants (1, 2, 3, 4, 5, 6, 10, 12, 14 and 15) felt that CPEC is of great importance for foreign investment, development of industry, improving the road connectivity, and improving interaction with outside world. The other six informants (7, 8, 9, 11, 13 and 16) however

were sceptical, basing their views on the experience of the Saindak project that trade and benefit would continue to flow to Punjab and Karachi and not pass through Balochistan. The division of the respondents is similar to the survey conducted by Bashir Baloch (2025) where 52% of the respondents were negative about the economic opportunities of CPEC and 27.6% were positive. As found by Barrech et al. (2023), most vocal critics were Baloch nationalists, especially Akhtar Jan Mengal, who perceived that CPEC would become another East India Company, having stronger political leanings towards the local political parties. Informant 13 claimed the province was not prepared on any side – economic, educational, or political – to capitalize the opportunity presented by the CPEC.

In Phase II re-interviews the sceptical informants were proved to be correct in the majority. In 2016–17, the sceptics found in 2025–2026 said that their scepticism was justified. What we had feared and what we had expected did: the motorways were sold to Punjab, the metro went to Lahore and Gwadar was handed an airport that services few locals, we await something that works for our community. By Phase II, still optimistic informants were a bit more circumspect, while some said the planning commitments in the Action Plan for 2025 offered further cause for optimism (assuming they are delivered). The unequal distribution of the benefits of CPEC's Phase-I has been empirically proven by the sceptical informants, which shows concern. Only 3.2 billion dollars of the investments completed under CPEC have arrived in Balochistan, leaving the remaining amount invested in only one power plant which is providing for the other provinces (Voice of Vienna, 2025).

Mining Industry of Balochistan

All the informants unanimously opined that there is huge potential in the mineral resources of Balochistan which are far from any exploitation. The main problems were identified as lack of policy, international complications and security issues, both from government and local government representatives. “Balochistan has been involved in numerous proxy wars and not been taken into consideration in any policy making, which makes the locals in Balochistan non-developed,” said informant 3. Security instability was a recurring theme as an obstacle to private sector involvement. There were several projects on the go, recognised by informants as providing some benefit to the country, but which they felt would require significant increases in investment – e.g. the Duddar Zinc/Lead Project, the Koh-i-Sultan Sulphur Project, and exploration into the Good Hope coal area. In both the Reko Diq and the Saindak cases, there were many references to the absence of good governance and that of missed opportunities. Since then, the Reko Diq dispute has been settled out of court in 2022 and the project is progressing towards production.

CPEC and the Mining Industry

The importance of development of Balochistan on the basis of mining and the contribution mining makes to the national economy was alluded by all informants. In respect of the mining industry, Informant 3 said the government has already entered into a recruitment process for the Chinese companies to invest in the industry, which is the most important industry for the development of Balochistan province. Informant 14 says the mineral deposits are “foreign reserves for the country — the sooner they are capitalised upon, the better”. With the Chilean example in mind, Informant 16 provided the most analytically-developed view of the sample: “If we can learn from the Chilean experience, we need to recognize that the extraction and transport of minerals is not enough to generate economic value; it is value addition that unlocks jobs and social development. The necessity of site location of processing industries near the extraction sites was also stressed by informants 11, 12 and 14. This is corroborated by the empirical evidence presented by Zafar et al. (2024) which showed that the rural population of Balochistan, though benefiting from the investment in infrastructure by the CPEC, remain economically marginalised with the economic activity limited to Gwadar and not evenly distributed across the resource-rich interior of Balochistan.

In a decade, the re-interviewing in Phase II had brought the consensus about value addition to a significant degree. The absence of close by processing facilities was the only problem all re-interviewed informants identified as the most serious one that needs to be solved. One of the government informants re-interviewed stated: "In 2016 we asked for the industrial parks for mining and this is also included in the 2025 Action Plan, the question was: will it take place this time or will it remain in limbo, just like many other promises we have made before?" A re-interviewed informant from the industry was optimistic about Reko Diq with the proviso that: "If it goes into production in 2028 then if the government of Balochistan demands it be processed locally and people hired locally, which is the situation at Saindak, then it could really be different." The most visible evidence of this is when the Khuzdar-Basima Highway (N-30) is finalized, then the transportation cost will become less of a barrier to extracting minerals in Balochistan with the help of CPEC infrastructure. The highway runs through the Khuzdar District that in addition to the Duddar mine, also contains the Gunga barite-lead-zinc deposit, thus directly connecting these mineral deposits to the national highway system. The 600 jobs created brought a local economic gain, but limited (Minute Mirror, 2025). However, this roadway is a prime example of the study's principal proposition as well, since by the time you reach a downstream processing plant, the roadway is not really beneficial – it's just a way to reduce the cost of getting the raw ore to another location. Not only road construction, but value addition is most crucial.

Conclusion

This study explores the potential of CPEC to transform Balochistan's mining sector and enhance socio-economic development. Evidence from the first decade of CPEC reveals a clear gap between its strategic importance and the limited benefits experienced by local communities, largely due to persistent structural information asymmetry and weak participation in planning processes (Bashir Baloch, 2025; Barrech et al., 2023; Muzaffar, et al., 2018). Although the China–Pakistan Action Plan 2025–2029 reinforces commitments to mining investment, industrial parks, and capacity building, key concerns such as value addition, SEZ placement, governance transparency, and local inclusion remain unresolved. The study concludes that CPEC Phase-II can only succeed if Balochistan shifts from a resource extraction model toward value-added industrialization with meaningful community participation.

Recommendations and Future Research

Based on the findings and drawing on the policy recommendations of Barrech et al. (2023), Bashir Baloch (2025), and Zafar et al. (2024), the following recommendations are proposed. CPEC in Balochistan should be made more inclusive through dedicated information cells in universities and local institutions to improve engagement and reduce mistrust. SEZs should be relocated near mining areas like Chaghi and Khuzdar, with tax incentives and focus on value addition and local employment. Priority must be given to HRD, CBAs for local benefits, and stronger transparency mechanisms to ensure accountability and trust in CPEC projects.

This study is limited by reliance on fieldwork conducted in 2016–2017, reflecting earlier conditions, and by an all-male sample that excludes women's perspectives, which Bashir Baloch (2025) highlights as underrepresented in CPEC research. Access constraints in Balochistan further limited engagement with local communities. Future research should focus on longitudinal impacts of CPEC in mining areas like Reko Diq, alongside gendered analyses, spatial optimisation of SEZ locations, and comparative studies with mining economies such as Chile and Botswana.

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