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Building Pakistan's Fuel-Supply Resilience Against External Shocks

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Executive Summary

The disruption in the Strait of Hormuz in early 2026 exposed the vulnerability of Pakistan's fuel supply chain. Pakistan heavily relies on imported crude oil, petroleum products, and LNG, with majority of this supply volume concentrated around Gulf producers, and relying on maritime routes that are vulnerable to geopolitical disruption. Between July and March FY2026, Pakistan imported approximately 13.9 million metric tons of crude oil and petroleum products at a cost of approximately $8.9 billion; imports account for approximately 25% of crude-oil requirements, 30% of diesel, and nearly 70% of petrol, while Qatar and the UAE supply all of Pakistan's LNG imports. In the course of these crises, the crude-oil inventory of Pakistan roughly fell to only 11 days, requiring emergency supply arrangements via Saudi Arabia's Yanbu port, increased stock management, and special import financing needs.

This Policy Viewpoint, therefore, recommends that instead of crisis-driven solutions, Pakistan should adopt a permanent fuel-supply resilience centered on four mutually reinforcing approaches. First, develop a phased Strategic Petroleum Reserve, beginning with a credible emergency buffer and progressively adding required commercial and refinery reserves. Second, establish diversification across suppliers, contracts, cargo terminals, shipping routes, and payment methods before a disruption occurs. Third, improve refinery crude-slate flexibility and petroleum logistics to ensure that alternative sources can be processed, stored, and supplied essentially. Fourth, design and implement a centralized fuel-supply emergency framework which includes real-time monitoring, predetermined escalation mechanisms, contingency fund, and inter-departmental coordination. These measures, together, will provide Pakistan with time, alternatives, local flexibility, and institutional readiness. The objective is to efficiently manage external energy reliance more resiliently, so that any disruption, in a particular supply route, does not translate into domestic fuel shortages and macroeconomic instability.

1. The Policy Problem

Pakistan's fuel security dilemma is not grounded alone in the imports. It is instead combination of foreign dependency, limited supply routes, insufficient stock capacities, and absence of institutional contingency plans.

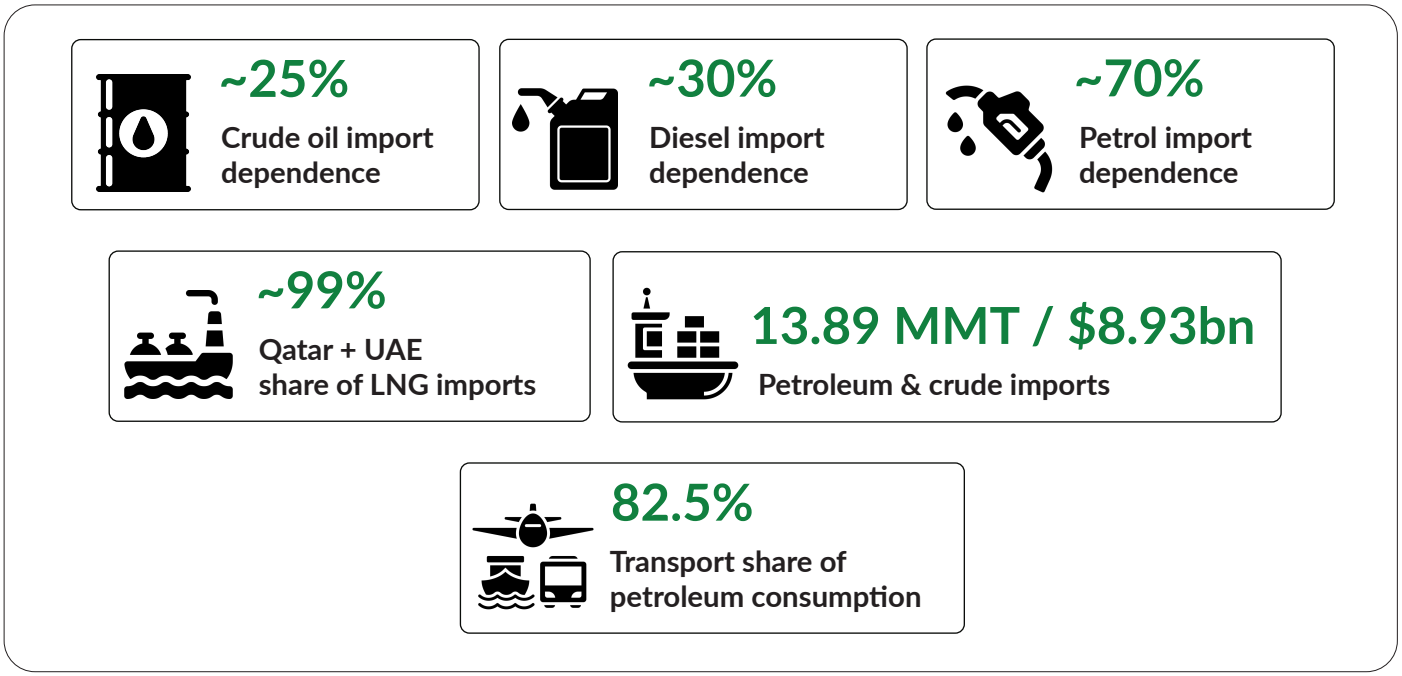
In addition, the exposure risk also varies significantly amongst petroleum products. In March 2026, the Petroleum Division informed the Senate Standing Committee that Pakistan imports around 25% of its crude oil requirements, 30% of its diesel, and roughly 70% of its gasoline. All these supplies primarily passing through

the Persian Gulf and the Strait of Hormuz. The committee was also briefed that Pakistan held approximately 392,000 tonnes of crude oil, 404,000 tonnes of diesel and 564,000 tonnes of petrol at the time[1].

Economic vulnerability is also evident in the country. Pakistan consumed roughly 13.64 million metric tons of petroleum products from July to March FY2026. The major chunk of around 82% has been consumed by the transport sector accounting for around 11.25 million tons, while the petroleum imports totaled around 13.89 million tons and cost nearly $8.93 billion during same period[2]. As a result, fuel supply interruptions have a rapid impact on freight charges, agricultural logistics, passenger mobility, and pricing across the economy.

Following petroleum products, LNG acts is another layer of fuel concentration. According to Kpler, Qatar and the UAE jointly account for nearly 99% of Pakistan's LNG supplies[3]. This becomes more concerning since around 93% of Qatar's and 96% of the UAE's LNG exports generally pass Hormuz, and there is no comparable physical bypass route capable of redirecting such a volume of LNG to global markets.

Figure 1. Pakistan's Exposure to Imported Fuels and Concentrated Supply



Source: Senate of Pakistan, Secretary Petroleum Division briefing to the Senate Standing Committee on Petroleum, 2026; Pakistan Economic Survey 2025-26; Kpler (2026)

Pakistan's economy heavily depends on continuous fuel supply, while its fuel-security framework has been designed predominantly for regular commercial conditions. As such, the Hormuz crisis revealed a structural challenge. The insufficient commercial stockpiles, long-term import contracts, and established Gulf supply links and international shipping operations caused sever energy crises. They offer significantly low protection when a geopolitical shock impacts physical availability, freight, insurance, financing, and procurement lead times all at once.

Therefore, underlying policy objective should be beyond securing energy resources and should be focused on resilient interdependence, with sufficient buffers, alternative supply options, domestic flexibility, and institutional capacity to absorb external shocks before it leads to domestic scarcity and macroeconomic instability.

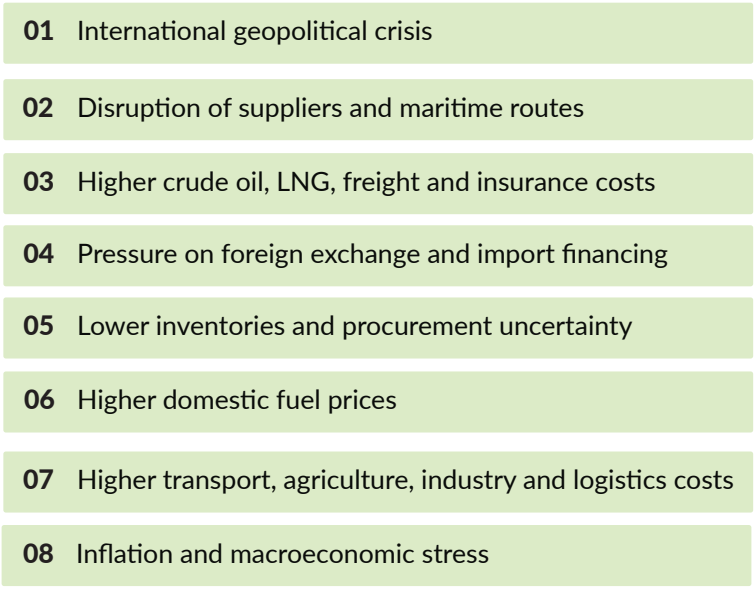
2. External Shock Transmission

An external fuel shock hits Pakistan through a several interrelated channels. A geopolitical crisis may initially disrupt traditional suppliers, shipping routes, or significant maritime chokepoints. Even where physical cargoes are still accessible, increased security threats may increase international oil and LNG prices, tanker freight charges, and war-risk insurance premiums. For an importing economy, these increases immediately increase

1.Senate of Pakistan, Secretary Petroleum Division briefing to the Senate Standing Committee on Petroleum (2026).
2.Pakistan Economic Survey (2025-26)
3.Kpler (2026)

foreign exchange demand and the value of individual import transactions. Banking limits, letters of credit, and supplier-credit arrangements may thus form part of the energy security dilemma. During the 2026 crisis, Pakistan had to change its banking procedures in order to allow imports of crude oil, petroleum products, and LNG.

Figure 2. External Shock Transmission Mechanism



Source: Author's illustration based on Pakistan Economic Survey 2025-26 and State Bank of Pakistan (2026)

If replacement cargoes are delayed, local inventories begin to decrease, while procurement uncertainty increases. Subsequent pressure then passes to the downstream, causing higher gasoline, diesel, and other fuel prices. Since petroleum is used in transportation, agriculture, industry, and logistics, price hikes also impact the food prices as a result of production costs, and overall inflation. The supply-chain mechanism of fuel supplies implies that resilience cannot be based on a single action. Strategic fuel supplies alone cannot withstand prolonged disruption; even the alternate supplies become insufficient if cargoes cannot be financed or processed; and infrastructure offers little protection in the absence of institutions capable of coordinating an emergency response.

3. Fuel-Supply Resilience Gaps

Gap 1: Limited Strategic Buffer

Pakistan maintain commercial petroleum inventory equivalent to 20 days by Oil Marketing Companies (OMCs), as per requirement OGRA, to meet domestic sales. These reserves ensure market continuity, but they are not equivalent to the sovereign Strategic Petroleum Reserve designated for exceptional conditions. However, the Hormuz disruption of March 2026 caused the crude oil reserves to fall for only 11 days despite a greater diesel buffer[4]. This has exposed the institutional weakness where Pakistan lacks an adequately developed supplementary layer of sovereign emergency reserves that can be released in as per national security requirements.

Gap 2: Concentrated Suppliers and Maritime Supply Routes

Pakistan has longstanding relations with Gulf state which facilitate advantageous access to energy resources of region. However, the resources are geographically concentrated and given Hormuz situation has become volatile. The Hormuz route accounted roughly one-quarter of global seaborne oil transit and in 2025 alone about 20 million barrels of crude oil passed per day The available capacity to bypass the strait via Saudi and UAE crude pipeline is estimated to be between 3.5 and 5.5 million barrels per day[5]. The existing crisis, however, exposed this route as most vulnerable leading to considering Yanbu and Fujairah as alternative routes to add redundancy but evidently cannot replace regular Hormuz shipments which is centered around major energy resources. NG is significantly less flexible because Qatar has no equivalent bypass route.

4.The Cabinet Committee to Monitor Petrol Prices meeting held on 16 March 2026.
5.Strait of Hormuz, International Energy Agency (2026)

Gap 3: Limited Refining and Fuel-Logistics Flexibility

Domestic refining may reduce reliance on imported finished petroleum products, however refining itself is still dependent on crude supply. Resilience thus depends not only on increasing capacity, but also on ensuring that refineries can process a wide range of technically compatible crude oils and that ports, storage facilities, pipelines, and inland distribution networks can adapt to shifting supply patterns.

Gap 4: Reactive Crisis Preparedness

Pakistan showed significant crisis management capacity in 2026. High-level committees monitored stocks, cargoes, prices, and distribution; OGRA improved supply monitoring; Saudi Arabia was approached for Yanbu supplies; and the SBP changed import-financing procedures. The challenge is that several of these systems were more active after the disturbance occurred. The immediate policy goal is to transform emergency readiness into permanent contingency planning.

Table 1. Resilience Gap and Policy Response

Resilience gap	What the 2026 crisis exposed	Policy response
Limited strategic buffer	Crude stocks fell to around 11days	R1. Strategic Petroleum Reserve
Supplier and route concentration	Heavy Gulf/Hormuz exposure; Yanbu activated during crisis	R2. Supply & route diversification
Refining and logistics rigidity	Alternative supplies still require compatible refineries, ports and pipelines	R3. Refining & logistics flexibility
Reactive crisis management	Monitoring, financing and coordination intensified after disruption began	R4. Institutionalized Crisis preparedness

Source: Author's synthesis based on the analysis presented in this Policy Viewpoint

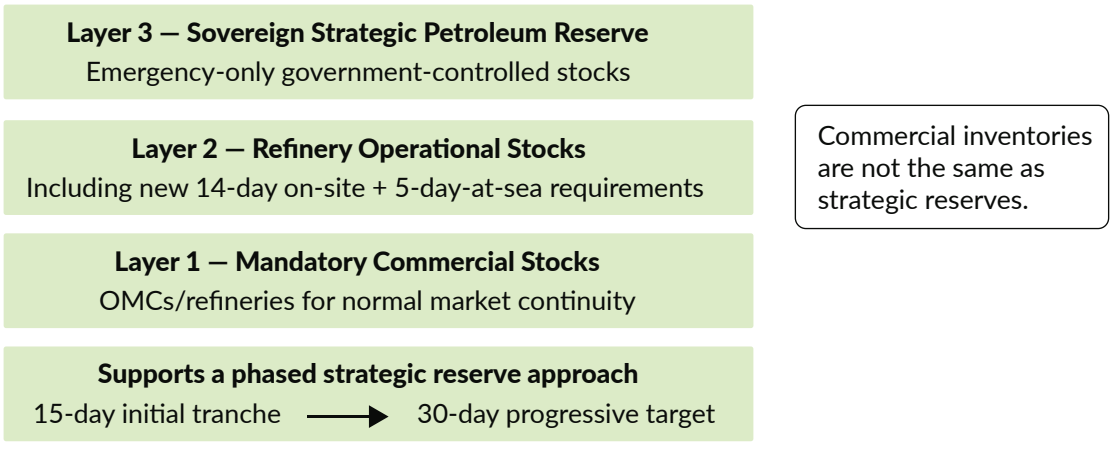
These four gaps provide the basis for the policy recommendations developed in the following section.

4. Policy Recommendations

R1. Build a Phased National Petroleum Stockholding System

Pakistan should develop a multi-layered national petroleum stockholding architecture instead of treating commercial inventories and strategic reserves alike. The first layer should be mandatory commercial stocks maintained by OMCs and refineries for normal market continuity; the second operational layer should be refinery feedstock inventories; and the third which is currently underdeveloped layer should be a state-controlled ring-fenced Strategic Petroleum Reserve for exceptional external disruptions.

Figure 3. Proposed Multi-Layer Petroleum Stockholding Architecture for Pakistan



Source: Author's proposed framework

Pakistan should refrain from simply adopting the IEA referenced 90-day oil reserve benchmark without its own situation and consideration[6]. As evidenced, various countries achieve this commitment in different manners, including government stocks, specialized agencies, and industry- mandated inventories. In March 2026, while the Hormuz crisis erupted, IEA members had more than 1.2 billion barrels in relevant states emergency reserves. These were further supplemented by approximately 600 million barrels of industrial inventories maintained under regulatory obligation. As the Hormuz flow disrupted, member states agreed to make 400 million barrels available from these reserves which was the largest coordinated release in IEA history[7]. A relevant regional example is India, which has a dedicated Strategic Petroleum Reserve (SPR) capacity of 5.33 million metric tonnes, sufficient to cover about 9.5 days of crude oil needs, while oil companies hold considerably larger commercial reserves[8]. It is, therefore, evident that sovereign reserves build fuel supply resilience and can deliver effectively during disruptions. Pakistan although may not aim straightforward a 90-day stockpile as per IEA guidelines, instead aim to gradually increase its strategic reserve capacity equivalent to around 15 days of essential petroleum needs in addition to storage maintained by industry and refineries. After establishing and testing 15-day storage, governance, rotation, and drawdown systems, the sovereign reserve could eventually be increased to about 30 days, depending on fiscal capacity and regular security evaluations.

The proposed reserve system should include a risk-adjusted combination of crude oil and essential refined products instead of just crude oil alone. While crude oil is vital for maintaining refinery operations, it is effective only if refineries and logistics systems are functioning. The objective should be to make available petrol and high-speed diesel more swiftly to the market during disruptions in the global supply chain. An effective institutional and governance framework needs to define ownership, storage sites, process for independent stock verification, authority for release, conditions for drawdown, principles for allocation, and rules for replenishment. Most importantly the strategic reserves should not be used for regular releases to control typical fluctuations in fuel prices.

Financing is key challenge to develop strategic storage. It should essentially differentiate the infrastructure for storage and the initial purchase of reserve. The possible financing routes include public funding, privately structured commercial partnerships, or government-to-government agreements where they add value. In the meantime, petroleum acquisitions can be accumulated over time rather than being financed all at once in a fiscal year. The goal should not be develop huge stockpile, instead establish a reliable sovereign buffer that allows sufficient time to initiate alternative supply options before an external disruption turns into a domestic crisis.

R2. Diversify Supplier, Contract and Maritime Route

Although the strategic reserves offer a buffer during crises they cannot substitute for long-term access to global supplies. Pakistan, therefore, should shift from emergency rerouting to a proactive strategy of diversifying suppliers, loading terminals, contracts, shipping logistics, and payment systems. The Hormuz disruption has significantly highlighted this need. As such, as these disruptions emerged, Pakistan formally reached out to Saudi Arabi regarding the procurement of crude oil via Yanbu on the Red Sea[9]. Following Saudi confirm, and support required arrangements were made a Pakistani Vessel collected the crude from there.

Yanbu offers a true alternative in supply as Saudi Arabia's East–West Pipeline ensure crude exports from the Eastern Province to the Red Sea, circumventing the Strait of Hormuz. In similar manner, the UAE's Habshan–Fujairah pipeline also serves as a backup route to the Gulf of Oman. However, these alternative pathways have significant capacity constraints, as pointed out by the IEA and demonstrated in Figure 4, when compared to typical flows through Hormuz. These alternatives, although mitigate dependence on a single route but cannot entirely replicate the scale and adaptability offered by the current maritime route.

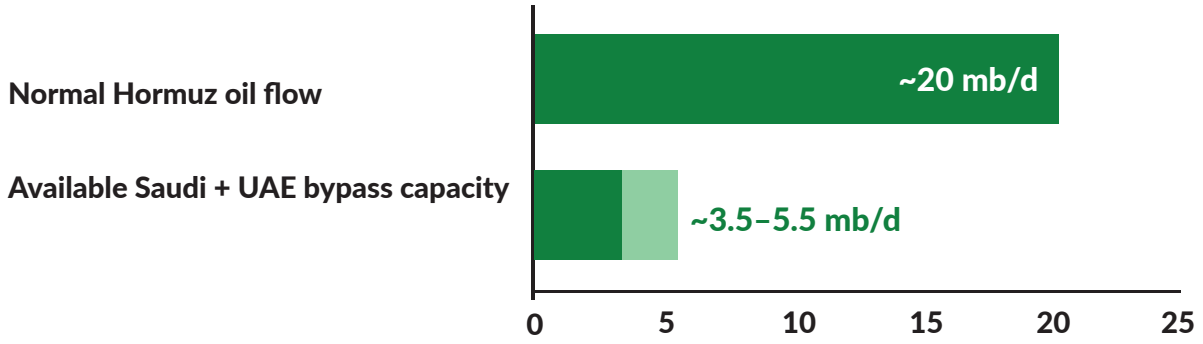
6.Strait of Hormuz, International Energy Agency (2026)

7.IEA member countries to carry out largest ever oil stock release amid market disruptions from Middle East conflict. International Energy Agency (2026, March 11).

8.Press Information Bureau, Government of India. (2021, February 3). Strategic crude oil reserves. Ministry of Petroleum and Natural Gas.

9.Ministry of Energy, Petroleum Division. (2026, March 4). Pakistan requests alternative supply route via Yanbu, Saudi Arabia assures full support. Government of Pakistan.

Figure 4. Hormuz Dependence vs Available Bypass Capacity



Alternative routes provide redundancy, not replacement.

Note: Qatari LNG has no equivalent physical bypass around the Strait of Hormuz.

Source: Strait of Hormuz, International Energy Agency (2026)

Even the range and extent of Gulf crises highlight the shortcomings of depending solely on alternative corridors. Saudi Arabia's East–West Pipeline, a critical strategic asset intended to circumvent Hormuz, experienced a temporary disruption after attacks in September 2026. Although the event did not diminish the importance of bypass infrastructure, it underscored that alternative paths are still vulnerable to broader regional security threats. The key policy takeaway from these events for Pakistan necessitate to develop supply resilience by avoiding one route or single alternative. A multifaceted strategy is needed that integrates diversified supply routes, strategic oil reserves, flexible domestic facilities, and institutional readiness.

The diversification, as such, should take place across multiple levels. It should be commenced by Pakistan State Oil (PSO) and relevant refineries. The other importers should also be required to assess technically suitable alternatives, including non-Gulf options and consider different crude grades where economically feasible. Second, the contract with Gulf supplier should be reviewed, where possible, to include alternative loading terminals such as Yanbu and Fujairah. Third, the long-term agreements or variations to the agreement must outline emergency volume, pricing, and scheduling guidelines in advance to ensure negotiations do not commence from scratch during a disruption. Fourth, shipping and finance should be essentially considered as elements of the supply chain. As evidenced during the Hormuz disruptions and the Senate was formally informed that potential Russian procurement confronted banking limitations and a procurement timeline of 35 to 40 days[10]. It shows that another source is ineffective as a backup unless banking, logistics, insurance, and contractual arrangements remain unresolved.

LNG strategy needs an alternative to be considered sooner or later. Qatar and the UAE represent nearly all of Pakistan's LNG imports with over 110 bcm of LNG transited through Hormuz in 2025[11]. However, this challenge is deeply rooted in the fact highlighted by IEA that there are no other pathways capable of delivering these Gulf LNG volumes to Pakistan and the global markets. As such, LNG resilience must emphasize contractual flexibility: a geographically diversified supplier base, availability of spot and short-term shipments as the demand rises, provisions for cargo rescheduling and substitution. In addition, sufficient credit lines, and enhanced destination flexibility must be explored in upcoming contract discussions.

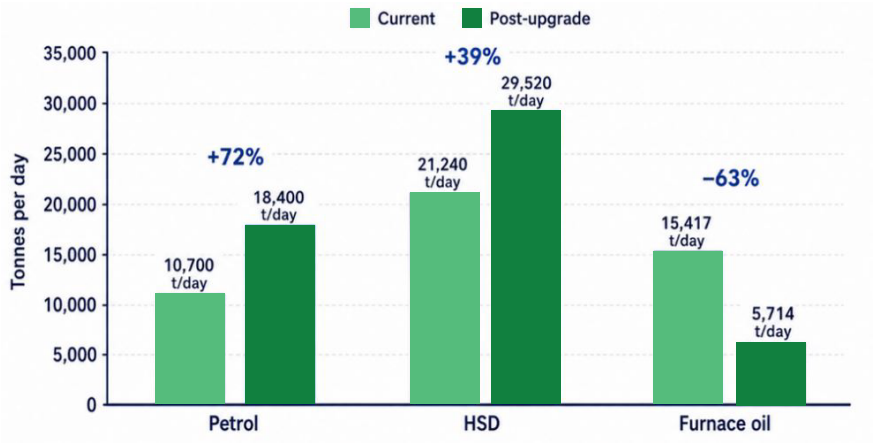
The Petroleum Division, therefore, should formalize these actions by conducting an annual Fuel Import Concentration and Chokepoint Risk Assessment. These analyses shall provide each supplier with shares, route exposure, procurement lead times, refinery compatibility, contract flexibility, and payment methods. Geographic closeness and existing trade relations ensure the Gulf remains central to its fuel supply; therefore, Pakistan should not give up on Gulf energy. Instead, the goal should be to ensure that no individual supplier-route-contract arrangement becomes irreplaceable during the timeframe accounted for by Pakistan's existing stock levels.

10.Senate of Pakistan, Secretary Petroleum Division briefing to the Senate Standing Committee on Petroleum (2026).
11.The Middle East and Global Energy Markets, International Energy Agency (2026)

R3. Strengthen Domestic Refining and Fuel-Logistics Flexibility

The third resilience layer of Pakistan is essentially indigenous: the capacity of refineries, ports, storage centers, and distribution systems to adjust when conventional imports are disrupted. The July 2026 changes made by the government to the Brownfield Refining Policy 2023 present an opportunity to explore. The revised framework targets to mobilise approximately $6 billion for advancement/upgradation of Pakistan's five operational refineries. With the anticipated product lineup following the upgrade, petrol output is expected to rise from 10,700 to 18,400 tonnes daily, an increase of approximately 72%, and HSD output from 21,240 to 29,520 tonnes per day, around 39%. While, the furnace-oil output is projected to decrease by around 63%, reducing from 15,417 to 5,714 tonnes each day[12].

Figure 5. Expected Change in Pakistan's Refinery Product Slate under Brownfield Upgrades



Refinery modernisation can reduce dependence on imported finished fuels, but resilience also requires broader crude-slate flexibility.

Source: Author's illustration based on July 2026 amendments to the Brownfield Refining Policy 2023

The refinery modernization shall significantly enhance the alignment of local refinery production with the goods that Pakistan actually consumes and imports. However, this in any case cannot be treated as energy independence. Reduced imports of the final products such as petrol and diesel may just shift external reliance of these products to enhanced import of crude oil. Energy resilience following these measures, therefore, shall be decreased reliance on finished-product imports while making crude dependency more diverse and controllable.

Considering enhanced import volume of crude, the flexibility of crude slate should be instituted as an explicit criterion in refinery Upgrade arrangements. Every participating refinery must determine the spectrum of crude grades it can presently refine, other grades that may become technically feasible post-upgrade, and the changes needed to expand its sourcing opportunities accordingly. It is pertinent to noted that PARCO's Mid-Country Refinery, with a capacity of 120,000 barrels daily, already handles a variety of crude types, such as Arabian Light, Upper Zakum, Murban, Das, and local sources[13]. This highlights the significance of having a diverse feedstock capability of other refineries as well.

The revised policy also aids supporting the operational inventories. The upgraded refineries, subsequently, must keep crude inventories that match 14 days of their nameplate capacity on the premises. The refineries reliant on imports need to maintain an additional five days of crude stored offshore[14]. These reserves are anticipated to act as the refinery-operational layer within the overall framework suggested under R1, rather than substitutes for sovereign reserves.

Pakistan eventually needs a National Petroleum Logistics Resilience Audit that encompasses the entire chain from offshore unloading and ports to refineries, storage facilities, pipelines, inland depots, and final distribution. The audit should essentially identify genuine capacity instead of nominal metrics, key vulnerabilities, alternative receiving locations, critical pipeline chokepoints, and the capability to redirect fuel following any major facility disruption. Investment should also focus on mitigating specific vulnerabilities rather than broadly enhancing infrastructure.

12.Kiani, K. (2026, July 28). Govt finally revamps oil refining policy; what does it mean? Dawn
13.Pak-Arab Refinery Limited, Project Details, Technological solutions for factories and plants.
14.Kiani, K. (2026, July 28). Govt finally revamps oil refining policy; what does it mean? Dawn

R4. Institutionalizing Fuel-Supply Emergency Preparedness and Financing

The 2026 Gulf crisis revealed that Pakistan can manage and coordinate external fuel emergency efficiently if it is taken as a national priority. The subsequent step is to learn and adapt from this experience and ensure that this management and coordination do not need to be re-established in every crisis. The government implemented rigorous oversight of oil inventories, shipment activities, pricing, refining processes, and local distribution amid the disruption. This oversight was led by senior-level committee headed by the finance minister and situation was analyzed on a daily basis, and OGRA was instructed to keep track of stocks and prices.

Learning from this experience, Pakistan should develop and establish a firm National Fuel Supply Resilience Mechanism, with the Petroleum Division acting as the technical secretariat with of involvement Finance, SBP, Foreign Affairs, Maritime Affairs, OGRA, PSO, Pakistan LNG Limited, refineries, OMCs, port authorities, and pipeline operators as required. A National Fuel Security Dashboard should serve as an operational basis. Instead of building a new information system from scratch, the government should unify and formalize the digital monitoring capabilities that were enhanced during the crisis. The dashboard should combine physically available inventories, shipments in transit, refinery operations, port and pipeline access, LNG schedules, global pricing, freight and insurance terms, and projected foreign-exchange requirements.

The implementation and monitoring must be connected to established escalation guidelines. A four-tier protocol could differentiate between Normal Conditions, Heightened External Risk, Significant Supply Disruption, and National Fuel Emergency. Each level should automatically initiate robust actions—from verifying inventory and contacting suppliers to enacting contingency agreements, emergency procurement, and at the highest level, releasing strategic reserves.

Financing should be an integral component of the same structure. The 2026 crisis revealed that even with available cargoes, higher prices and premiums can drive transaction values beyond normal banking arrangements. On April 23, 2026, SBP specifically eased regulations to aid financial instruments for importing crude oil and petroleum products and allowed Standby Letters of Credit for crude, petroleum products, and LNG[15]. The Ministry of Finance, SBP, and Petroleum Division should consider establishing a permanent Emergency Fuel Import Financing Protocol. This protocol should include temporary increases of LC limits, consortium financing, SBLCs, supplier credit, deferred payment plans, and quick foreign exchange prioritization for the fuel imports.

Finally, readiness must be evaluated instead of presumed. Pakistan needs to perform a yearly Fuel Supply Resilience Exercise that includes the government and key industry stakeholder. Scenarios could involve an extended closure of Hormuz, cancellation of LNG shipments, the shutdown of major refineries or ports, or simultaneous rises in oil prices, shipping rates, and currency requirements. The objective is clear: Pakistan needs to transition from ad-hoc coordination to developed post-disruption framework where responsibilities, information, funding, and decision-making authorities are defined instead awaiting emergence of such crises.

5. Implementation Matrix

The implementation matrix integrates the four policy priorities discussed above into sequential actions, identifying important interventions, implementation horizons, and responsible institutions to ensure Pakistan's fuel supply resilience against external shocks.

15.State Bank of Pakistan. (2026, April 23). EPD Circular Letter No. 09 of 2026. Amendments in Instructions regarding 'Imports under Pakistan Single Window (PSW)-Financial Instrument Details' and 'Guarantees on behalf of Residents of Pakistan in favor of Non-Residents'

Table 2. Implementation Matrix

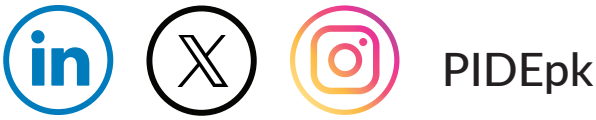
Priority	0–1 year	1–3 years	3–5 years	Lead institutions
R1. Strategic fuel buffer	Finalize SPR governance; verify mandatory commercial stocks; determine reserve composition and sites	Build initial strategic tranche and storage	Progressively expand toward ~30 days, subject to fiscal capacity	Petroleum Division, OGRA, Ministry of Finance
R2. Supply diversification	Conduct supplier/chokepoint risk assessment; map compatible crude alternatives	Negotiate contingency supply, terminal and financing arrangements	Periodically test alternative supply chains	Petroleum Division, MoFA, PSO/PLL, refineries
R3. Refining and logistics	Execute upgrade agreements; incorporate crude flexibility; conduct logistics resilience audit	Implement refinery upgrades and remove priority bottlenecks	Commission major upgrades and stress-test logistics network	Petroleum Division, OGRA, refineries, operators
R4. Crisis preparedness	Formalize coordination mechanism and dashboard; define alert levels	Operationalize emergency financing and stock-release protocols	Conduct annual stress tests and after-action reviews	Petroleum Division, Ministry of Finance, SBP, OGRA

Source: Author's formulation based on the four policy recommendations

6. Conclusion

The 2026 Strait of Hormuz disruptions did not land Pakistan into extreme fuel-security vulnerabilities; instead, it exposed them. The insightful analyses reveal that concentrated external supply routes, constrained strategic buffers, inadequately adaptable refining and logistics, and crisis response mechanisms become evident only post-disruption and rendered the economy vulnerable to shocks originating well outside Pakistan's borders. In addition, these crises also helped to understand that to develop the fuel supply resilience Pakistan do not need to begin from scratch. The commercial stocks already provide an initial operational buffer, alternative sourcing via Yanbu has been effectively sought, and revised refining policy establishes a basis for significant downstream enhancement. The governmental arm showed sufficient maturity with rigorous oversight and unique import-financing arrangements activated under duress. Now, from here the need is for a policy to integrate these capabilities into a lasting resilience framework. A national strategic reserve must offer time; varied suppliers, and logistic routes. The subsequent arrangement should create alternatives; adaptable refineries and cargo transport to guarantee that supplies arrive in domestic markets to meet the demand. Organizational readiness must verify that these systems are triggered prior to a disruption turning into a shortage. Pakistan so far is unable to eradicate its reliance on global petroleum and LNG markets, and with no control over the timing of the next geopolitical energy crisis should, therefore, essentially developed proposed resilience framework. It has, nevertheless, proven its capability to manage the extent of the country's vulnerability when the crisis emerged. The success of future fuel-security policy should ultimately be assessed by one query: when the next external shock occurs, how long can Pakistan continue functioning before that disruption turns into a domestic crisis?

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