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Economic Corridor (Western Route)
Baseline Study of Socioeconomic Situation
of Zone of Influence

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EXECUTIVE SUMMARY

The China-Pakistan Economic Corridor (CPEC) has great potential to increase regional and economic integration between the two countries. More importantly, the corridor is expected to improve the socioeconomic condition of the Zone of Influence (ZOI)¹ districts of the corridor. This study focuses on the socioeconomic condition of the districts falling across the Western route of the corridor. The Zone of Influence districts taken for the study include Gwadar, Turbat, Khuzdar, Kalat, Quetta, Qilla Saifullah, Zhob, Dera Ismail Khan, Mianwali, and Attock. The socioeconomic variables included in the study are education, health, industry-wise employment, and assets. The study quantitatively compares the socioeconomic condition of the ZOI districts using descriptive statistics. The data has been taken from Pakistan Social and Living Standard Measurement (PSLM) for the year 2012-13.

This study finds significant variation in primary and middle school enrollment across the districts. The average distance to middle schools is greater in rural districts of Balochistan as compared to the rural districts of Punjab and KPK. This shows that average distance to schools could be one of the primary reasons behind low enrollment in underprivileged areas of the ZOI districts.

Our research highlights that accessibility of households to health units and other health facilities in terms of utilization of health units and Lady Health Worker Services (LHWS). According to the study, utilization of health units is higher in the rural districts of Balochistan when compared to rural districts of Punjab and Khyber Pakhtunkhwa. On the other hand, utilization of LHWS is higher in the rural districts of Punjab and Khyber Pakhtunkhwa as compared to that of Balochistan. This study also highlights five major sectors in terms of employment across the ZOI districts: agriculture, forestry, and fishing; retail trade; construction; manufacturing; and transportation and storage, in order of their employment share. Further classifying the agriculture sectors into sub-sectors/industries, the study finds that almost the entire employment share in the agriculture sector belongs to crop and animal production industry across the ZOI districts. Similarly the wearing apparel industry comprises the highest share of manufacturing sector employment across the ZOI

¹ Zone of Influence (ZOI) districts refers to the districts touched by the road network/highway.

districts while the civil engineering industry comprises the highest share of employment in the construction sector.

Finally, the study compares the ZOI districts in terms of the average market value of capital assets held by households. The results show that Quetta, Mianwali, and Attock have the highest average value of household assets on average while Gwadar, Turbat, and Qilla Saifullah have the lowest. The current socioeconomic conditions highlighted by the study can be used as a benchmark to analyze long term impact assessment of the socioeconomic conditions in these districts after the completion of the corridor.

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SECTION I: INTRODUCTION

1.1. Background of Study

The construction of corridors (network of roads) helps in improving the trade and economic connectivity of a region. It enhances regional economic and trade cooperation which contributes towards regional peace and stability. Several economic benefits can be derived from investments in economic corridors including growth in economic output, generational employment, and improvement in household welfare. Given the important role of corridors in economic and geographical integration, China and Pakistan signed the China-Pakistan Economic Corridor (CPEC) agreement which includes a \$46 billion investment in Pakistan out of which \$5.90 billion would be spent solely on the construction of a road from Gwadar in Pakistan to Kashgar in the Western Chinese province of Xinjiang².

Currently, China mainly relies on the shipping route of the Strait of Malacca to reach European markets. This route is 9912 miles long and takes around 45 days to reach Europe via the Middle East, costing almost \$18 million on a daily basis. Through the CPEC, the distance would be reduced by up to 3626 miles and it would take China only 10 days for its shipments to reach their destination thus saving almost \$2 billion every year³. In Pakistan's case the corridor will not only provide access to central Asian countries and Europe but will also re-route more than \$2 trillion of Chinese exports -- thus making Pakistan a transit economy. Apart from this, the functioning of Gwadar port will boost business activities in the region⁴. This will potentially improve the socioeconomic condition of the region particularly in the marginalized areas of both countries.

The road construction of the CPEC will be carried out in stages where three routes - Center, Eastern and Western – are proposed to be built, which will pass through different regions of Pakistan. These routes are highlighted in Figure 1.1. Among these routes, the Western route is considered more economically and politically viable as compared to the Central and Eastern routes. According

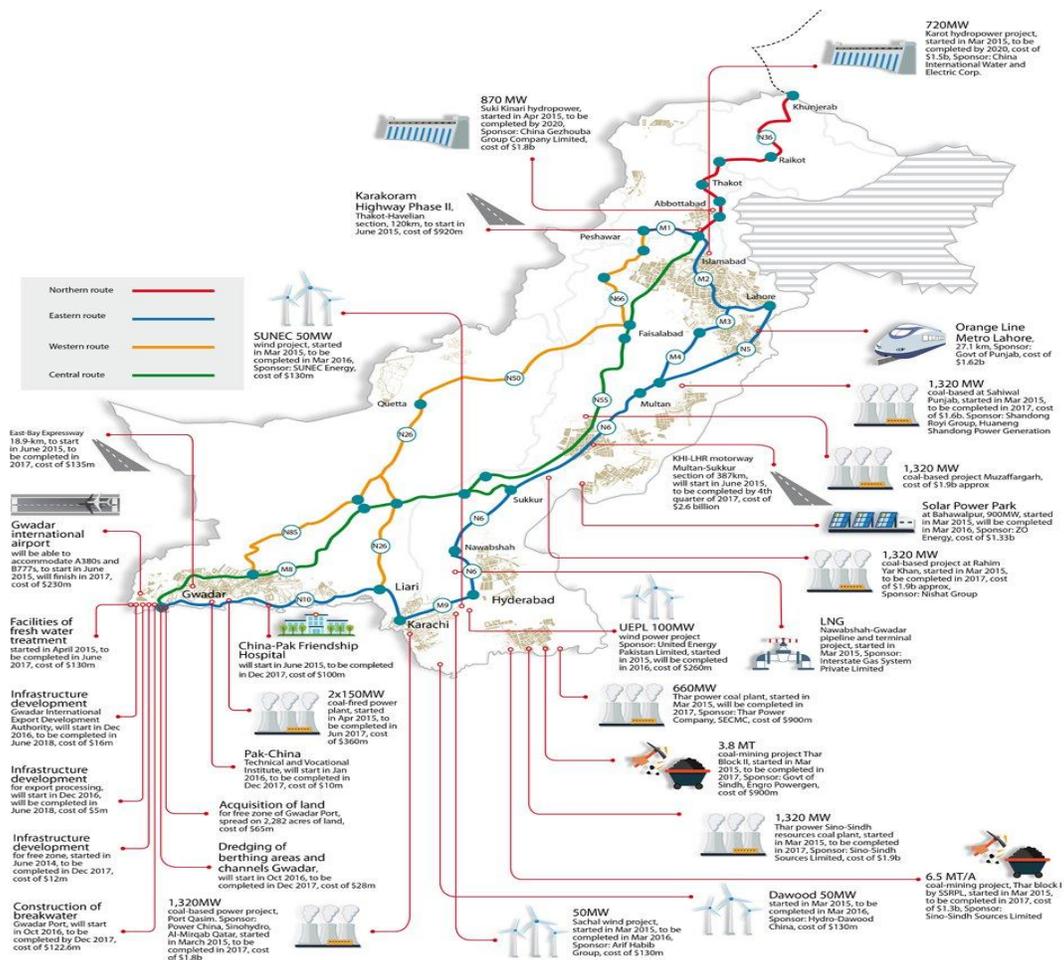
² Shah, S., & Page, J. (2015). China readies \$46 billion for Pakistan trade route. Wall Street Journal, 16.

³ "Pakistan-China Economic Corridor: a cost-benefit analysis" (The Express Tribune, 2015)

⁴ "CPEC to benefit entire region, say analysts" (Dawn News, 2015)

to a study on CPEC by the Chief Minister’s Policy Reform Unit, Government of Balochistan,⁵ the feasibility of the Western route is in terms of low cost of land acquisition and population dislocation compensation in the associated areas. The Western road would be passed from Gwadar-Turbat-Panjgur-Khuzdar-Kalat-Quetta-Zhob-Dera Ismail Khan-Bannu-Kohat-Peshawar-Hasanabdal-and onwards and will mostly cover least developed areas of Pakistan such as Balochistan and Khyber Pakhtunkhwa. This road will benefit Pakistan due to its social impact (health, education, environment, communication, etc.); economic impact (income, assets holding, accessibility to market, employment, production, etc.); and political impact mainly in the insurgency hit areas of Balochistan.

Figure 1.1. CPEC Routes



⁵ “China-Pakistan Economic Corridor: The Route Controversy” (2015)

1.2. Purpose of Study

This study highlights the socioeconomic situation of the districts across the Western route of the Zone of Influence (ZOI) surrounding the economic corridor. The socioeconomic indicators are education, health, assets and industry-wise employment. The study shows district wise socioeconomic comparisons to supply policy recommendations accordingly. The Zone of Influence districts in the Western route taken for the study include Gwadar, Turbat, Khuzdar⁶, Kalat, Quetta, Qilla Saifullah, Zhob, Dera Ismail Khan, Mianwali, and Attock. This baseline study would be helpful to understand the dynamics of the socioeconomic conditions of the ZOI as well as to comparatively evaluate the socioeconomic impact after the completion of the corridor.

1.3. Organization of the Report

Section II covers Data and Methodology. Section III covers State of Socioeconomic Indicators, which is based on the result of data analysis. Finally Section IV presents Conclusion and Policy Recommendations.

⁶ Although Khuzdar lies in the central route but its linkage between central and western routes makes it an important district to study.

SECTION II: DATA AND METHODOLOGY

2.1. DATA

To assess the socioeconomic condition of the ZOI districts, data of households as well as individuals has been used for the ZOI districts. The data has been extracted from Pakistan Social and Living Standards Measurement (PSLM) for the year 2012-13. The variables which reflect socioeconomic condition are taken such as education, health, employment, and assets possession. Table 2.1 describes the variables and indicators included in the study.

Table 2.1. Variables Description

Variable	Indicator	Sample Size
Education	<ul style="list-style-type: none"> • Enrollment in Primary school • Enrollment in Middle school • Distance to the nearest Primary/Middle schools 	12,174 children
Health	<ul style="list-style-type: none"> • Households' Visit to Health Care Unit • Household's utilization of Lady Health Worker service • Distance to the nearest Health units 	4808 households
Employment	<ul style="list-style-type: none"> • Industry and gender wise share of employed persons • Industry and District wise share of employed persons (For top 5 industries) • Industry and District wise share of employed persons (For sub-divisions of each of the top 5 industries) 	24,395 household members
Assets possession	<ul style="list-style-type: none"> • District wise capital assets possession by households in market value 	4808 households

2.2. Methodology

To conduct a quantitative analysis of the socioeconomic data, this study relies on descriptive statistics. The indicator for each variable is tabulated in terms of frequency distribution (percentage) across the ZOI districts. The tabulation is graphically presented to show district-wise comparison of socioeconomic indicators. The district wise result is also backed with province and region based comparisons to highlight the broader view of socioeconomic condition in the ZOI districts.

SECTION III: STATE OF SOCIO-ECONOMIC INDICATORS

The results are graphically presented by reporting District-wise percentage distribution for each indicator. This section explains the status of socioeconomic indicators across the ZOI districts.

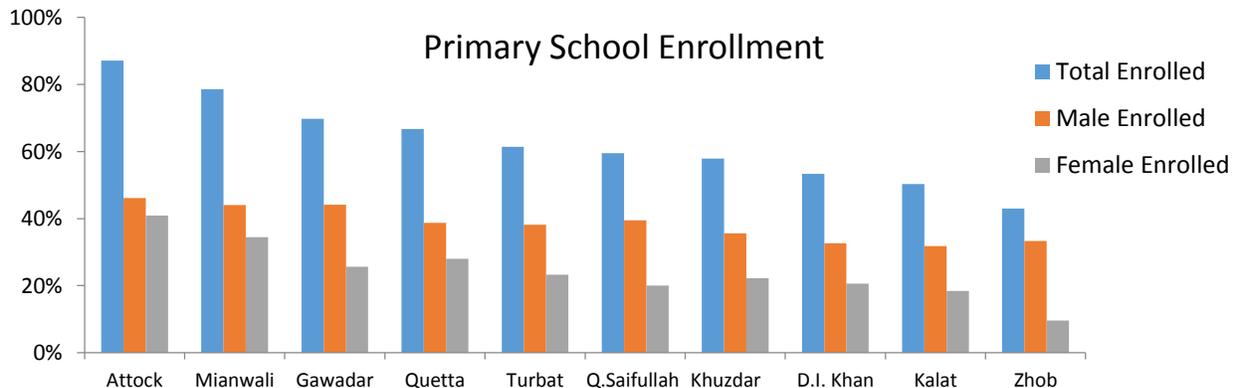
3.1. Education

Education is considered a key indicator of socioeconomic development, which also facilitates an individual's capacity development. Since Pakistan needs sound policies for capitalizing on its human resources and socioeconomic development mainly in rural areas, highlighting the current education situation in ZOI districts would help develop appropriate policy to facilitate more accessible and affordable education in these districts. To evaluate the current education situation, this report covers enrollment rates in primary and middle schools as well as distance to the nearest primary and middle schools for each district respectively. The CPEC would reduce travel time for the given distance, which increases access to schools mainly in terms of enrollment across all ZOI districts.

3.1.1. Primary School Enrollment

The primary school enrollment (in percentage) of the ZOI districts is shown in Figure 3.1. Attock and Mianwali rank highest in enrollment which is at more than 75 percent for the two districts while Zhob and Kalat rank lowest having less than 50 percent overall enrollment. However, female enrollment in all districts is below 50 percent with Zhob and Kalat having the lowest female enrollment rates of 9.6 and 18.5 percent respectively.

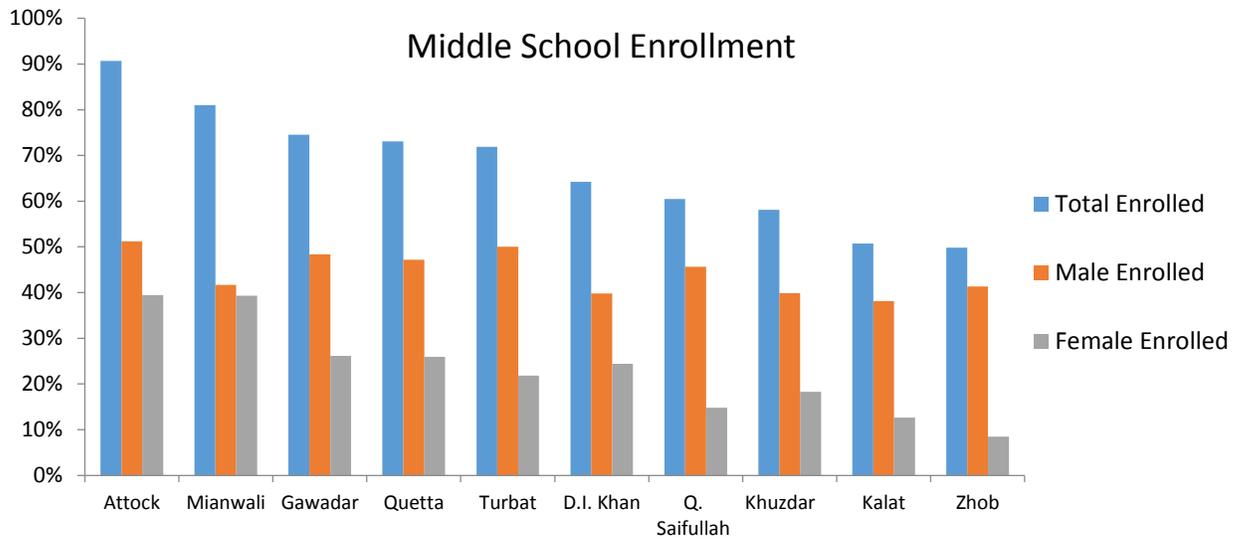
Figure 3.1. Primary School Enrollment



3.1.2. Middle School Enrollment

The middle school enrollment (in percentage) of ZOI districts is shown in Figure 3.2. Attock and Mianwali rank highest in enrollment, which is more than 80 percent while Zhob and Kalat rank the lowest having less than 50 percent in overall enrollment. However, the female enrollment in all districts is less than 40 percent with Zhob and Kalat have the lowest female enrollment of 8.5 and 12.6 respectively.

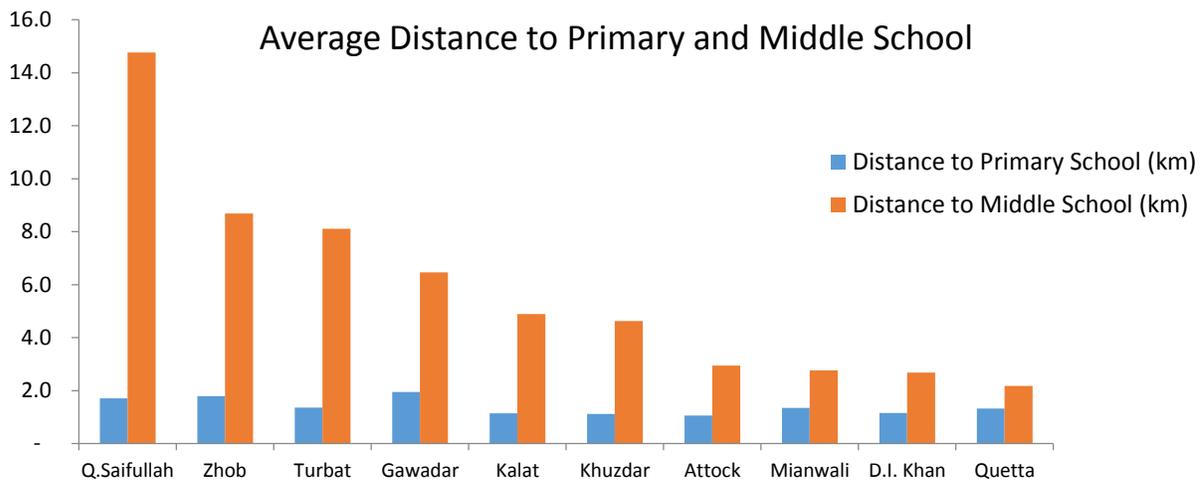
Figure 3.2. Middle School Enrollment



3.1.3. Average Distance to Primary and Middle Schools (in Kilometer)

Figure 3.3 shows average distance from households to primary and middle schools across ZOI districts. It indicates that the average distance to primary school is less than 2 km in all districts of ZOI while the average distance to middle schools goes as far as 14.8 km. Among these districts, Qilla Saifullah has the highest average distance to middle schools which is 14.8 km while Quetta has the lowest which is 2.2 km. It can also be seen that the average distance to middle schools is greater in rural districts of Balochistan as compared to the rural districts of Punjab and KPK.

Figure 3.3 Distance to Primary and Middle Schools (km)



Both demand and supply side factors affect school enrollment at the primary and middle education level. The demand side factors which can cause low enrollment in the ZOI districts include low income family, opportunity cost of educating children, parents' perceived return of education, and so on. The supply side factors may include lack of sufficient resources to fund education expenses, low priority of education sector from government, high recurrent expenditure as compared to the capital expenditure of education, limited accessibility of children to schools, etc. This report highlights that the average distance to middle schools can cause low enrollment in the middle schools mainly in the rural districts of Balochistan. This shows that distance to schools is one of the main factors behind low enrollment mainly in underprivileged areas.

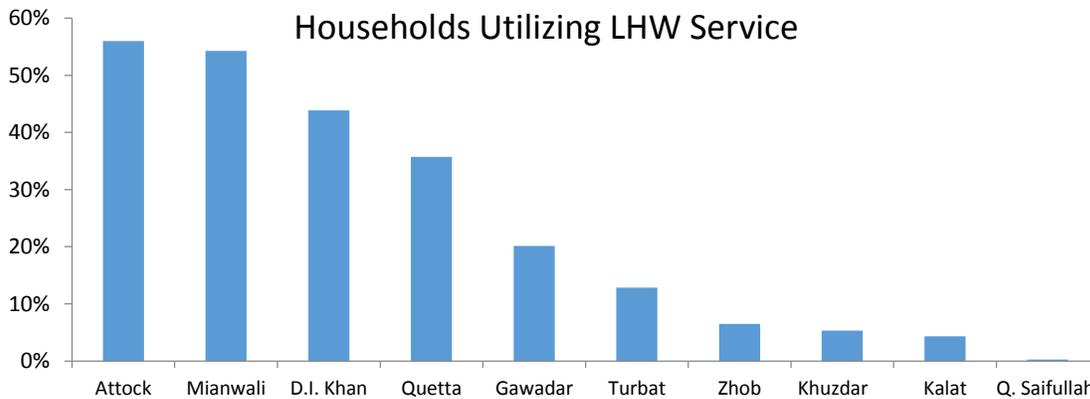
3.2. Health

Providing basic health facilities is the central part of a government's health policy, which also covers improving access of women to government health units particularly in rural areas. In Pakistan basic health services are provided not only by Health units (HU) but also through Lady Health Worker Services (LHWS). The CPEC would not only reduce travel time to health units but the resulting increase in other economic activities would also raise the standard of living, which in turn would positively influence healthcare utilization. Given the potential impact of the CPEC on accessibility to health services, this report highlights the current utilization of LHWS and Health units by households across the ZOI districts.

3.2.1. Households' Utilization of Lady Health Worker Services

Households' utilization of LHW service is a key component of public healthcare service delivery. Maternal health is considered one of the most serious problems in developing countries including Pakistan. The Government of Pakistan has trained a large number of Lady Health Workers to reduce maternal mortality. Lady Health Workers visit households in urban and rural areas to help women in different stages of pregnancy and aids women with regards to mother and child health care before and after delivery. In the context of our study, LHWS utilization varies among the ZOI districts because of different factors including social and cultural issues, accessibility to LHWS by households mainly in the rural districts of Balochistan, etc. According to Figure 3.4, Attock, Mianwali, and D.I. Khan are those districts with the highest utilization of the LHWS i.e. 56, 54.2 and 43.8 percent respectively. On the other hand, Qilla Saifullah, Kalat, and Khuzdar have the lowest utilization of LHWS, at 0.3, 4.3 and 5.3 percent respectively. Although the utilization in rural areas of Punjab and KPK is higher, overall LHWS utilization in all districts is less than 60 percent. This needs to be studied further to identify the main factors behind the low utilization in these districts.

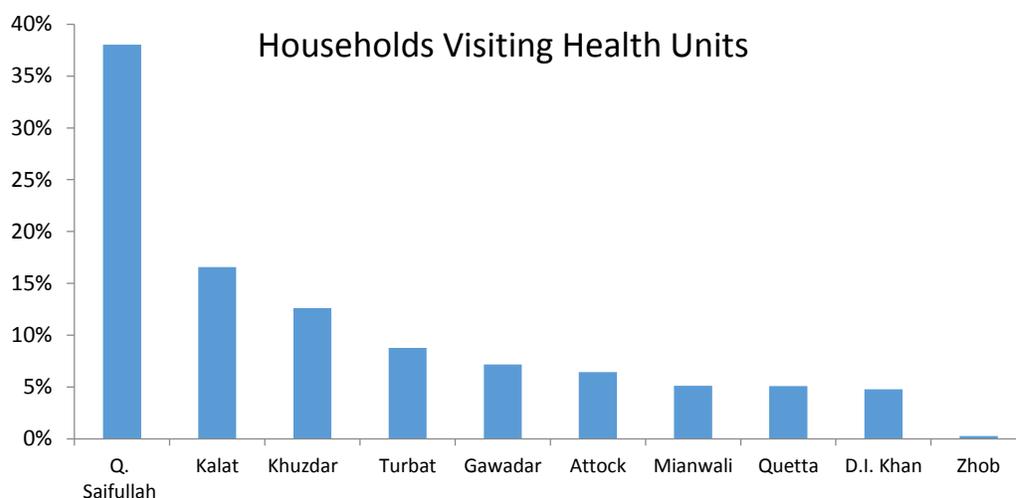
Figure 3.4 Percentage of Households utilizing Lady Health Worker (LHW) Service



3.2.2. Households' Visit to Health Units

Health Units comprise both Basic Health Units (BHU) and Rural Health Centers (RHC), which provide basic health facilities for treatments to ailments such as diarrhea etc. In Pakistan only 6 percent of households consult BHU or RHC for diarrhea which reflects the limited use of the government primary health network. However, Balochistan is the only province which received as much as 25 percent diarrhea consultation from government facilities⁷. Similar results are shown in Figure 3.5 according to which greater number of households visits health units in the rural districts of Balochistan as compared to the rural districts of Punjab and Khyber Pakhtunkhwa. Qilla Saifullah and Kalat have the highest percentage of households' visits to health units i.e. 38 and 16.6 percent respectively. However, Zhob, as opposed to the other districts of Balochistan, has the lowest percentage of households visiting health units which is 0.3 percent. This may be due to issues such as fewer number of health units, poor law and order situation, or limited accessibility of households to health units, which needs to be addressed.

Figure 3.5 Percentage of Households visiting Health Units



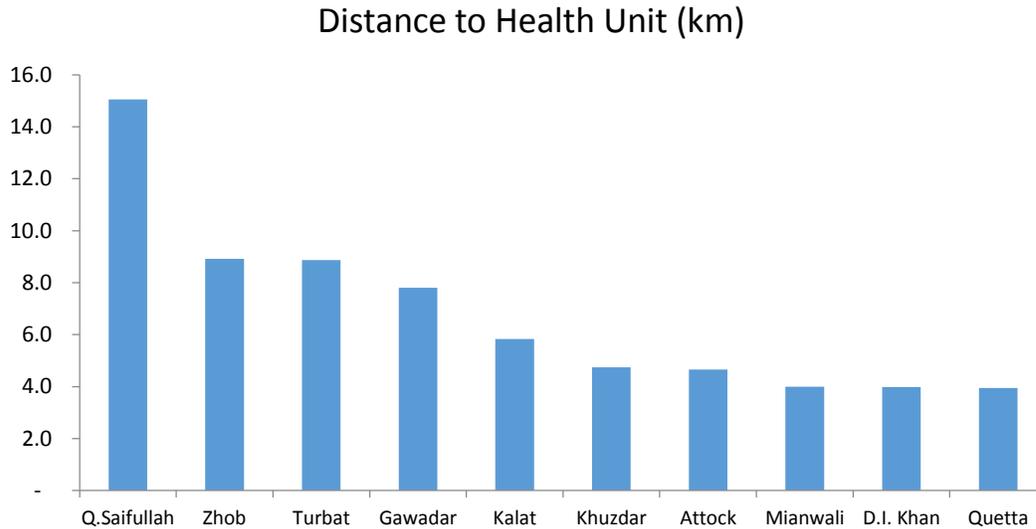
3.2.3. Average Distance to Health Units (in Kilometer)

Figure 3.6 shows average distance from households to health units across the ZOI districts. The rural districts of Balochistan such as Qilla Saifullah and Zhob have greater average distance to

⁷ Pakistan Social and Living Standard Measurement (PSLM)

health units, 15.1 and 8.9 kilometers respectively. On the other hand, rural districts of Punjab and KPK as well as Quetta, and urban area district of Balochistan, have smaller average distance to health units, which is less than 5 kilometer.

Figure 3.6 Distance to Health Units (km)



Low health care utilization is one of the main health sector issues faced by urban as well as rural ZOI districts. There are various factors behind underutilization of health care units such as non-functioning or partially functioning health units, limited budget to run health units, limited staff, no furniture, and/or limited accessibility to health care units mainly in rural areas of Pakistan. Similarly, the utilization of LHWS is also low in poor and marginalized districts of Pakistan. This may be due to various reasons such as job stress of LHWS (due to low socio-economic status, having long distance to travel, inconsistency in medical supplies, and inadequate stipend), lack of personal efficiency and quality service delivered by LHWS⁸. According to this study, the utilization of health care units is relatively higher in Balochistan as compared to other provinces. This may be due to low socioeconomic status of households in the province due to which most of the households can't afford private medical centers. The study also finds that utilization of LHW in rural districts is low in the districts with larger average distance to health units as compared to

⁸ Haq, Z., Iqbal, Z., & Rahman, A. (2008). Job Stress among Community Health Workers: A Multi-Method Study from Pakistan. *International journal of mental health systems*, 2, 15.

the ones with less distance. This implies that having long distance to health units may cause low utilization of LHWS mainly in the rural areas of Balochistan.

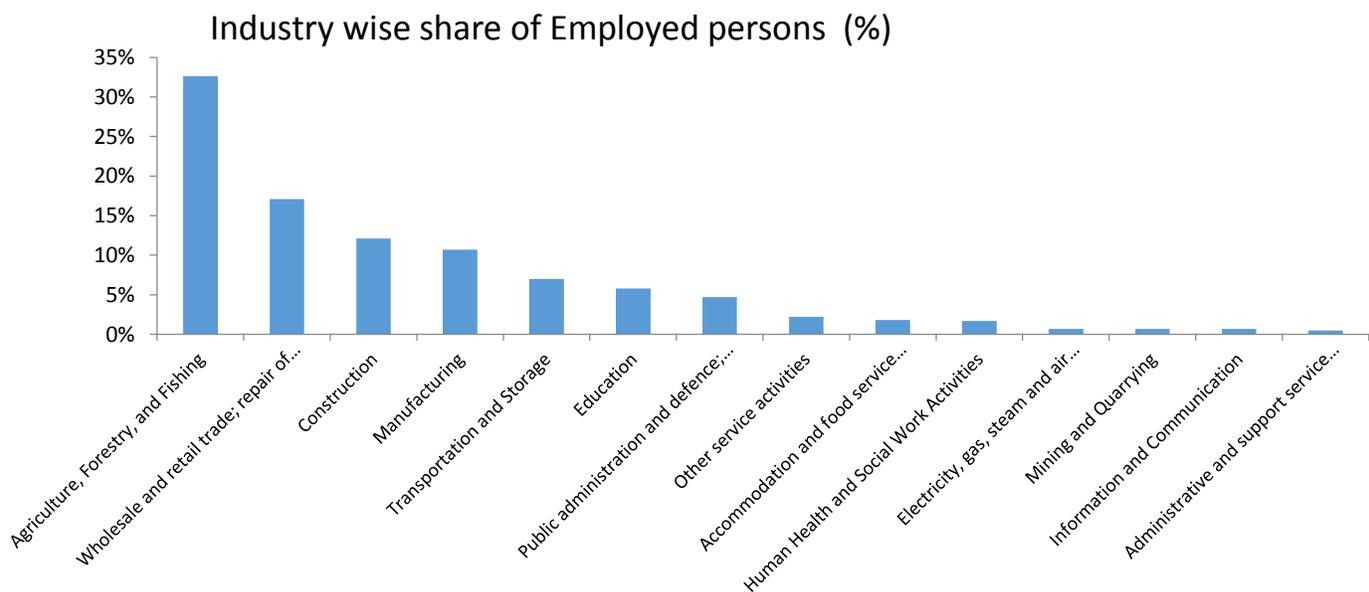
3.3. Sector-wise Employment

According to the Labor Force Survey 2013-14, Pakistan has a labor force of around 60 million strong, out of which 56.52 million people are employed. The agriculture sector dominates with 42.2 percent share of employment followed by wholesale and retail trade (14.7 percent), manufacturing (14.3 percent), construction (7.7 percent), and transport and communication (5.7 percent). The economic integration of different regions of Pakistan after the completion of the western route of the CPEC would enable modernized and efficient transportation and communication networks across these regions. The western route of CPEC would also establish rural-urban links and increase market accessibility which can create more employment opportunities in these regions.

3.3.1.1. Sector-wise Employment (in all ZOI Districts)

Figure 3.7 shows percentage distribution of employed persons across each ZOI district. The five major industries in terms of share of employed in all the districts are agriculture, forestry, and fishing; whole and retail trade; construction; manufacturing; and transportation and storage which have around 33, 17, 12, 11, and 7 percent share of employed persons respectively.

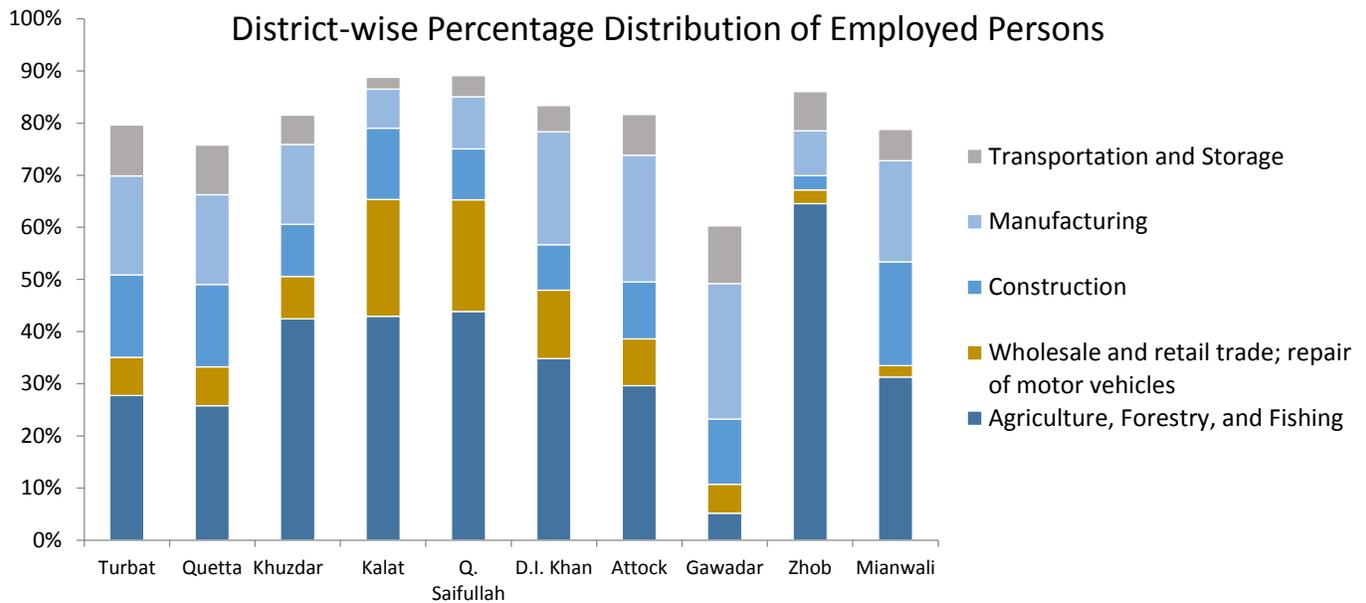
Figure 3.7 Industry wise share of Employed persons across ZOI Districts



3.3.1.2. District-wise Distribution of Employed Persons for Major Sectors

Figure 3.8 presents the distribution of employed persons in each of the top five sectors (in terms of employment share) for each district. The western route would pass mostly through rural areas in this region of Pakistan. In the rural areas most of the labor force is associated with the agriculture sector which is also reflected in this graph. Manufacturing, wholesale and retail trade, construction and transportation and storage are the sectors in which the highest percent of labor is employed. The current distribution of employed persons across districts can be used in determining re-allocation of labor across sectors for these districts after the completion of the corridor.

Figure 3.3.1.2 District-wise Percentage Distribution of Employed Persons



3.3.1.3. District-wise Distribution of Employed Persons for Sub-Sectors/Industries

Figure 3.9 represents the breakdown of the agriculture sector into sub sector/industries - crop production and fishing - to describe the percentage of employed persons in these industries. In all ZOI districts, almost the entire employed population in the agriculture sector belongs to the crop and animal production industry. However, in contrast Gwadar is the only district with 49 percent share in Fishing and Aquaculture.

Figure 3.9 District-wise Percentage Distribution of Employed Persons: Sub-sectors of Agriculture

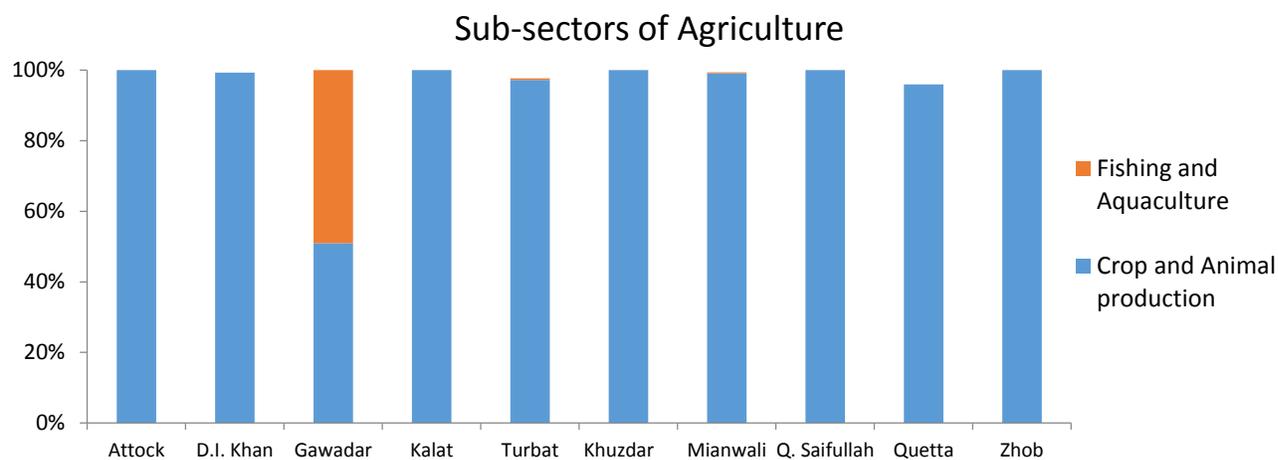


Figure 3.10 represents the breakdown of the manufacturing sector into major sub-sectors/industries, which include wood and cork products except furniture, other non-metallic mineral products, wearing apparel, textiles, and other manufacturing industries. It can be seen that most of the employed persons from the manufacturing sector in the ZOI districts belong to wearing apparel industry. Specifically, Khuzdar, Gawadar, and Kalat have the largest proportion employed in the wearing apparel industry – 93.9, 87.2, and 76.1 percent respectively. However, there are some manufacturing industries which have the largest proportion of employed people for particular districts as compared to the others. For example, in Turbat and Qilla Saifullah the employed persons from the manufacturing sector are comparatively greater in proportion in Other Manufacturing industries⁹ as compared with other districts. On the other hand, Attock and D.I. Khan have the largest share of employed persons in textile (22.8 percent) and other non-metallic mineral products (21.6 percent) respectively.

⁹ Manufacture of jewellery, musical instruments, sports goods, games and toys, and medical and dental instruments and supplies

Figure 3.3.1.3 District-wise Percentage Distribution of Employed Persons: Sub-sectors of Manufacturing

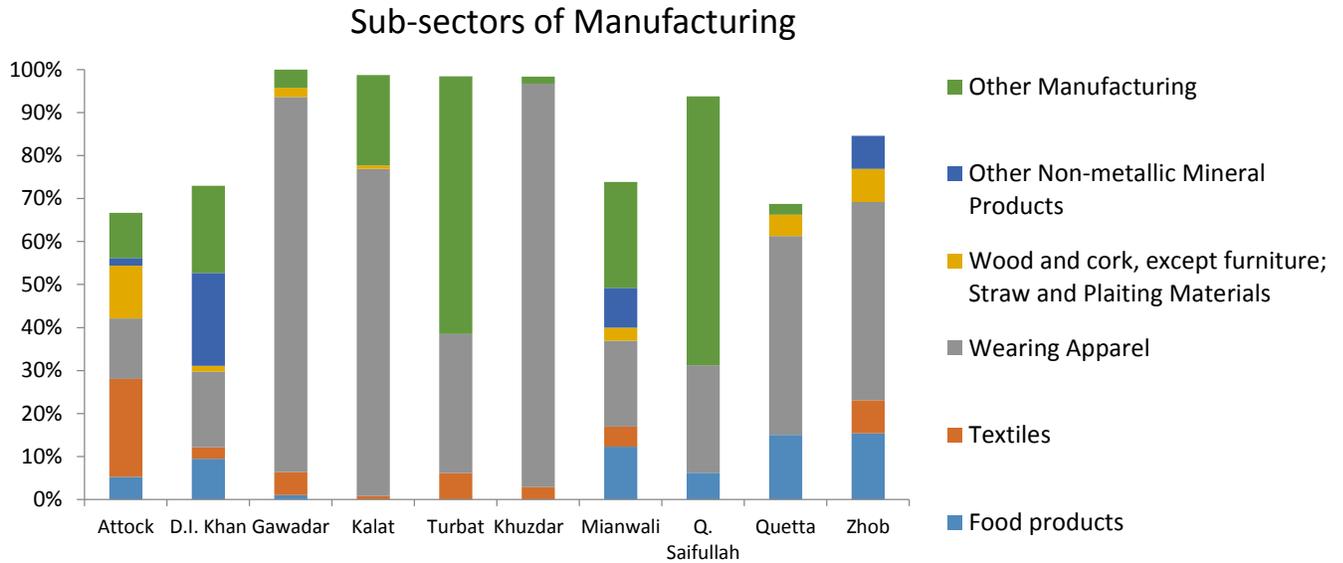


Figure 3.11 shows percentage distribution of employed persons by classifying construction sector into construction of buildings and civil engineering. In all ZOI districts, almost the entire employed population in the construction sector belongs to the civil engineering industry. On the other hand, construction of building accounts for less than 12 percent of employed people in all ZOI districts except Kalat where 23 percent of employed people belong to construction of buildings.

Figure 3.3.1.3 District-wise Percentage Distribution of Employed Persons: Sub-sectors of Construction

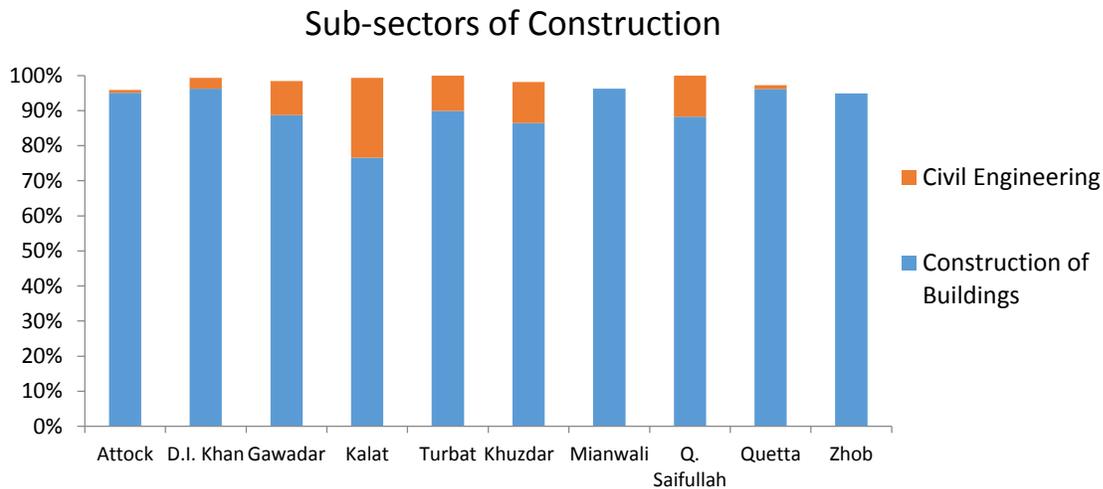
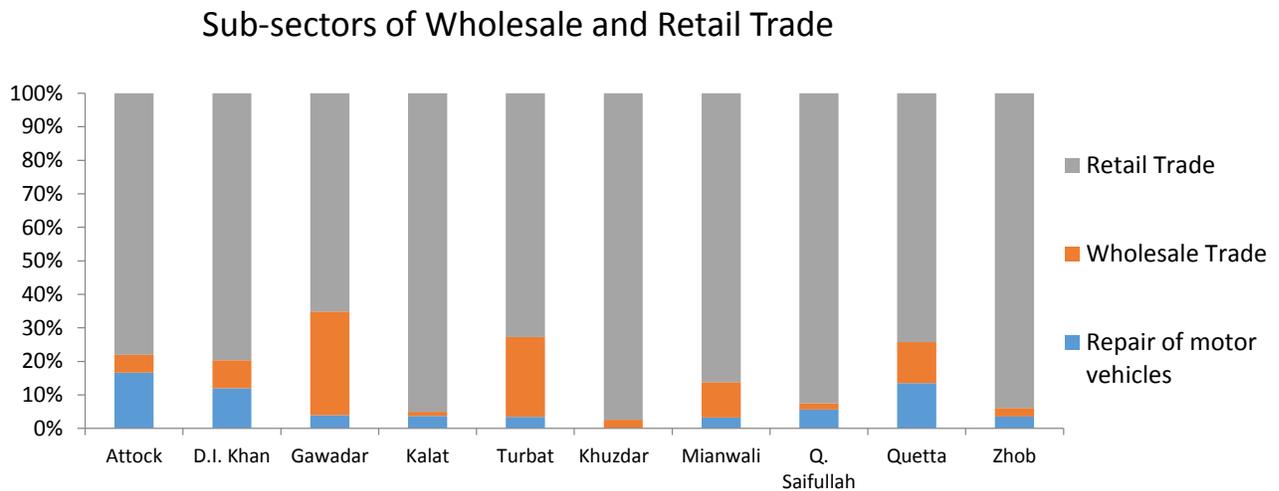


Figure 3.12 represents the breakdown of Wholesale and retail trade sector. In ZOI districts, almost the entire employed population in this sector belongs to retail trade. Wholesale trade, on the other hand, accounts for less than 13 percent of employed people in all ZOI districts except Gawadar and Turbat where the proportion of employed people in the wholesale trade is comparatively higher than the other districts – 31 and 24 percent respectively. Repair of motor vehicles accounts for less than 17 percent of employed people in all ZOI districts.

Figure 3.3.1.3 District-wise Percentage Distribution of Employed Persons: Sub-sectors of Wholesale & Retail Trade



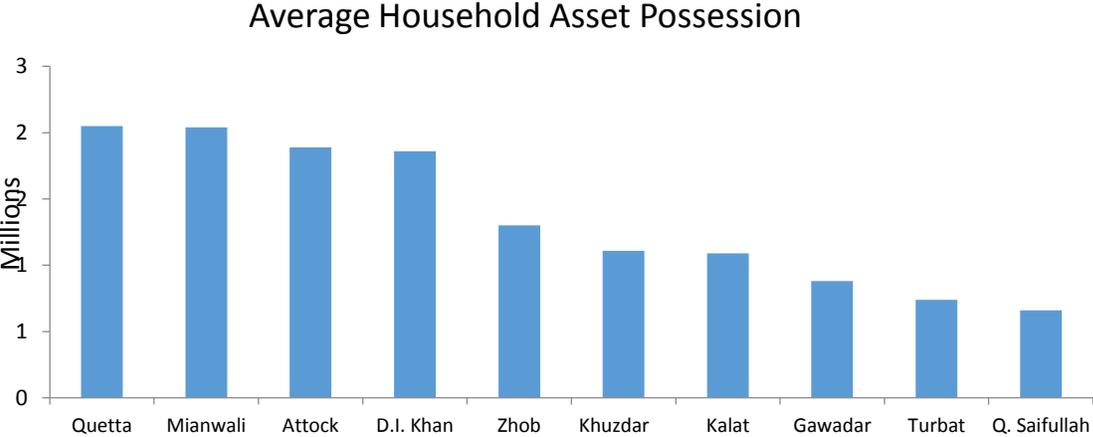
The results conclude that the major share of employment across the ZOI is associated with agriculture sector, however the share of employed persons varies across the districts; districts which are relatively more developed, such as Quetta, Attock, and Gawadar, have less employment share in agriculture as compared to the less developed districts such as Zhob, Qilla Saifullah, and Kalat. The study also indicates that the wearing apparel industry has the major share of employment in manufacturing sector in most of ZOI districts while the civil engineering industry has the highest share of employment in the construction sector.

3.3.1.4. Household Asset Possession

The households' asset possession is taken as proxy to households' financial status. It is represented by market value of capital assets held by households which include agricultural land, residential

building, livestock, poultry birds, non-agricultural land or property, and shop or commercial buildings. The CPEC is expected to increase value of household assets (wealth) not only due to increase in land demand as a result of migration toward the economic corridor but also due to increase in land productivity. Figure 3.13 shows current status of household asset value (in PKR) among the ZOI districts. Quetta, Mianwali, and Attock have the highest value of household assets on average while Gwadar, Turbat, and Qilla Saifullah have the lowest.

Figure 3.3.1.3 Average Asset worth of Households (PKR)



SECTION IV: CONCLUSION AND POLICY RECOMMENDATIONS

The study highlights current socioeconomic condition of ZOI districts across the Western route of China Pakistan Economic Corridor. The study will be used as a benchmark to conduct impact assessment of socioeconomic conditions of the ZOI districts which compares the socioeconomic conditions of the districts after the completion of the corridor with their current status.

This study indicates that low financial status (household asset possession) and greater travel time from schools in ZOI districts can cause low enrollment. Similar reasons can also be associated with low utilization of health facilities. This suggests addressing issues of accessibility to schools and health units to increase enrollment and health utilization respectively. Also, schools and health units should be built nearest to communities to facilitate their accessibility.

This study also provides current status of employment in different sectors across the ZOI districts. The employment situation of the main sectors is further explored for the industries/ sub-sectors which have the major employment share. The highest share belonging to the wearing apparel industry in manufacturing sector employment implies that the increased accessibility of wearing apparel industry to market in the ZOI districts can potentially create jobs in the industry.

Another important matter is that most of the economic zones would be built on the Eastern route which may create unrest in other provinces – KPK and Balochistan. Therefore, it is suggested that more economic zones should be built on those areas of Western route where it is economically and politically feasible and this may also contribute to reducing insurgencies in the associated areas.

The construction of economic zones in the Western route (mainly Zhob and Khuzdar) would potentially shift labor from agriculture to other sectors. This suggests that government should establish institutions where local people can be trained for the resulting diverse nature of jobs and thus increase their productivity. The corridor would not only facilitate the agriculture sector but also the fishing industry in Gwadar by increasing accessibility to urban and international markets which would create more jobs in these sectors. Given this, the Pakistan Government needs to enhance storage capacity particularly for perishable commodities, increase accessibility to markets, facilitate fish farmers in earning market return, and explore national and international markets for these products to increase jobs in ZOI districts.