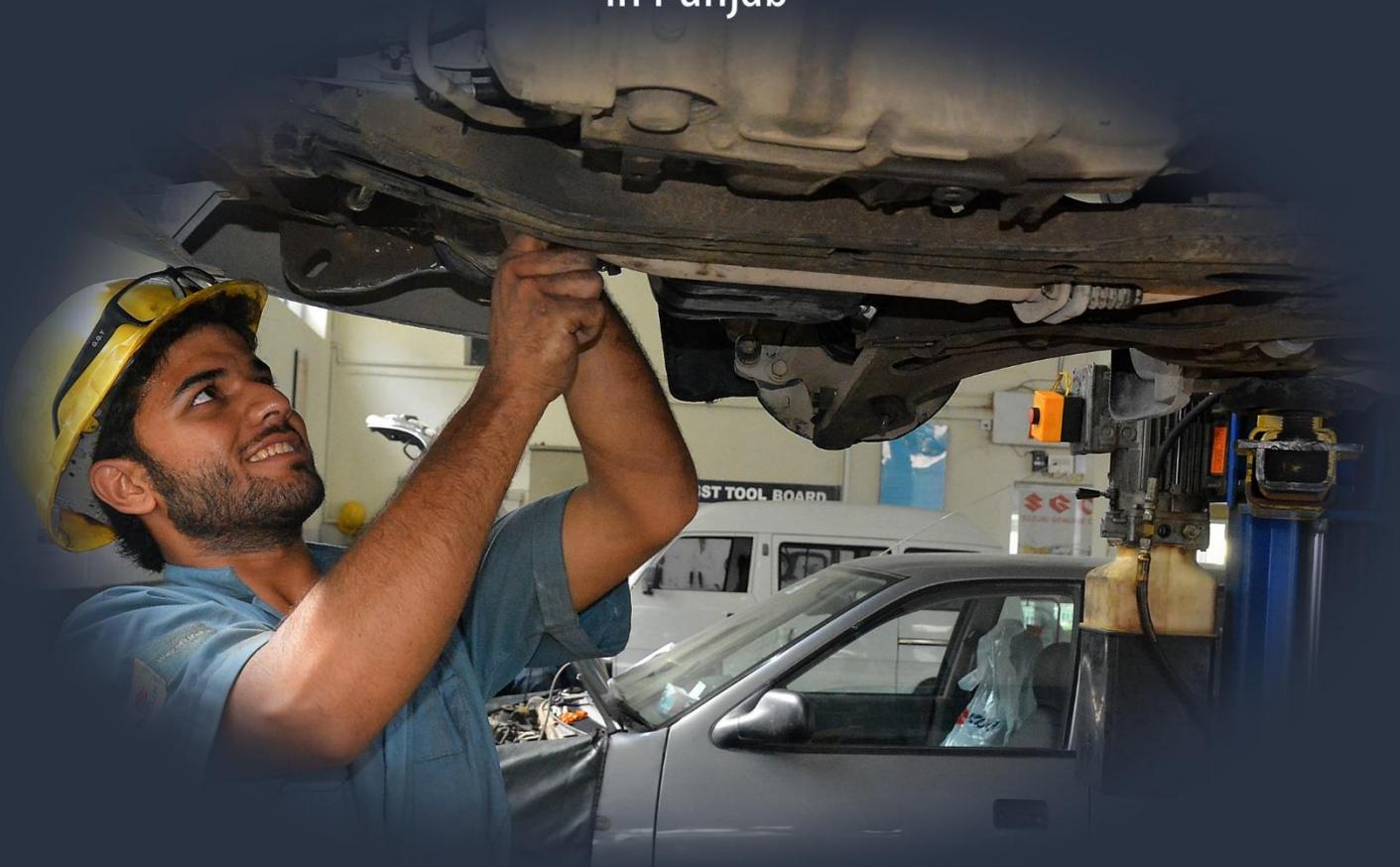


Study on

Producing Skilled Workforce for Potential Economic Sectors

in Punjab



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TVET Sector Support Programme

House 23, Street 55, F-7/4,

Islamabad, Pakistan

T +92 51 8469 120

F +92 51 2608 860

www.giz.de

www.tvetreform.org.pk

Responsible

Mr. Hans-Ludwig Bruns, Head of Programme, TVET Sector Support Programme

Mr. Muhammad Ali Khan, Team Leader Private Sector Engagement/DV, TVET Sector Support Programme

Mr. Mansoor Zaib Khan, Regional Coordinator Punjab, TVET Sector Support Programme

Authors

Mr. Wilhelm F. Weidmann, International Short Term Consultant

Mr. Muhammad Ali, National Short Term Consultant

Edited by

Ms. Sonia Emaan, Technical Advisor Communication, TVET Sector Support Programme

Layout & design

Mr. Niaz Muhammad, Junior Communication Officer, TVET Sector Support Programme

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Abbreviations

| | |
|------------------|--|
| AAP | EU Annual Action Programme |
| ADB | Asian Development Bank |
| ATC | Apprenticeship Training Centre |
| CAD/CAM | Computer-aided design/Computer-aided manufacturing |
| CBT | Competency based training |
| CBT&A | Competency-based Training & Assessment |
| CDTC | Ceramics Development & Training Centre |
| CNC | Computerised numeric control |
| CPC | Cleaner Production Centre |
| CVT | Cooperative vocational training |
| DTI | DESCON Training Institute |
| EU | European Union |
| FPCCI | Federation of Pakistan Chambers of Commerce and Industry |
| GCCI | Gujranwala Chamber of Commerce and Industry |
| GDP | Gross Domestic Product |
| GIZ | Deutsche Gesellschaft für Internationale Zusammenarbeit |
| GSP | Generalised Scheme of Preferences |
| GTDMC | Gujranwala Tool, Die & Mould Centre |
| HR | Human Resources |
| HRD | Human Resource Development |
| IACT | Institute of Advancing Career and Talents, Karachi |
| ILO | International Labour Organisation |
| IST | Institute for Surgical Technology |
| ISTC | International Short Term Consultant |
| LCCI | Lahore Chamber of Commerce |
| LCV | Light Commercial Vehicle |
| LESC | Light Engineering Service Centre |
| LPDI | Leather Products Development Centre |
| MIDC | Metal Industry Development Centre |
| NAVTTTC | National Vocational and Technical Training Commission |
| NSS | National Skills Strategy |
| NSTC | National Short Term Consultant |
| NVQF | National Vocational Qualification Framework |
| PAAPAM | Pakistan Association of Automotive Parts and Accessories Manufacturers |
| PCMA | Pakistan Ceramics Manufacturers Association |
| PFMA | Pakistan Footwear Manufacturing Association |
| PGMEA | Pakistan Gloves Manufacturers & Exporters Association |
| PHMA | Pakistan Hosiery Manufacturers & Exporters Association |
| PIFFA | Pakistan International Freight Forwarders Association |

| | |
|---------------|---|
| PKR | Pakistani Rupee |
| PKTI | Pakistan Knitwear Training Institute |
| PLC | Programmable Logic Controller |
| PRGMEA | Pakistan Readymade Garments Manufacturers & Exporters Association |
| PRGTTI | Pakistan Readymade Garments Technical Training Institute |
| PSDF | Punjab Skills Development Fund |
| PSGMEA | Pakistan Sports Goods Manufacturers & Exporters Association |
| PTEVTA | Punjab Technical Education and Vocational Training Authority |
| PVTC | Punjab Vocational Training Council |
| QA | Quality Assurance |
| ROB | Rules of Business |
| SEC | Securities and Exchange Commission |
| SIDC | Sports Goods Development Centre |
| SME | Small and Medium Enterprises |
| SOP | Standard operating procedure |
| SSC | Sector Selection Criteria |
| STC | Short term consultancy |
| STC | Short Term Consultancy |
| STEVTA | Sindh Technical Education and Vocational Training Authority |
| TEVTA | Technical Education and Vocational Training Authority |
| TNA | Training needs analysis |
| TOR | Terms of Reference |
| TVET | Technical Vocational Education and Training |
| UNDP | United Nation Development Programme |
| USD | US Dollar |
| NSIS | National Skills Information System |

Executive Summary

Prioritization of the job market according to the potential sectors plays a vital role in the socio-economic development of any country. Based on the idea of fulfilling the gap for the availability of relevant skill-set in potential sectors, a sector/sub sector identification mission was carried out in November, 2016 to support the TVET Sector Support Programme (TVET III) in defining future interventions. In this study, economic sectors and trades showing high employment potentials, relevant business membership organisations and training facilities were identified.

Based on the assessment of national and provincial development strategies and programmes, relevant sector studies and the DoA, TVET III, potential target sectors/sub sectors were pre-selected and short listed using the following selection criteria:

- Priority reflected in the socio-economic development plans of federal and provincial governments
- High employability potentials: preferable local demand; overseas employment according to concrete demand
- Balance of industrial and artisan trades
- Availability of information and materials for identification of possible skills gap
- Trades and professions covered by the existing CBT&A curricula and packages
- Possibility of identification of capable business organisations (chambers, associations, etc.)
- Possibility of identification of relevant and potential training providers

The Punjab Growth Strategy 2018¹ provides the focus of the Government's direction and policies for socio-economic development in Punjab. The Growth Strategy aims at enabling the private sector to lead Punjab's growth. It further supports enhancing the productivity of scarce resources by upgrading infrastructure, introducing modern techniques and streamlining regulations that hamper productivity.

Key segments of the Punjab Growth Strategy 2018:

- Private sector-led economic growth
- Manufacturing and industrial development
- Employment-intensive economic growth
- Focus on export-oriented economic growth
- Cities and urban development

The Punjab Growth Strategy 2018 is augmented by the PSS. The Provincial government recognises the need for taking effective measures to build the human capital of new entrant into the labour market. The Punjab Government's "Skills Strategy" is based on the following features:

- Ensuring adequate supply of demand-relevant, good quality skills training opportunities

¹ Punjab Growth Strategy 2018, Government of the Punjab, Planning & Development Department, March 2015

- Implementing and mainstreaming measures that lower the cost of accessing these skills training opportunities
- Maximizing the return to skills training opportunities through complementary interventions that strengthen linkages of trainees with jobs and markets
- Applying a holistic approach by using a “New Model of Skills Training” in Punjab
- Improvement of vocational training institutions and methodologies
- Reforming the testing and certification system

Using the extended desk review, discussions with the technical teams at the TVET RSP, external consultants and considering the SSC, a number of sectors and subsectors relevant cities, districts and cluster areas were identified for sampling of this study. Approximately 25 meetings and field visits were scheduled with the related government entities, chambers, associations, training institutions, companies and individuals for empirical evidence, information and verification.

The sectors and subsectors identified in Punjab are in line with policies of the federal and provincial government, relevant documents of the TVET RSP and the selection criteria developed for the conduct of this study. Following are the sectors/sub sectors, which came as the potential ones with comparatively high employability to be addressed in the next phase of the Programme.

| Geographical Area Cluster Location | Sector/Subsector | Employment potentials |
|---------------------------------------|--|--------------------------|
| Lahore/Faisalabad | Textile Sector/Readymade garments (knitted, woven) | ~ 133,000 / 5 years |
| Lahore | Light Engineering/Auto Parts | ~ 50,000 / 3-5 years |
| Gujranwala | Manufacturing/Ceramics | ~ 500 – 800 / annum |
| Gujranwala | Light engineering/Metal Fabrication | ~ 500 – 800 / annum |
| Sialkot | Light Engineering/Surgical Instruments | ~ 3,300 / 5 years |
| Sialkot | Manufacturing/Sports Goods | ~ 70,000 / 5 years |
| Lahore | Service Sector/Logistics, Customer Service | ~ 1,500 – 2000 / 3 years |
| Lahore/ Faisalabad/Sialkot | Construction/Masonry, Plumbing, Carpenters | 1~ 150,000 / 5 years |

The following business member organisations are related to the sectors/sub sectors identified. The trade associations and chambers were visited for this study. The organizations expressed their willingness to cooperate in terms of design and delivery of vocational training in their respective sector/subsectors. These organizations have a strong membership base and are actively working for their respective organizational interests.

| Geographical Area Cluster Location | Chamber/Association | Related Training Establishment |
|---------------------------------------|--|--|
| Lahore, Faisalabad | Pakistan Hosiery Manufacturers & Exporters Association (PHMA), Northern Zone Lahore Email: secretary.general@phmaonline.com, Webpage: www.phmaonline.com | Pakistan Knitwear Training Institute (PKTI), Lahore, (PKTI is attached to PHME) National Textile University (NTU), Faisalabad |

| Geographical Area Cluster Location | Chamber/Association | Related Training Establishment |
|------------------------------------|---|---|
| Lahore/Faisalabad | Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA), Northern Zone Lahore Email: info@prgmra.org Webpage: www.prgmea.org | Pakistan Readymade Garments Technical Training Institute, Lahore, (officially linked to PREGMEA) |
| Sialkot | Surgical Instruments Manufacturers Association of Pakistan (SIMAP) Sialkot Email: info@simap.org.pk Webpage: www.simap.org.pk | Metal Industries Development Centre (MIDC), Sialkot Institute for Surgical Technology (IST), Sialkot Government Apprenticeship Training Centre (ATC), Sialkot |
| Sialkot | Pakistan Sports Goods Manufacturers and Exporters Association (PSGMEA), Sialkot E-mail: psgmea@gmail.com, psgmea@psgmea.org.pk Website: www.psgmea.org.pk | Sports Industry Development Centre (SIDC), Sialkot, (officially linked to PSGMEA) Government Apprenticeship Training Centre (ATC), Sialkot |
| Sialkot | Pakistan Gloves Manufacturers and Exporters Association (PGMEA), Sialkot Email: pgmea@brain.net.pk Webpage: www.pgmea.org.pk | Leather Products Development Institute (LPDI), Sialkot (Officially related to PGMEA). |
| Lahore | Pakistan International Freight Forwarders Association (PIFFA), Lahore Chapter Email: piffa@piffapk.com URL: www.piffapk.com | PIFFA Training Institute Karachi and Lahore |
| Lahore | Pakistan Association of Automotive Parts and Accessories Manufacturers (PAAPAM) Website: www.paapam.com | TEVTA Training Facilities Apprenticeship Training Centre (ATC) Punjab Vocational Training Council (PVTC) DESCON Technical Institute (DTI), Lahore Universities |
| Gujranwala | Pakistan Ceramics Manufacturing Association (PCMA), Gujranwala | Ceramics Development & Training Complex (CDTC), Gujranwala. (officially linked to PCMA) |
| Gujranwala | Gujranwala Chamber of Commerce and Industry (GCCCI) www.gcci.org.pk | TEVET Institutions, Gujranwala Light Engineering Services Centre (LESC), Gujranwala. Tool, Die & Mould Centre, Gujranwala Apprenticeship Training Centre (ATC), Gujranwala |
| Sialkot | Sialkot Chamber of Commerce and Industry (SCCI) Web: http://scci.com.pk | TVET Institution, Universities |

Priority Recommendations

Sectors with high employment potentials, supportive business membership organisations, adequate training facilities and availability of CBT&A training courses are ranked as follow:

- Light Engineering/Auto parts, Lahore
- Textile/Readymade Garments, Lahore, Faisalabad
- Light Engineering/Metal Fabrication, Gujranwala
- Light Engineering/Surgical Instruments, Sialkot
- Textile/Leather Goods, Leather Wear, Sialkot
- Services/Logistics, Customer Service, Lahore

Way Forward: Sialkot Chamber of Commerce and Industry

- Follow-up meetings shall be conducted to discuss the mode and level of interaction with the Programme, specifically the training measures of NVQF 1–3
- The Chamber is willing to assess its capacity building needs to professionalise the interaction with the TVET system
- R&D department shall conduct TNA as a membership service and possible input to the TVET system

Way Forward Gujranwala Chamber of Commerce and Industry

- Follow-up meeting shall be conducted to discuss the mode and level of interaction with TVET III
- The Chamber is willing to assess its capacity building needs to improve and widen the membership services and explore the possibility of closer cooperation and interaction with the TVET system
- The Chamber identified immediate skills training needs in aluminium and steel fabrication, however, it can assist as focal point for other demand-oriented training needs

All trade associations were open to interact with the Programme and are looking forward to discuss further steps and activities. The need of a versatile (multi-tasking) trained workforce was mentioned by all the associations for increase in productivity, quality and flexibility. The associated service and training centres have different experiences in designing and delivery of initial and further upgrading training courses. In some cases, trainings were conceptualised and delivered very well; while, other centres have scarce experience to operate trainings of NVQF 1-3 as needed by the industry

Way Forward for the Associations

- Follow-up meetings shall be conducted with selected associations to further discuss the mode and level of interaction with TVET III

- All associations have indicated the need to improve and widen their membership service and are willing to assess their capacity building needs
- Since the associations are quite active in their respective realms, measures of raising awareness and capacity building are required to improve closer and formal employer-led cooperation and interaction with the TVET system
- Capacity building of management is also required on the level of the association to interact professionally and provide the expected management guidance to the common service and training centres
- The common service and training centres often lack management skills to operate the centre effectively and efficiently
- In order to provide adequate skills training; technical and pedagogical training is required in all establishments, identified to cooperate with the association and/or the Programme

Introduction

Scope of the Assignment

The assignment was aimed to support the TVET RSP in defining future interventions to be undertaken during Phase II of the implementation of TVET sector reforms particularly in Punjab. Under this setting, economic sectors and trades with high employment potentials were to be identified for possible future TVET provisions. In order to link TVET closer to the labour market, the task included identification of relevant business membership organisations (e.g. chambers, associations etc.). Also, the study aimed on the identification of suitable training institutes having the will and capacity to develop and deliver TVET qualifications.

Assignment Objectives

Main objectives include:

- Identification of sectors having high and well paid employment potential which may include overseas employment
- Identification of the required trades, professions
- Identification of possible skills gap
- Identification and rating of the relevant training institutes
- Identification and rating of the relevant chambers/associations
- Formulation of recommendations/preparation of future roadmaps

The following deliverables were agreed upon:

- Providing a detailed work plan/inception report to carry out the task
- Identification of at least four economic sectors/subsectors with high employment potentials and identifying suitable business membership organisations and training providers in the identified economic sectors
- Preparing a final report, recommending and assessing the relevant business organisations and possible training providers
- Proposing a road map for each selected economic sector, defining the capacity building requirements and stating the TVET qualifications in demand

The task was accomplished during the short-term consultancy period of October 31-December 15, 2016 and included field visits in Punjab

The team Punjab consisted of two external consultants:

Mr. Muhammad Ali, National Short Term consultant

Mr. Wilhelm F. Weidman, International Short Term Consultant.

Methodology

General Approach

To support Programme to achieve its objectives and sustainability, the study mainly considered the government's development thrusts, projections and programmes for economic growth, employment generation and socio-economic development.

Step 1: Priority in the economic development plans of federal and provincial governments.

Major resource materials include:

- Pakistan 2025; One Nation-One Vision
- Punjab Growth Strategy 2018
- Punjab Skills Development Sector Plan 2018
- TVET Development Strategies and Policies
- EU-Pakistan bilateral trade relations; Cooperation Agreement, 2004
- EU-Pakistan 5-year Engagement Plan 2012
- Economic Sector and Labour Market Analysis, SEQUA, October 2016

Step 2: Identifying and retrieving sector-wise economic development strategies, policies and empirical data.

Major resource materials include:

- Backgrounds, policy papers and information provided by or available with relevant line ministries
- Papers and documents available from World Bank², ADB, ILO, UNDP, PSDF, etc.
- Labour Market Intelligence Survey (Textile), NSIS Cell, NAVTTC
- Report on Gap Analysis, Pakistan, NSIS Cell, NAVTTC
- Skills Need Assessment for the Construction Industry, PSDF
- Studies, projections, trends and targets available from Chambers of Commerce and Industries, sectoral associations and research organisations

Specific Approach

Following the assessment of the provincial socio-economic development strategies and programmes, potential target sector/subsectors were pre-selected and short-listed for more detailed analysis:

Sector/subsector selection criteria included:

- Priority in the socio-economic development plans of federal and provincial governments
- High employability potentials: preferable local demand; overseas employment may be included if concrete demands exists

² E.g.: World Bank. 2013. *Pakistan - Finding the path to job-enhancing growth: a country economic memorandum*. Washington DC: World Bank.

- Balance of industrial and artisan trades
- Availability of information and materials to identify possible skills gaps
- Trades and professions covered by available CBT&A curricula and packages
- Possibility to identify capable business organisations (chambers, associations, etc.)
- Possibility to identify relevant and potential training institutions

2-Step Geographical Outreach

Initial Phase

Industrial sector of Punjab is divided into various regional clusters mainly located in Lahore, Gujranwala, Sialkot and Faisalabad. This study followed regional cluster mapping, carried out in said areas.

On-going Programme Implementation

After gaining experience with the pilot programmes and availability of additional sector information, further areas and business clusters can be identified and assessed which may include: Gujrat, Multan, Sarghoda, Rahim Yar Khan and others as identified by the stakeholders.

Work Pattern

The assignment was based on a participatory non-directive advisory style and included:

- Comprehensive internet research; collection, desk review and assessment of relevant materials
- Field visits to cities and districts of Lahore, Gujranwala, Sialkot
- Interviews, focus group discussions and one-on-one dialogs with chamber, association, TEVTA and company representatives as well as programme personnel and other national and international consultant commissioned by GIZ
- Viewing, observing and assessing of factory and workshop setups, production processes and formats of training establishments
- Citation of used resource materials is kept at a low level to facilitate easier reading

Overall Schedule

| Place/ Date | Topic |
|---|---|
| October 30 to November 20, 2016 Lahore | <ul style="list-style-type: none"> • Briefing, assignment preparation, field visits and meeting scheduling. • Fact finding and field visits in cities and districts of Lahore, Gujranwala, Sialkot. • Consultative meetings w/ PTEVTA, Lahore Chamber of Commerce and Industry, Trade Associations and companies. • Identification of sectors/subsectors and trades with job openings and employment potentials. • Visit to relevant training and sector specific common service facilities. |
| November 28 to December 15, 2016 | Assignment documentation, report writing and follow-up activities. |

The detailed Work Schedule is provided as Annex 02.

Socio-economic Parameter

National Framework

Socio-economic Framework

Meaningful advances in the socio-economic field are crucially linked with the availability of sufficiently educated and trained workforce. While education is considered to be the “key” to development, TVET is termed as the “master key”.

Changes in technology, the emergence of global markets for products and services, international competition, the emphasis on attracting foreign direct investment, new forms of business organization and production and new environmental challenges have created a demand for new, diversified, sectoral relevant skills and knowledge in existing labour markets.

This recognizes that the economic development does not automatically lead to improvements in the quality of work and consequently to poverty reduction. This adheres that the employment and labour market should be aligned with the central to economic policies, so as to ensure that the economic progress is inclusive and does not lead to rising inequalities.

Pakistan’s economy during FY 2016 recorded a growth of 4.71 percent which is the highest since 2008-09. The economy could not achieve the targeted growth rate 5.5 percent due to lower growth of agriculture sector 0.19 percent which is mainly due to decrease in production of cotton, rice and maize. However, Industrial sector recorded the growth of 6.80 percent and Services sector accelerated at the rate of 5.71 percent.

The commodity producing sector accounted 40.84 percent of GDP during this fiscal year has performed slightly lower in outgoing fiscal year as compared to last year; it grew by 3.29 percent as compared to 3.65 percent last year. The industrial sector contributes 21.02 percent in GDP, recorded a growth of 6.80 percent as compared to 4.81 percent last year. Performance in the industrial sector shows that it has surpassed the targeted growth of 6.4 percent, which is a clear indicator that industrial revival is taking place on fast track.

Industrial sector has four sub sectors including mining & quarrying, manufacturing, electricity generation & distribution and gas distribution & construction. Manufacturing registered a growth of 5.00 percent during this fiscal year as compared to 3.90 percent last year. Construction is considered as one of the potential components of industrial sector which has recorded a growth of 13.10 percent against the growth of 6.24 percent last year. This sub sector has crossed the targeted growth of 8.5 percent. Mining and quarrying has recorded a growth of 6.80 percent against the growth of 3.97 percent last year. Electricity generation & distribution and Gas Distribution has registered a growth of 12.18 percent during this fiscal year as compared to 11.98 percent growth last year.

Services sector also met the planned target and has emerged as the most significant driver of economic growth and contributing a major role in augmenting and sustaining economic growth in

the country. The share of the services sector has increased from 56.6 percent of GDP FY 2009 to 59.16 percent in FY 2016. Services sector has witnessed a growth of 5.71 percent in this fiscal year as compared to 4.31 percent last year.

Services sector performance remained broad based, as all components of services contributed positively. Wholesale and Retail Trade grew by 4.57 percent, Transport, Storage and Communication by 4.06 percent, Finance and Insurance by 7.84 percent, Housing Services by 3.99 percent, General Government Services by 11.13 percent and other private Services by 6.64 percent.

On the expenditure side, main growth drivers are consumption, investment and exports. The private consumption expenditure in nominal terms reached to 80.1 percent of GDP in FY 2016 as compared to 80.0 percent of GDP last year, whereas public consumption expenditures are 11.8 percent of GDP as compared to 11.0 percent last year.

Investment is the second important component of aggregate demand. Total investment has reached to the level of Rs. 4502 billion as compared to the Rs. 4256 billion last year, showing the growth of 5.78 percent in FY 2016. Investment to GDP ratio has reached to 15.21 percent in FY 2016. Fixed investment have increased to Rs. 4028 billion as compared to Rs 3816 billion last year, it has recorded growth of 5.57 and fixed investment as percentage of GDP is recorded at 13.61 percent. Private investment has recorded a growth of 3.71 percent and private investment as percentage of GDP reached to 9.79 percent. Whereas public investment grew by 10.63 percent and as percentage of GDP it has increased from 3.72 percent to 3.82 percent, which is an indicator that government expenditure strategy is development oriented.

Pakistan's overall development thrust is directed to trigger improved economic growth in order to overcome the existing challenges and provide socio-economic development to the citizens. Although year 2017 and 2018 are projected to provide modest growth; additional job creation and expected growth, in Pakistan is still a challenge in comparison to the other neighboring economies in South Asia.

Providing conducive framework conditions to promote businesses for improved economic growth and generation of additional employment opportunities require a qualified workforce. The ongoing TVET sector reform addresses this challenge.

Selected facts of EU trade and economic relations are interesting in the context of the selection of sectors and subsectors. The EU is one of Pakistan's largest trading partners and the largest market for Pakistani exports. The overall EU-Pakistan trade volume reached €10.49 billion in 2015 up by 20.14 percent from 2013 with Pakistan enjoying a €1.6 billion surplus in the balance of trade with the EU. Trade with the EU accounted for about 22 percent of Pakistan's total trade in 2015. The EU received about 28 percent of Pakistan's total exports whereas about 12 percent of Pakistan's imports comprise of EU manufactured products.

Pakistan's exports to the EU are heavily dependent on textile and clothing products followed by leather products. The main imports from the EU are machinery and appliances (25.5%) followed by transport equipment (16.5%) chemicals and pharmaceuticals (15.5%).

Trade picture:

- The EU being Pakistan's most important trading partner taking 21.2 percent of Pakistan's total exports.
- EU-Pakistan trade increased by almost 4.7 percent annually between 2007 and 2011.
- Pakistani exports to the EU are dominated by textiles and clothing as well as leather products. Textiles and clothing account for just under 75 percent of Pakistan's exports to the EU.
- Pakistan's imports from the EU mainly comprise of mechanical and electrical machinery as well as chemical and pharmaceutical products.

Pakistan is a major beneficiary of the trading opportunities offered by the EU GSP. From January 1, 2014 Pakistan benefits from generous tariff preferences (mostly zero duties on two thirds of all product categories) under the so-called GSP+ arrangement aiming to support sustainable development and good governance. The GSP+ preferences should also help Pakistan diversify its export basket. In order to maintain GSP+, Pakistan has to keep ratification and effectively implement 27 core international conventions on human and labour right, environmental protection and good governance.

TVET Framework

The NSS, which is the basis for on-going reform in the TVET sector, defined three objectives:

- (i) Providing relevant skills for industrial and economic development;
- (ii) Improving access, equity and employability; and
- (iii) Assuring quality to address the major issues confronting the TVET system. Based on the NSS and the Vision 2025, the Ministry of Federal Education and Professional Training developed a broader national TVET policy with the participation of various stakeholders from public and private sector.

The TVET policy places emphasis on increasing training opportunities for young people, re-skilling existing workers, implementing the NVQF and the CBT&A approach. Supporting the vision of the national TVET policy, Pakistan has already embarked upon a comprehensive TVET Sector Support Programme in 2011.

During the first phase of the Programme, which ended in December 2016, headway has been achieved in areas of improving TVET governance and creating a paradigm shift in the TVET design and delivery.

The second phase of the Programme (TVET III 2017–2022) has been built on the groundwork, policies and results of the previous phase. It aims at taking the reform to the next development stage; provide wider access to adequate vocational training and higher involvement of chambers, trade associations and private sector business establishments in TVET design and delivery.

With relation to the EU-Pakistan cooperation, the EU support the Government of Pakistan in two priority areas as formulated in the AAP 2015:

1. To contribute towards socio-economic growth through development of human resources, enabling people to engage in productive employment, and;
2. To promote full integration of structurally poor and backward regions into the mainstream national development agenda by enhancing opportunities for economic growth and sustainable livelihoods in rural areas.

Annex 1 of AAP 2015 provides details as Action Document for "Support to the Technical and Vocational Education and Training Sector in Pakistan (TVET III)".³

The overall objective of the project (TVET III) is to contribute towards socio-economic growth through development of human resources, enabling people to engage in productive employment. The specific objective is to improve governance and private sector participation in the TVET sector to enhance access to quality skills development that meets demand of the labour market.

Expected result 1: Equitable access to market led TVET system and enhanced employability of graduates through implementation of relevant provisions of National TVET policy and NSS.

Expected result 2: Trainings designed and delivered with increased collaboration and private sector involvement, leading to greater employability.

Punjab Framework

The Punjab Growth Strategy 2018⁴ reflects the government's direction and policies for socio-economic development in Punjab. This strategy has been developed by the Planning and Development Department in consultation with all of the relevant agencies, legislators and an expert group of economists and sector specialists. The Punjab Growth Strategy 2018 complements the Vision 2025 launched by the Government of Pakistan in 2014.

The growth strategy aims at enabling the private sector to lead Punjab's growth. Further, it focuses on enhancing the productivity of scarce resources by upgrading infrastructure, introducing modern techniques and streamlining regulations that reduce productivity.

Punjab Growth Strategy 2018

Main components identified in the Punjab Growth Strategy include:

- Private Sector-led economic growth that will require a revival of investment by the private sector
- Employment-intensive economic growth that will require a focus on employment generation by revival of employment-intensive sectors and creation of quality jobs by addressing critical gaps in human capital
- Catalysing Punjab's GDP growth based on increasing the productivity of scarce resources via improving the investment climate
- Export buoyancy to be driven by a focus on export-oriented economic growth
- Complete social sector coverage to be embedded in quality provision of education, healthcare and social protection for the poor and vulnerable
- Effective security through improved governance and law & order

³ Source : http://ec.europa.eu/europeaid/countries/pakistan_en

⁴ Punjab Growth Strategy 2018, Government of the Punjab, Planning & Development Department, March 2015



Figure 1: Pillars of Punjab Growth Strategy ⁵

The strategy focusses on key segments:

- Manufacturing and industrial development
- Cities and urban development
- Agriculture, irrigation, livestock & dairy development, forest
- Skills development
- Education
- Preventive health, population planning and water & sanitation

Objectives to help achieve the vision 2018:

1. Achieving 8 percent economic growth (real GRP growth rate) in Punjab by 2018
2. Increasing annual private sector investment in Punjab to USD 17.5 billion by 2018
3. Creating 1 million quality jobs every year in Punjab
4. Training 2 million skills graduates in Punjab by 2018
5. Increasing Punjab's exports by 15 percent every year till 2018
6. Achieving all Millennium Development Goals and targeted Sustainable Development Goals in Punjab by 2018
7. Narrowing security gap with regional neighbours such as India and Bangladesh by reducing crime and improving law and order in Punjab

Implementing documents and programmes have been formulated by the respective line departments, agencies and competent bodies. The "Sector Plan for the Department of Industries, Commerce and Investment" and attached organisations are relevant as a practical translation of the Government of Punjab's Growth Strategy 2018 into a work plan for the department.⁶

Skills and Job Creation: Punjab's Skills Strategy

The steep increase of young adults seeking productive employment requires Punjab to expand its rate of job creation considerably. Estimates suggest that the demographic transition is likely to

⁵ Source: "Punjab Growth Strategy 2018", Presentation, Planning and Development Department, 4. December 2015

⁶ PUNJAB INDUSTRIES SECTOR PLAN 2018, Promoting Industrial Development and Investment, Government of the Punjab, January 2015

result in the entry of more than One million new workers in the labour force every year. This is of concern since the growth rate of employment is much lower than the constant supply of additional labour force in the recent past:

Main challenge: Demographic Transition

- Total population of Punjab is 101.4 million which is growing at the rate of 2.02 percent per annum
- Two-thirds of Punjab's population is below 29 years
- This youth bulge will carry on well beyond 2025

Skills Strategy - increased access to "quality employment"

Employment with better income for the people is one of the objectives of the Punjab's Growth Strategy 2018. The concept recognises that *human capital enhancement* is crucial to achieve this objective. The provincial government recognises the need for taking effective measures to build the human capital of new entrant into the labour market.

The Punjab Government's "Skills Strategy" is based on the following features:

- Ensuring adequate supply of demand-relevant, good quality skills training opportunities
- Implementing and mainstreaming measures that lower the cost of accessing these skills training opportunities and
- Maximizing the return to skills training opportunities through complementary interventions that strengthen linkages of trainees with jobs and markets

New Model of Skills Training in Punjab

The promulgated Skills Strategy embodies a break from the past and proposes a 'new model' of skills training that builds on recent innovations in Punjab (compare figure below). Its main features include:

- Developing a 'market' for skills training to ensure a supply of skills
- Developing best-practice curriculum and teaching and learning resources, through 'knowledge partnerships' with private sector
- Providing incentives to the private sector to engage in supply of skills training
- Creating a link between skills provisions and the need of priority sectors and high employability-high growth clusters and value-chains
- Institutionalizing mechanisms to elicit demand for skills
- Restructuring public sector institutions to substantially increase their efficiency
- Reducing the cost of accessing training opportunities for both men and women
- Strengthening job and market linkages by introducing integrated programmes



Figure 2: A New Model for Skills Training in Punjab⁷

Improvement of Vocational Training Organisation and Methodologies

The Skills Strategy promotes workplace-based vocational training schemes and quotes research papers showing low returns associated with skills training programmes that provide either in-class or workplace training only (See Figure 3). Consequently, integrated programs that combines on-the-job and classroom training have considerable higher positive returns. The success rates of skills training programme increase significantly when in-class and workplace training are combined with work experience and job placement components.

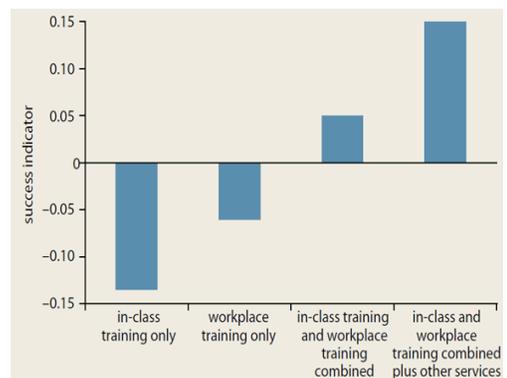


Figure 3: Correlation between type of skills training and the success of a programme.⁸

Reforming the Testing and Certification System

The Punjab government also intend to restructure the existing testing and certification regime by creating a single assessment authority that works under the National Vocational Qualification Framework (NVQF) NVQ being developed by the NAVTTC. The plans are to create a unit within the focal Skills Agency that engages with NAVTTC to build a competency-based system for skills and training and engages the private sector in this process. Besides the need to create an effective testing and certification regime, it is also important to apply an outcome-based funding system that rewards skills providers based on their ability to impact jobs and adequate income.

⁷ Source: Punjab Growth Strategy 2018, p. 48

⁸ Quoted Source: Fares and Puerto 2009 as shown in World Bank (2012), "World Development Report 2013: Jobs."

Identification of Sectors and Sub-sectors

Using the extended desk review, discussions with TVET Programme personnel, external consultants and based on the sector selection criteria; the study team identified and shortlisted a number of sectors and subsectors as well as the related cities, districts and cluster areas.

The team scheduled about 25 meetings and field visits with related government entities, chambers, associations, training institutions, companies and individuals for empirical evidence, information and verification. The recommended sectors/sub sectors are reflected in the following paragraphs and tables.

Textile Sector/Ready Made Garments (woven, knitted)

Sector Overview

The garments industry sector is considered as a potential driver of growth. Pakistan is among the top five producers of cotton in the world, accounting for almost 10 percent of total world output of cotton. Putting it advantage, the country has followed a proactive strategy of textiles-led industrialization. Pakistan's textile industry is a major contributor to the national economy in terms of exports and employment. Textile manufacturing provides 54 percent of national exports, 46 percent of manufacturing value added, 38 percent of industrial employment and almost 9 percent of national GDP. Within the textiles sector, garments are a significant and growing component. The value of garments exports has nearly quadrupled from USD 1.0 billion in 1990 to USD 3.7 billion in FY 2012. Denim exports alone have grown at a rate of 27 percent per annum.

Garments manufacturing is also highly labour intensive, hence having good potential for employment generation. Estimate shows that 50,000 pounds of cotton fibre create 400 jobs in spinning, weaving and finishing stages each, and another 1,600 jobs in garments manufacturing. There is a strong potential in the global markets for Pakistan to step in with an enhanced role as a garments supplier. However, international competition and increase of modern production methods require a much higher and more versatile qualified workforce.

The textile sector comprises of many sub sectors including spinning, weaving, knitting, ready-made garments, towels and canvas. Garments is a sub-sector of the textile sector and is broadly classified into *Woven* and *Knitwear* segments. Major garments manufacturing clusters are located in Lahore, Faisalabad, Sialkot and Gujranwala. Each of these clusters specialises in specific products; Lahore mainly produces denim products; Faisalabad mainly produces hosiery items (Knitwear) while Sialkot and Gujranwala produce sports and technical wear garments in both knit and woven categories. Majority of the entities in Garments sector comprises of SMEs with few large vertically integrated units.

The garments sector can be considered for the next phase of the Programme for its huge requirement of workforce at different levels, availability of training institutes, vibrant private sector organizations including PRGMEA and PHMA that will be able to continue the interventions after

the phasing out of the Programme. These industrial associations are able to run their training centres including PRGTTI and PKTI. *More details are provided in Sector Chart 3.1.*

Light Engineering/Auto parts

Sector Overview

The automobile sector is a large industrial sector of Pakistan manufacturing all types of vehicles including passenger cars, vans, jeeps, light commercial vehicles, buses, trucks, tractors, motorcycles and three wheelers. The automobile industry consists of three active car manufacturers (Suzuki, Toyota, Honda), 68 manufacturers of motorcycles and six units producing trucks/buses. Audi and Renault are also planning to setup their own plants in Pakistan. Automobile sector such as trucks, tractors, cars & jeeps and LCVs registered growth of 53.9 percent, 44.6 percent, 23.1 percent and 31.2 percent, respectively (Pakistan Economic Survey 2014-15) .

The auto parts manufacturing sector is the supply industry for automobile and motor cycle manufacturing and assembly units. Starting in 1980, the sector experienced a high growth rate with the entry of Japanese manufacturers into the Pakistani market. The auto part industry has shown a potential and development. The government supported this industry by mandatory use of locally manufactured parts for the local automobile manufactures and assemblers. Supported by this policy, the auto parts industry experienced high growth rates and numerous local businesses were setup. According to PAAPAM, there are 2,200 auto-parts manufacturers in Pakistan with the largest concentration of auto-parts manufacturing units in Karachi and the second largest in Lahore.

Pakistan's automobile and auto parts industries are a major contributor to the country's economy. In 2009-10, the share of the automobile sector in manufacturing was 5.3 percent which places it as the sixth largest manufacturing industry. In 2012, total turnover of the automotive industry was PKR 402 billion, comprising of PKR 234 billion from the assemblers and PKR 168 billion from auto parts manufacturers. In FY 2013-14 more than one million vehicles of different types (including cars, jeeps, trucks, busses, two/three wheelers) were produced as compared to two hundred thousand in FY 1995-96 which reflects a considerable growth rate (i.e. more than 400%) in the total output of the sector. Two/three wheelers have the highest share in the production. According to a working paper for the automotive sector by International Growth Centre, the total employment in sector is about 21,000 of which 187,000 persons work in the auto parts sector.

More details are provided in Sector Chart 3.2.

Manufacturing/Ceramics Industry Gujranwala

Sector Overview

Gujranwala ceramics cluster is quite known for its quality ceramics products. The industry caters mainly to the local market demand but also contributes to Pakistan's exports. The ceramic manufacturing sector plays a significant role in the economy of Pakistan. The sector employs country-wide over 36,000 people and contributes 0.1 percent to total GDP of the country and 0.5 percent to the manufacturing GDP annually. Its contribution to exports of the country is about USD 12.30 million per annum. Ceramic sanitary wares and tiles are essential consumer items in the urbanized areas of the country. With rapid urbanisation and related on-going construction, the demand for sanitary ware has massively increased over the years. The trend of the ceramics sanitary ware industry has been increasing every year.

The supply chain is crucial to this sector and without proper raw material supply; companies cannot keep up with quality and quantity production targets. There is no standards conformance control at the source (regional mines) from where the clay is excavated. Therefore, major concern of businesses is the product quality which requires a consistent category of raw materials, skilled workers and more advanced manufacturing technology.

Although human resource is considered in abundance, the industry faces difficulties in acquiring and retaining a well trained workforce. Normally, skills are traditionally passed on by imitation and informal on-the-job training. Most of the production workers are only semi-skilled with little to now theoretical trade knowledge. The owner usually deals with management issues and marketing related activities. Glazing supervisor, body supervisor, kiln supervisor, designing or moulding in-charge and accountants are considered middle level management and are mostly experienced persons or ceramics diploma holders. More than 5,000 persons are employed in the Gujranwala cluster of the ceramics industry.

The industry is represented by PCMA, which provides services to its ceramics sanitary ware and pottery stakeholders.

More details are provided in Sector Chart 3.3.

Light Engineering/Metal Fabrication Gujranwala

Sector Overview

Being a large industrial city, Gujranwala is playing a major role in the economic development of Pakistan. A large number of small and medium industrial units operate in the area and the wide range of light engineering goods cover electrical equipment, transport equipment, domestic appliances, telecommunication equipment, electric fans, steel and aluminium fabrication, machines and machine parts. The main products of the domestic electrical goods produced in the cluster are: Fan (all types), Washing Machine, Spin Dryer, Room Air Cooler, Stabilizer, Tube Light Fitting, Electric Heater, Electric Geyser, and Electric Oven.

Gujranwala's light engineering cluster fulfils the requirements for machinery spare parts of almost all kind of industries in Pakistan. Recent product diversification moved from pure metal based engineering to plastics and composites, showing the industries readiness to adapt to new situations and demands. The cluster's efforts have been effective in import substitution of commodities, machinery and spare parts.

The light engineering industry mainly exists at the level of SMEs, except for some firms which have gained a remarkable growth and national and international recognition. The industry is not only fulfilling the domestic needs but also exporting small quantities of engineering products with high export potential to Middle East, Africa and Central Asia. This economic sector is highly vender (sub-contractor, supplier) based. Basically, no manufacturing unit in Gujranwala exists in which all the parts are manufactured and assembled in-house. Each vender is usually specialized in manufacturing one part only. The industrial establishments have limited capability to design, test and experiment on new machines and products.

Human resource development will be one of the key issues to be addressed by the industry and the TVET system. The Gujranwala Chamber of Commerce and Industry has started round table meetings with the academe of Gujranwala Universities in order to discuss industry's demand and develop appropriate training modules.

More details are provided in Sector Chart 3.4.

Light Engineering Surgical Instruments

Sector Overview

The surgical instruments industry is mainly clustered in and around Sialkot. Over 99 percent of the countries production is centred in this region. The sector comprises over 3,000 companies, of which around 30 can be considered in large category and the rest can be split as 150 units of medium sized and remaining as small. The larger companies have an up to 90 percent integrated production system whereas smaller units depend on external services like drop forging and heat treatment. Most of the larger and medium sized firms are directly exporting. Smaller units/vendors usually supply to commercial exporters/ traders.

The industry produces on average over 150 million pieces a year with an estimated value of around Rs. 22 billion. Out of the total production, approximately over 95 percent is exported. The industry belongs to the light engineering industry category and has specialised in highly skilled production processes with a stable export market share. Sialkot's surgical goods industry is responsible for 75 percent of Pakistan's engineering exports. It produces over 2,000 different instruments, mostly made from imported stainless steel. With a 20 percent share of the total world surgical goods exports, surgical instruments made in Sialkot are used by surgeons, dentists, and veterinarians throughout the world.

The surgical instrument industry of Pakistan is labor intensive due to lack of automated technology and therefore, needs high level of hand skills and precision. The total workforce of surgical instrument industry is 45,000-50,000 which represents the third or fourth generation of skilled

workers. Up till now, the skill of manufacturing surgical instrument is transferred from one generation to another and provides the conventional skills level used in the production. This is the main reason that the industry has only grown in and around Sialkot. However, a higher and more versatile trained workforce is required in future and the companies are aware of the issue.

More details are provided in Sector Chart 3.5.

Manufacturing/Sports Goods

Sector Overview

Sialkot is the hub of sports goods manufacturing in Pakistan with product segments of inflatable balls, gloves and protective gears, wooden products, composite-based products and sportswear. The value chain includes marketing and export companies, raw material suppliers, and production units and parts vendors/suppliers. Pakistan exported sports goods of USD 364 million in 2013-14 and exports have grown at an average rate of 3.3 percent per annum during the last three years. The majority of manufacturers are engaged in the production of inflatable balls, sportswear and sports gloves, others produce items like cricket bats, hockey sticks, rackets, cricket balls, hockey balls, tennis balls, protective gears and exercise and gymnastic equipment, etc.

More than 2,500 establishments are engaged in the production and export of sports goods in this sector. These include formal units, informal cottage units, part makers/suppliers and home based occasional producers. Among these firms, the number of manufacturing units which are engaged in regular and consistent manufacturing throughout the year can be estimated at 1,500.

The regular manufacturing units are highly labour intensive and a workforce of around 100,000 people are directly employed by the cluster out of which 60,000 are specifically engaged in manufacturing of inflatable balls. Sialkot caters to around 70 percent of total world demand of hand and machine stitched inflatable balls which translate into around 60 million balls annually. Besides the manufacturing units, hundreds of stitching centres and service providers (generally called makers) exist in and around the city that are approached by the manufacturers for outsourcing their jobs. These are usually cottage set ups and are run from homes and small shops.

More details are provided in Sector Chart 3.6 and 3.8

Service Sector/Logistics (Freight Forwarding & Warehousing), Customer Service

Sector Overview

The international freight forwarding industry is classified in the transportation (sea, air, road and rail), storage and communication segments of the services sector. According to the economic survey of Pakistan, these three sectors combined had the second biggest share of GDP at 13.7

percent in 2013. The industry has also registered a growth of 3percent last year and provides employment to approximately 1.5 million people (directly and indirectly).

About 95 percent of the total freight cargo is moved by road, three percent by rail and the remaining by air. Perishable items such as meat, fruits, medicines and certain medical and surgical equipment are imported and exported by air. However, all goods which are to be shipped or landed by sea are transported to and from Karachi by road. An estimated number of 3.5 million trucks are used in Pakistan for the transportation of cargo.

The freight forwarding industry comprises of about 4,000 firms out of which 500 are registered with the PIFFA. The total freight cargo being handled in Pakistan is approximately 250 million tons, out of which approximately 36 million tons is export tonnage. Pakistan's domestic logistics sector is ranked fourth largest in Asia. As per data provided by PIFFA, Karachi, Lahore, Sialkot and Faisalabad have the highest number of companies servicing the industry. Freight forwarders engage trucking companies for delivery of cargo to container freight stations or ware houses.

More details are provided in Sector Chart 3.7.

Construction Sector/Industry/Housing

Sector Overview

The construction industry is an important sector of the economy and has multiple backward and forward linkages with other sectors. The industry contributes significantly to socio-economic development and employment. The activities of the industry are significant to achieve the national development goals through the provision of infrastructure. The construction industry generates substantial employment and provides growth to other sectors such as sanitary, electronics, cement, steel, paints, furniture, and marble. This industry supports investment and growth climate and helps reduce poverty by generating income opportunities for poor households. According to the Economic Survey of Pakistan the construction sector contributed 2.7 percent to Pakistan's GDP, having 5.4 percent annual growth and employed 5.6 percent of the total employed labour force.

The construction sector has the largest scope for expansion and generating employment. An employment elasticity of 0.98 and largest links with other industries is an indication of high growth and employment potential of the sector. The industrial linkages include bricks, cement, steel, paints, varnishes, electricity cables and fittings, sanitary ware, tiles, mining (construction stones, marbles and other ceramic materials), electronics, household appliances and other construction material industries.

This industry is already on rise due to growing infrastructure activities. Significant reduction in interest, electricity, oil and coal prices will promote further and add value to this sector. Overall, stance of 2016 for said sector is progressive as all the liberation actions for developers and builders would give essential boost to the multi-billion dollar industry.

This sector is one of the privileged sector in Pakistan which has received major aid in the Federal Budget of 2015-2016. For this particular industry, government has exempted the bricks and

crushed-stones from Sales Tax till June 30, 2018. Additionally, Custom Duty on the import of landfill trucks, concrete placing trucks crane lorries, truck mounted lorries, mobile canal lining equipment and transit miners which are listed with SECP and the Pakistan Engineering Council attained from construction companies, is decreased from 30 to 20 percent.

According to statistics, there is an annual deficiency of 270,000-housing-units. The Prime-Minister has launched housing schemes for government employees under the policy of 'Housing for All'. Many measures and policies are formulated to encourage the construction- activities. Massive investments are driving in from global investors from UAE- China-Singapore-Malaysia etc. who have dedicated USD 43 billion. They are also accomplishing housing-projects in Lahore, Gawadar, DHA Islamabad and Karachi. The infra-structure construction projects in the country comprise a large-number of roads, highways, flyovers, underpasses, dams, tunnels, and industrial projects which are backing to growth of this sector.

Pakistan is a developing country that is currently enjoying relatively strong growth in construction activities. Currently, construction is the second largest sector in Pakistan's economy after agriculture. Roughly 30-35 percent of employment is directly or indirectly affiliated with the construction sector. This sector in Pakistan has played a vital role in providing jobs and facilitating revival of the economy.

Hospitality and Tourism

In Pakistan, Hospitality Sector contains a wide exhibit of businesses from transport services to cafés/restaurants that take into account needs of visitors. Accordingly, lodgings are likewise viewed as a key income producing fragment in Pakistan. According to the research direct contribution of travel and tourism sector (including hotels) represented 3.3% of Pakistan's total GDP in 2016. The Hospitality sector primarily provides lodging services to clients alongside a variety of other supplementary services for example, transportation, dining and event management.

Punjab has the most noteworthy number of vacation destinations, it additionally creates larger part of the tourism income for the nation. As a result, demand for hotels is highest in Punjab followed by Khyber Pakhtunkhwa and Sindh.

Sector Overview

Pakistan's Travel & Tourism industry directly generated around 1,429,500 jobs in the country, in 2015. This mainly entailed employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services).

It can also be attributed to the activities of the restaurant and leisure industries directly supported by tourists. It is predicted that by 2025, the Travel & Tourism industry of Pakistan will account for 1,760,000 jobs directly, an increase of 2.1% pa over the next ten years.

The Travel & Tourism investment in 2015 was PKR 342.8 Bn (USD 3272 Mn). This comprised 9.3% of the total investment. It is expected to rise by 7.6% pa over the next ten years.

In 2016, the hotel occupancy increased upto 80% as opposed to 35% in 2015. Gwadar is leading the way for new hotel construction with permits issued for least 5 new 5-star hotels so far in the new port city. In 2016, Gwadar Airport witnessed a growth of 73% which was the fastest of all airports in Pakistan.

Leisure travel spending (inbound and domestic) generated 84.9% of direct Travel & Tourism GDP in 2015 (PKR1,056.0bn) compared with 15.1% for business travel spending (PKR187.6bn).

Business travel spending is expected to grow by 6.5% in 2016 to PKR199.9bn(USD 1908 mn), and rise by 5.6% pa to PKR343.4bn (USD 3277 mn) in 2026. Leisure travel spending on the other hand is expected to grow by 2.7% in 2016 to PKR1,084.8bn (USD 10.3 Bn), and rise by 5.4% pa to PKR1,839.8bn (USD 17.6 Bn) in 2026⁹.

Some of the top tourist destinations in the country include Naran; Kaghan, Murree and Nathiagali. Business travel spending is expected to grow by 6.5% in 2016 to PKR199.9bn(USD 1908 mn), and rise by 5.6% pa to PKR343.4bn (USD 3277 mn) in 2026. Leisure travel spending on the other hand is expected to grow by 2.7% in 2016 to PKR1,084.8bn (USD 10.3 Bn) , and rise by 5.4% pa to PKR1,839.8bn (USD 17.6 Bn) in 2026. Karachi, Lahore, and Islamabad are major tourists destinations, well-known for destinations for business travelling.

In the next 5 years, at least 10 new hotels are expected to be established by world's renowned hotel chains. These include renowned players of the industry such as Hashoo Group, Grand Hayatt, and Sheraton which have all planned expansion in the upcoming years.

⁹ Source: Walled city of Lahore Authority

List of sector charts 3.1 – 3.10

Chart 3.1: Textile/Readymade garments (woven, knitted)

| Geographical Area Cluster Location | Sector/Subsector | Rational | Trades/Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|---------------------------------------|--|--|---|--|---|--|
| Lahore Faisalabad | Textile/Readymade garments (woven) | Largest subsector of textile industry; 38% of total workforce; 60% share in export; Labour intensive production Constant requirements NVQF 1, 2, 3. Garments sector has comparatively stable exports as compared to the other exports sectors | Industrial stitching machine operator Stitching machine mechanic Apparel Supervisor Pattern drafting & cutting CAD/ CAM pattern design Quality control & QA Planning & production control Knitting machine operator Machine & hand embroidery Computerized industrial embroidery Professional garment washing | Approx. 133.000 persons /next 5 years spread over different levels. High demand: Industrial stitching machine operator (28 % of total requirement). Stitching machine mechanic (15 % of total requirement). | Pakistan Readymade Garments Association , Lahore | Pakistan Readymade Garments Technical Training Institute, Lahore (officially linked to PREGMEA) |
| | Textile/Readymade garments (knitted) | | | | Pakistan Hosiery Manufactures & Exporters Association | Pakistan Knitwear Training Institute , Lahore (PKTI is attached to PHME) National Textile University , Faisalabad |
| Key potentials /strength: | Garments is one of the potential sectors that requires a large number of workforce due to industry's dependence on labour intensive manufacturing processes and it will continue in the near future i.e. next 5 years According to the Government's Trade Policy 2003-04, three Garment Cities were setup in Karachi, Lahore and Faisalabad. These projects have been incorporated into companies based on the public private partnership model. There will be demand of work-force at all levels with the emergence of new companies in the textile cities. The existing companies will also requires workers due to expansion and increase in their business volumes | | | | | |
| Key weaknesses /risks | Workers' turnover and the remuneration of workers on "piece rate basis" are two factors that should be considered while designing future interventions for the garments sector. | | | | | |
| Other remarks: | Focus group discussions need to be carried out with the sector associations for development of concrete and tangible project proposals. Other trades include: Computerized Industrial Embroidery, Pattern Making & Cutting, Garment Washing Techniques, Quality Control & QA, Merchandizing Management, Fashion & Design, Production Planning & Control | | | | | |
| CBTA qualifications available | Textile Trades: | NVQF 2: Dress Making; Knitting Machine Operator; Pattern Drafting & Grading, Computer Operator, Office Assistant; | | | | |
| | Maintenance Technology: | NVQF 3: Textile/Fashion Designing, Web Designing & Development; NVQF 2: Heat, Ventilation & Air-conditioning (HVAC); Industrial Electricity; Home Appliance Technician; NVQF 3: Mechatronics Technician; NVQF 1-3; Building Electricity; NVQF 4: E-commerce NVQF 5: Energy Efficiency Advisor. | | | | |

Chart 3.2: Light Engineering / Auto parts

| Geographical Area Cluster Location | Sector / Subsector | Rational | Trades/ Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|------------------------------------|--|---|--|---|---|---|
| Lahore | Light engineering / Auto Parts Cars and Light Commercial Vehicles (LCVs) Motorcycle part Parts for Two Wheelers Three Wheelers Tractor Parts Parts for Trucks and Buses Parts for After Sales Market | Rapid change in technology requires better qualified workforce. Conventional systems are changing to computer aided systems. Market size has increased tremendously requiring increase production volume. Traditional on-the-job training only is insufficient. Technology up-gradation requires adequate employees; NVQF Level 1–6 | Whole range of metal working and electrical trade, which includes: Machine tool operators, Black smith Bench fitter Welders CNC operators PLC technicians Industrial electrician CAD/CAM technician Product Designer Present CVT courses can continue as well. | Sector-wide employment < 200.000 employees; An estimated requirement: 50.000 persons over the next three to five years. Major skills need: Tools dies and moulds 12.8% Sheet Metal 20.5% Metal Casting 11.8% Metal Forging 14.7% Rubber/Plastic Parts 17.6% Electronics/Electrical Parts 13.1% Assembly 13.2% Store keeping 17.1% | Pakistan Association of Automotive Parts & Accessories Manufacturers, Lahore Lahore Chamber of Commerce and Industry | TEVTA Training Facilities Apprenticeship Training Centre Punjab Vocational Training Council DESCON Technical Institute , Lahore University of Engineering & Technology University College of Engineering & Emerging Technologies Punjab University Institute of Quality & Technology Management Usman Institute of Engineering and Technology University of Management Technology |
| Key potentials/ strengths: | Concentration of companies within the vicinity of two cities i.e. Karachi and Lahore Sector has a potential to absorb new technologies Sector generates economic activity in forward linkages including retail/wholesale dealerships, logistic, auto workshops, filling stations, finance and insurance | | | | | |
| Key weaknesses/ risks: | Auto-parts sector is dependent on labour intensive technologies; however, due to the increasing shift towards automation, a large number of workers at lower levels (NVQF L1 and L2) will be jobless if not qualified Auto-parts is highly dependent on the automotive sector, new policies, change in the output of the automotive, overall economic situation have diverse effects on the auto-parts sector | | | | | |
| Other remarks: | Sector can be considered for the next phase of the project due to its high demand for the workforce as well as continuous appetite for the latest machinery /technologies A more focused TNA need to be carried out with the sector associations for development of concrete and tangible project proposals | | | | | |
| CBTA packages: available | NVQF 2: Welding; Heat, Ventilation & Air-conditioning; Automobile Mechanics, Auto Electrician; Machinist; Electro Mechanical Technology, Electrical Equipment | | | | | |

Installation & Repair, Welding and Fabricator, Computer Operator, Office Assistant.
 NVQF 3: Auto CAD; Automotive Technician; Mechanical Manufacturing; Mechatronic Technician, Electronics Technician; CAD/CAM Operator
 NVQF 5: Energy Efficiency Advisor

Chart 3.3 Manufacturing /Ceramics Industry

| Geographical Area Cluster Location | Sector /Subsector | Rational | Trades/Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|------------------------------------|--|--|--|---|--|---|
| Gujranwala | Manufacturing / ceramics industry Electric Insulators Sanitary ware Tiles Tableware Refractory/ fire, insulation bricks) | Facing acute shortage of skilled workforce. Traditional on-the -job training needs to be upgraded Higher skills und multi-tasking required. Shortage of qualified mid management level HR | Production workers Glazing supervisor, Body supervisor, Kiln supervisor, Designing or moulding in-charge Plant and equipment maintenance technician | Total workforce <5.000 mainly in NVQF level 1-3. Especially skilled production workers are needed: 500–800 persons/ annum. Increased need of qualified middle management level personnel; NVQF 4-6 | Pakistan Ceramics Manufacturing Association , Gujranwala Supported by: Gujranwala Chamber of Commerce and Industry. | Ceramics Development & Training Complex , Gujranwala. (officially linked to PCMA) |
| Key potentials/ strengths: | Growing industry with high employment potentials at skilled worker level. NVQF 1-3. Industry has realized to improve production methods and product quality by using higher skilled workforce and more modern production facilities. | | | | | |
| Key weaknesses / risks: | Increasing competition from China (better quality at lower prices) can be a challenge if not addressed appropriately. | | | | | |
| CBTA packages available: | NVQF 2: Computer Operator; Office Assistant: NVQF 2: Heat, Ventilation & Air-conditioning; Machinist; Electro Mechanical Technology, Electrical Equipment Installation & Repair, Welding and Fabricator; NVQF 3: Auto CAD; Mechatronic Technician, Electronics Technician; CAD/CAM Operator NVQF 5: Energy Efficiency Advisor | | | | | |

Chart 3.4 Light Engineering / Metal Fabrication

| Geographical Area Cluster Location | Sector / Subsector | Rational | Trades/Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|------------------------------------|--|---|--|---|--|--|
| Gujranwala | <p>Light engineering / Metal fabrication</p> <p>A large number of small and medium industrial units are operating in Gujranwala.</p> <p>The range of light engineering goods covers electrical goods, transport equipment, industry and domestic appliances, telecommunication equipment, etc.</p> | <p>Important SME-based industry sector to support domestic demand and serving the export-oriented industry.</p> <p>Changing technology and need for increased productivity.</p> <p>Mainly semi-skilled and on-the job trained persons are insufficiently qualified in future.</p> <p>Low R&D for product innovation.</p> <p>Lack of quality controls.</p> | <p>Whole range of metal working and electrical trades which includes:</p> <p>Machine tool operators, Sheet metal worker Electrician Foundry workers Bench fitter Welders CNC operators PLC technicians Industrial electrician CAD/CAM technician Product designer Computer aided product/pattern designer Dies and moulds technician</p> | <p>Further details supplied in final report and subject to industry-based assessments.</p> <p>Reported annual requirement of trained metal working labour force is approx. 500–800 persons.</p> | Gujranwala Chamber of Commerce and Industry (GCCCI). Gujranwala | <p>TEVET Institutions, Gujranwala Light Engineering Services Centre , Gujranwala.</p> <p>Apprenticeship Training Centre , Gujranwala Gujranwala Tools, Die and Moulds Centre , Relevant Engineering Universities & Technical Colleges.</p> |
| Key potentials/ strengths: | <p>Important light engineering supply to the domestic market. Raising demand on machinery, machinery parts and of electrical home appliances</p> <p>Good support of institutional infrastructure</p> <p>Large export potential in electrical home appliances in Middle East, Africa and Central Asia.</p> | | | | | |
| Key weaknesses/ risks: | <p>The involvement of technology in manufacturing processes is still quite low.</p> <p>Many of the units are at micro and small level about and may be difficult to reach.</p> | | | | | |
| CBTA packages available | <p>NVQF 2: Welding; Heat, Ventilation & Air-conditioning; Machinist; Electro Mechanical Technology, Electrical Equipment Installation & Repair, Welding and Fabricator,</p> <p>NVQF: Computer Operator, Office Assistant.</p> <p>NVQF 3: Auto CAD; Automotive Technician; Mechanical Manufacturing; Mechatronic Technician, Electronics Technician; CAD/ CAM Operator</p> <p>NVQF 5: Energy Efficiency Advisor</p> | | | | | |

Chart 3.5: Light Engineering / Surgical Instruments

| Geographical Area Cluster Location | Sector / Subsector | Rational | Trades/ Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|------------------------------------|---|--|--|---|---|---|
| Sialkot | Light engineering / Surgical Instruments | Key sector for exports (95 % of production; Rs. 22 billion/annum). Stable export market share. 36,00 companies /50,000 employees; Labour intensive production methods; High skills requirements at all production stages; Critical shortage of skilled and trained workforce. | Grinders Polishers Filers Fitters Tool. dies & mould makers Machinists Machine operators Accountants, Merchandising / export documentation | Projected are 3.300 persons over next five years; Annual requirements approx. 500–800 trained workers mainly grinders, polishers, fitters, etc. which constitute the industries core production workforce. | Surgical Instruments Manufactures Association of Pakistan Approx. 1,300 active members. Sialkot | Metal Industries Development Centre , Sialkot Institute for Surgical Technology , Sialkot Government Apprenticeship Training Centre , Sialkot |
| Key potentials/ strengths: | A large concentration of companies at one city has made Sialkot a famous for the supply of quality products/surgical instruments Buying from Sialkot is cost effective due to the presence of a large number of manufacturers and competitive prices Industry’s reliance on labour intensive technologies provides employment opportunities to the population from Sialkot and adjoining districts Industry is Sialkot is generally progressive and forward looking due to its involvement in exports / international exposure | | | | | |
| Key weaknesses/ risks: | Surgical sector is highly dependent on labour intensive technologies, if there is a shift towards automation, a large number of workers at lower levels (NVQF L1 and L2) will be jobless | | | | | |
| Other remarks: | Surgical Instruments sector can be considered for the next phase of the project due to its high demand for the workforce as well as continuous appetite for the latest machinery /technologies Focus group discussions need to be carried out with the sector associations for development of concrete and tangible project proposals | | | | | |
| CBTA packages available | NVQF 2: Welding; Heat, Ventilation & Air-conditioning; Machinist; Electro Mechanical Technology, Electrical Equipment Installation & Repair, Welding and Fabricator; NVQF 2: Computer Operator, Office Assistant. NVQF 3: Auto CAD; Automotive Technician; Mechanical Manufacturing; Mechatronic Technician, Electronics Technician; CAD/CAM Operator NVQF 3: Call Centre Agent; Logistics & Supply Chain Assistant; Web Designing & Development; NVQF 4: E-commerce NVQF 5: Energy Efficiency Advisor | | | | | |

Chart 3.6: Manufacturing/Sports Goods

| Geographical Area Cluster Location | Sector / Subsector | Rational | Trades/Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|------------------------------------|--|---|--|--|--|---|
| Sialkot | <p>Manufacturing/ Sports goods</p> <p>Products range includes balls for soccer, volleyball, rugby, beach balls, exercise balls, cricket, hockey, baseball, tennis, shuttle cocks, nets, gloves, hockey sticks, cricket bats, baseball bates, protective guards, pads, sportswear, etc.</p> <p>Materials include; leather, synthetics, fabric, wood, compounds, etc.</p> | <p>Major industry and employment sector in Sialkot region (Worlds larges football industry).</p> <p>Sialkot caters more than 70% of total world demand for hand-stitched inflatable soccer balls.</p> <p>Pakistan’s main cluster of these industries and provides major export earnings.</p> <p>Skilled labour intensive work pattern.</p> <p>Constant openings for skilled worker.</p> <p>Increased skills upgrading needs and multi-tasking requirements.</p> | <p>Machine stitching operator</p> <p>Hand stitcher</p> <p>Pattern maker</p> <p>Cutter</p> <p>Pattern design and cutter</p> <p>Wood turners</p> <p>Wood workers</p> <p>Cutting and Screen printing</p> <p>Woodworkers for cricket bats, including jointers, samplers, polishers, blade shapers, handle makers</p> <p>Workers for composite based products including mould masters and tube machine operators</p> <p>Export Managers</p> <p>Plant & equipment maintenance technician</p> | <p>About 70.000 persons will be required in the next five years.</p> <p>65% the total required workforce will be that of stitchers of different products with following breakdown:</p> <p>Gloves, protective gear and sports-wear stitchers: 37%</p> <p>Inflatable balls Hand Stitchers: 20%</p> <p>Inflatable balls - Machine Stitchers: 7%</p> | <p>Pakistan Sports Goods Manufacturing & Exporters Association (PSGMEA), Sialkot</p> | <p>Sports Industry Development Centre (SIDC), Sialkot (officially linked to PSGMEA)</p> <p>Government Apprenticeship Training Centre (ATC), Sialkot</p> |
| Key potentials/ strengths: | <p>A large concentration of companies at one city has made Sialkot a famous for the supply of quality sports-goods.</p> <p>World’s only place to produce high quality hand stitched balls in bulk</p> <p>Buying from Sialkot is cost effective due to the presence of a large number of manufacturers and competitive prices</p> <p>Industry’s reliance on labour intensive technologies provides employment opportunities to the population from Sialkot and adjoining districts</p> <p>Industry in Sialkot is generally progressive and forward looking due to its involvement in exports / international exposure</p> | | | | | |
| Key weaknesses/ risks: | <p>Sports-goods sector especially football manufacturing is dependent on labour intensive production. Increasing usage of mechanized and thermo-bonded ball in international tournaments will make, a large number of workers currently involved in stitching, jobless</p> <p>Increasing competition, especially with China and India,</p> | | | | | |
| CBTA packages available | <p>NVQF 2: Heat, Ventilation & Air-conditioning; Machinist; Electro Mechanical Technology, Electrical Equipment Installation & Repair; Computer Operator, Office Assistant.</p> <p>NVQF 3: Auto CAD; Automotive Technician; Mechatronic Technician, Electronics Technician; CAD/CAM Operator, Call Centre Agent; Logistics & Supply Chain Assistant;</p> <p>NVQF 4: E-commerce</p> <p>NVQF 5: Energy Efficiency Advisor</p> | | | | | |

Chart 3.7: Services /Logistics, Customer Services

| Geographical Area Cluster Location | Sector/Subsector | Rational | Trades/Professions | Employment potentials | Business Membership Organisation(s) | Training establishments |
|--|---|--|---|---|---|--|
| Karachi Lahore Sialkot Faisalabad | Services/ Customer Service Logistics (Transportation, Communication and Storage) | The three sub-sectors (jointly referred as logistics) contributed 13.7% in the GDP of Pakistan. Provides a large number of direct and indirect employment. Sectors require a relatively higher educated workforce (NVQF L4, L5) at middle management position. | Trades/ skills required by the sector include: Loaders Drivers Green logistics management Custom house brokerage Dangerous goods packing and handling Safety and security management Sales agents Warranty handling & management (repair/ replacement shipment handling) Know-how of industry-relevant IT systems Diploma in Freight Forwarding | The subsector will require about 1,500 to 2,000 persons at the middle employment level over the next (mostly diploma holders) | Pakistan International Freight Forwarders Association | PIFFA Training Institute Karachi and Lahore Institutes being managed by the association itself Providing diploma level training in logistics and supply chain management |
| Key potentials/ strengths: | Association (PIFFA) has its own training institute that is catering to the HR requirements of the sector Association has made it mandatory for the organisations to either train two existing members or employ diploma holders of the institute to obtain membership New freight forwarding / supply chain companies / ware-houses will emerge and more jobs will be created with China Pakistan Economic Corridor Diploma Programme offered by the association is on modular basis | | | | | |
| Key weaknesses/ risks: | Diploma Programme is currently being offered at two cities i.e. Karachi and Lahore which may not be enough to cater to the needs of the industries at Sialkot, Faisalabad and other cities | | | | | |
| Other remarks: | Sector can be considered for the next phase of the project due to its high demand for the workforce at the middle management levels PIFFA is willing to participate with the project | | | | | |
| CBTA qualifications available | NVQF 2: Computer Operator; Office Assistant, Customer Service & Sales Assistant; NVQF 3: Call Centre Agent; Logistics & Supply Chain Assistant; NVQF 4: E-commerce | | | | | |

Chart 3.8: Textile/ Leather Sport Goods, Leather Sport Wear

| Geographical Area Cluster Location | Sector / Subsector | Rational | Trades/Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|--------------------------------------|--|---|---|--|--|---|
| Sialkot | Textile/ Gloves and Leather ware Wide range of Industrial and sports gloves, motorcycle leather ware, martial arts supply, protective gear, etc. | Leather products export of Pakistan is around US \$ 1 billion; Sialkot accounts for US \$ 450 million (45 % of the country's overall exports). High level quality export products require a trained and skilled workforce. Constant demand of trained production personal. High percentage of female employees | Machine stitching operators Gloves pattern design and making, Leather cutters Hand & machine embroiders Plant & equipment maintenance technicians | The sports goods industry Sialkot directly employs about 100,000 people. A breakdown for this sub sector is not available. According to the association, approx. 200 – 400 new workers/ annum are needed. | Pakistan Gloves Manufacturing & Exporters association (PGMEA), Sialkot | Leather Products Development Institute (LPDI), Sialkot (officially related to PGMEA). |
| Key potentials/ strengths: | The industry provides a large number of job openings for female employees. Pro-active attitude of companies to support pre-service training and qualification measures. | | | | | |
| Key weaknesses/ risks: | A gap exists in provision of training on technologies used in manufacturing of composite based sports goods, specialized stitching machines, design and pattern making, embroidery, etc. | | | | | |
| Other remarks: | The Leather Products Development Institute , Sialkot, is very well equipped and staffed. The training courses offered are demand-oriented meet relevant professional and pedagogical standards. | | | | | |
| CBTA Qualifications available | Leather trades: NVQF 2: Shoe Laster; Dress Making, Knitting Machine Operator; Pattern Drafting & Grading; NVQF 3: Textile/Fashion Designing; Maintenance Technology: NVQF 2: Heat, Ventilation & Air-conditioning (HVAC); Industrial Electricity; Electrical Equipment Installation & Repair; Electro Mechanical Technology. NVQF 3: Mechatronics Technician; NVQF 1-3; Building Electricity, NVQF 5: Energy Efficiency Advisor | | | | | |

Chart 3.9: Construction/ Housing

| Geographical Area Cluster Location | Sector /Subsector | Rational | Trades/ Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|---|--|---|---|--|---------------------------------------|--|
| Lahore, Faisalabad, Gujranwala, Sialkot, Rawalpindi | Construction / Housing | The construction industry generates substantial employment and provides growth to other sectors such as sanitary, electronics, cement, steel, paints, furniture, and marble. According to the Economic Survey of Pakistan the construction sector contributed 2.7 percent to Pakistan's GDP, shown 5.4 percent annual growth and employed 5.6 percent of the total employed labour force. | Masonry, Carpenters, Plumbing, Tile Fixers, Building Electricians, False Ceiling and Timber Flooring, Scaffolding workers | An employment elasticity of 0.98 and largest links with other industries is an indication of high growth and employment potential of the sector. About 115,000 new skilled labour is required in different professions/trades. | Constructors Association of Pakistan. | Construction Technology Training Institute , Rawalpindi. |
| Key potentials/ strengths: | The industry provides a large number of job openings for male employees. Huge demand in overseas market specially gulf region. Expo 2020, Football World cup, Qatar An estimated 270,000 housing units are demanded annually but the supply is only of 150,000 units. | | | | | |
| Key weaknesses/ risks: | Inadequately trained workforce together with low quality inputs and lack of sufficient training facilities are affecting the quality of construction. | | | | | |
| Other remarks: | Sector can be considered for the next phase of the project due to its high demand for the workforce as well as continuous appetite for the latest machinery/ technologies Focus group discussions need to be carried out with the sector associations to further expedite relevant areas. | | | | | |
| CBTA qualifications available | Trades: NVQF 2: Construction Technology (general electrician) | | | | | |

Chart 3.10: Hospitality/Travel and Tourism Sector

| Geographical Area Cluster Location | Sector / Subsector | Rational | Trades/Profession | Employment potentials | Business Membership Organisation | Training Establishment |
|--|---|--|---|---|----------------------------------|------------------------|
| Lahore/Faisalabad/Gujranwala, Sialkot, Rawalpindi | Services/Hospitality/ travel and tourism, hotel management | In Pakistan, Hospitality Sector contains a wide exhibit of businesses from transport services to cafés/restaurants that take into account needs of visitors. Accordingly, lodgings are likewise viewed as a key income producing fragment in Pakistan. The Hospitality sector primarily provides lodging services to clients alongside a variety of other supplementary services for example, transportation, dining and event management. | Hotel management, hotel operations, health and food safety, caterers, tourist guides, butlers, interpreters, Cook, sous chef, waiters, housekeeping, food and beverages, junior chef, | This sector is global and one of the biggest employers in the world. Out of every 100 people, 10 are employed in the hospitality sector. But there is an immense shortage of skilled workers in the field, creating numerous employment opportunities annually for ambitious and career-oriented people across the world. | Hashoo Group, Grand Hayatt etc. | COTHM, |
| Key potentials/strengths: | The industry provides a large number of job openings especially for female employees. In the next 5 years, at least 10 new hotels are expected to be established by world’s renowned hotel chains. Expo 2020 is also creating a lot of opportunities in this sector. Hospitality and Tourism make one of the fastest growing industries across the world. | | | | | |
| Key weaknesses / risks: | There is an immense shortage of skilled workers in the field, creating numerous employment opportunities annually for ambitious and career-oriented people across the world. | | | | | |
| CBTA Qualifications available | Leather trades: | NVQF 2: Waiters, Cook NVQF 3: Food and beverages, Chef de Partie NVQF 4: Sous chef ; | | | | |
| | | | | | | |

Profiles of Identified Business Membership Organisations

Pakistan Hosiery Manufacturers & Exporters Association

| Item | Details |
|---|--|
| Name | Pakistan Hosiery Manufacturers & Exporters Association |
| Address/ Headquarter | PHMA House, 37-H, Block-6, P.E.C.H.S., Karachi Tel: +92-2134544789, 34522685, 34522769 Secretary General +92-21-34545683, 34544764 Email: secretary.general@phmaonline.com , info@phmaonline.com Webpage: www.phmaonline.com |
| Key contact/ focal person (s) | Mr. Irfan Z. Bawanay, Central Chairman Mr. Adil Butt, Chairman Northern Zone Mr. Mohammad Riaz Ahmed, Chairman Southern Zone |
| Organisational form | Non-profit organisation–Industrial Sector Association |
| Legal status | Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association |
| PHMA Zonal/ Sub Offices | Central Zone (Karachi) Southern Zone (Karachi) Northern Zone (Lahore) Regional Office Northern Zone (Faisalabad) Regional Office Northern Zone (Sialkot) |
| Brief history, founding year, etc. | Pakistan Hosiery Manufacturers & Exporters Association is the premier trade organization representing the hosiery and knitwear sector. Its history dates back to the year 1960 when PHMA was established by a few dedicated industrialists and leading manufacturers of hosiery & knitwear. It was registered with the ministry of commerce under section 26 of the companies act 1913 on the 7th day of July 1960 and incorporated under the companies act 1913 on the 31st day of August 1960. The hosiery sector comprises 3,500 large, medium and small unit, 85% of which are small enterprises, 10% medium ventures and only 5% large integrated factories. The industry sustains directly, livelihood of 210,000 skilled workers and their families; 490,000 unskilled workers and families. Another 350,000 people benefit in allied cottage industries, thus the industry provides directly and indirectly sustenance to well over a million people. |
| Purpose | The association was established with an aim to promote, develop, protect, stimulate and encourage the hosiery, knitwear and all made-ups, fabrics, home textile products of cotton, wool, silk or man-made fibers and to raise the standard of their production and enhance exports |
| Financing mechanisms | Membership Fee, donations from industries |
| Technical Support Cell | PHMA in Collaboration with bfz GmbH-International Division established a Technical Support Cell. The purpose of establishing TSC is to provide sustainable, reliable and affordable services related to energy, environment and engineering aspects of the member companies. TSC at Karachi is responsible to undertake the activities in following domains: Technical Testing Energy Efficiency & Management Productivity Improvement Environmental Management Training and Capacity Development of industry professionals |
| Pakistan Knitwear Training Institute, Lahore | Pakistan Knitwear Training Institute is a public private partnership project by Ministry of Textile Industry, Government of Pakistan and PHMA to produce trained manpower for the knitwear garments industry. Since 1994, PKTI has been imparting training in all areas of knitwear garments manufacturing. Its trainees, including a large number of female, are proving their worth in different areas of knitwear garments sector. |

Pakistan Readymade Garments Manufacturers and Exporters Association

| Item | Details |
|--|--|
| Name | Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA) |
| Address / Headquarter | PRGMEA House 3rd Floor, Plot No. 57-C, 24th Commercial Street, Phase II (Ext), DHA, Karachi, Pakistan Tel : (+92) -21- 35890651-2 Fax : (+92)- 21 - 35890653 Email: info@prgmra.org Webpage: www.prgmea.org |
| Key contact/ focal person (s) | Mr. Ijaz A. Khokhar, Central Chairman Mr. Jawwad A. Chaudhry, Chairman North Zone Mr. Amir Lakhani, Chairman South Zone |
| Organisational form | Non-profit organisation – Industrial Sector Association |
| Legal status | Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association |
| PHMA Zonal/ Sub Offices | Central Zone (Karachi) South Zone (Karachi) North Zone (Lahore) Sialkot Sub-office) |
| Brief history, founding year, etc. | PRGMEA is the premier trade organization representing the Readymade Garment Industry in Pakistan. PRGMEA was established in 1981 to provide advice and services to manufacturers and exporters and to promote a better environment for trade |
| Purpose | PRGMEA was established with a mission to provide advice and services to manufacturers and exporters of garments and to promote a better environment for trade. The objectives are: To advise, protect, safeguard and promote the rights, interests of members and to assure their goodwill To provide supporting services to members To monitor export performance and provide related information and market knowledge to members To encourage exports by advocating for a better export environment and by removing difficulties and short comings in the ready-made garments trade, through continuous interaction with concerned bodies and institutions |
| Financing mechanisms | Membership Fee, donations from industries |
| Technical Support Cell | PRGMEA in Collaboration with bfz GmbH-International Division established a Technical Support Cell. The purpose of establishing TSC is to provide sustainable, reliable and affordable services related to energy, environment and engineering aspects of the member companies. TSC at Karachi is responsible to undertake the activities in following domains: Technical Testing Energy Efficiency & Management Productivity Improvement Environmental Management Training and Capacity Development of industry professionals |
| Pakistan Ready-Made Garments Technical Training Institute | PRGTTI is a public private partnership project of Ministry of Textile Industry, Government of Pakistan and PRGMEA to produce trained manpower for the ready-made garments industry. |

Surgical Instruments Manufacturers Association of Pakistan

| Item | Details | |
|---|---|---|
| Name | Surgical Instruments Manufacturers Association of Pakistan | |
| Address/ Headquarter | Near Sublime Chowk, Marala Road, Sialkot, Pakistan. Tel: +92 52 3554890, +92 52 3563014, Fax: 92 52 3554217 Email: info@simap.org.pk Webpage: www.simap.org.pk | |
| Key contact/ focal person (s) | Mr. Jehangeer Babar Bajwa Chairman SIMAP Tel: 0300-8610722 Fax: 052-4588777 Email: chairman@simap.org.pk | Ms. Iram Zafar Secretary General Tel: 052-3554890, 3563014 Fax: 052-3554217 Email: info@simap.org.pk |
| Organisational form | Non-profit organisation – Industrial Sector Association | |
| Legal status | Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association | |
| Surgical Industry | Surgical Industry of Pakistan holds a history of more than 100 years when the British doctors received their surgical instruments repaired from the skilled workers of Sialkot, which laid the foundation of Sialkot Surgical Industry. The Surgical Industry represents manufacturers and exporters of Surgical Instruments, Electro Medical Instruments, Body External Fixation Systems and Implants, Micro Surgery Instruments, Cardiovascular Instruments, Endoscopic and Gynaecological Instruments, ENT Instruments, Respiratory Aid Instruments, Orthopaedic Instruments, Holloware, Anaesthesia Products, Hospital Furniture, Dental Instruments, Veterinary Instruments, Personal Beauty care Items and Beauty Saloon instruments. | |
| Brief history, founding year, etc. | The Surgical Instruments Manufacturers Association of Pakistan was established in 1958. Surgical Association has 3,600 member firms more than 150,000 workers are grossly engaged in manufacturing of Surgical Instruments to meet the export commitments in the International Market. The value of exports of surgical instruments for the financial year 2015-2016 is USD 358 Million. | |
| Purpose | The association was established with an aim to protect and promote the art of surgical instruments manufacturing and to help solving the problems of surgical manufacturing community. Association is providing following services to its members: Issuance of visa recommendatory letters Documents attestation Trade delegations Market Information international exhibitions, trade leads etc. Mediator for solving trade disputes between local and international companies Material testing | |
| Financing mechanisms | Membership Fee, donations from industries. | |
| Sialkot Material Testing Laboratory | Sialkot Material Testing Laboratory was established in year 2001 under the supervision, guidance and initiative of FDA, USA. The project is being jointly managed by Trade Development Authority of Pakistan & Surgical Instrument Manufacturers Association of Pakistan (SIMAP). | |
| Institute for Surgical Technology, Sialkot | The laboratory is equipped with modern, sophisticated and Hi-Tech testing equipment in order to conforming made in Sialkot medical instruments to the International standard specifications and provision of consultancy to the manufacturers and exporters to improve the manufacturing techniques and processes of medical instruments. IST is newly constructed on the premises of the Metal Industries Development Centre Sialkot servicing as well to the industry. IST has a modern and spacious building and shall be the future training and service centre for the surgical instrument industry of Sialkot. According to the MIDC management, the equipment is currently under procurement procedures with PTEVTA. | |

Pakistan Sports Goods Manufacturers and Exporters Association (PSGMEA)

| Item | Details | |
|---|---|--|
| Name | Pakistan Sports Goods Manufacturers and Exporters Association | |
| Address/ Headquarter | 60/ A Hali Road, Small Industrial Estate, Sialkot-Pakistan Tel:- +92-52-3256930,45 Fax: +92-52-3256920 E-mail: psgmea@gmail.com , psgmea@psgmea.org.pk Website: www.psgmea.org.pk | |
| Key contact / focal person(s) | Mr. Khurram Aslam Butt Chairman PSGMEA Tel:- +92-52-3256930,45 Fax: +92-52-3256920 E-mail: psgmea@psgmea.org.pk | Mr. Mohsin Masood Secretary General Tel:- +92-52-3256945 Cell: +92-322- 732 1413 Fax: +92-52-3256920 E-mail: psgmea@psgmea.org.pk , psgmea@gmail.com |
| Organisational form | Non-profit organisation – Industrial Sector Association | |
| Legal status | Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association | |
| Sports Goods Industry | <p>The foundations of the industry were laid down in 1918 when the first football supplied by a British Army personnel, was re-stitched in Sialkot followed by its local production by a local artisan Sayed Sahib. He pioneered the production of Footballs in his own small manufacturing unit. In 1922, Sayed Sahib, was awarded first Export Award from the British Empire for his outstanding venture to supply (Export) footballs to British Army camped in Singapore.</p> <p>Today there are more than 2,500 establishments engaged in the production and export of sports goods. These include formal units, informal cottage units, makers/ vendors and home based occasional producers involved in the production of inflatable balls, sportswear and sports gloves, cricket bats, hockey sticks, rackets, cricket balls, hockey balls, tennis balls, protective gears and exercise and gymnastic equipment, etc.</p> | |
| Brief history, founding year, etc. | In order to facilitate the exporters of sports goods and sports wears the high ups of the industry managed to form an Association to represent the exporters of various sports goods and sports wears at Sialkot. This Association was established in the year 1945. | |
| Purpose | <p>The association was established with an aim to help solving the problems of sports goods manufacturing community. Currently the association is providing following services to its members:</p> <p>Issuance of visa recommendatory letters Documents attestation Job portal Market Information international exhibitions, trade leads etc.</p> | |
| Financing mechanisms | Membership Fee, donations from industries | |

Pakistan Gloves Manufacturers and Exporters Association

| Item | Details | | |
|---|--|---|--|
| Name | Pakistan Gloves Manufacturers and Exporters Association (PGMEA) | | |
| Address/ Headquarter | PGMEA Building, Kashmir Road, , Sialkot, Pakistan. Tel: + +92-52-4273870 / 4272959, Fax: +92-52-4274860 Email: pgmea@brain.net.pk / pgmea_skt@yahoo.com Webpage: www.pgmea.org.pk | | |
| Key contact/ focal person (s) | <table border="0"> <tr> <td>Mr. Sohail Masood Chairman PGMEA Tel: + +92-52-4273870 / 4272959, Fax: +92-52-4274860 Email: pgmea@brain.net.pk / sohail.1959@gmail.com</td> <td>Mr. Muhammad Asghar Mughal Secretary General Tel: + +92-52-4273870 / 4272959, Fax: +92-52-4274860 Email: pgmea@brain.net.pk / pgmea_skt@yahoo.com</td> </tr> </table> | Mr. Sohail Masood Chairman PGMEA Tel: + +92-52-4273870 / 4272959, Fax: +92-52-4274860 Email: pgmea@brain.net.pk / sohail.1959@gmail.com | Mr. Muhammad Asghar Mughal Secretary General Tel: + +92-52-4273870 / 4272959, Fax: +92-52-4274860 Email: pgmea@brain.net.pk / pgmea_skt@yahoo.com |
| Mr. Sohail Masood Chairman PGMEA Tel: + +92-52-4273870 / 4272959, Fax: +92-52-4274860 Email: pgmea@brain.net.pk / sohail.1959@gmail.com | Mr. Muhammad Asghar Mughal Secretary General Tel: + +92-52-4273870 / 4272959, Fax: +92-52-4274860 Email: pgmea@brain.net.pk / pgmea_skt@yahoo.com | | |
| Organisational form | Non-profit organisation – Industrial Sector Association | | |
| Legal status | Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association | | |
| Gloves Manufacturing | <p>The history of gloves industry is connected with the introduction of Cricket game resulting the manufacturing of Cricket bat in Sialkot that necessitated for the “batting gloves”, “wicket keeper gloves” and “inner gloves”. The production of gloves did not restrict to Cricket, but during 2nd world war more variety of gloves was introduced for markets like baseball gloves – and later during 1956 the gloves for winter sports, Ice-hockey, Ski, were progressively introduced by the artisans of Sialkot. With the increase in demand in international market, and the increase of manufacturing units of gloves, Sialkot became the Centre of Gloves Manufacturing. Today all kinds of gloves including, Sports Gloves, Motor-bike Gloves, Cycling Gloves, Boxing Gloves, Winter Gloves, Fashion Gloves, Industrial and Labour Gloves and many more are produced in Sialkot.</p> <p>Currently five hundred SMEs hundreds of skilled/ semi-skilled manpower are involved in manufacturing of gloves and leather wear.</p> | | |
| Brief history, founding year, etc. | Pakistan Gloves Manufacturers and Exporters Association, Sialkot was established in December 1978 as a licensed trade body and later affiliated with Federation of Pakistan Chambers of Commerce & Industry | | |
| Purpose | <p>The association was established with the aim to stimulate the development of gloves manufacturing sector mainly for exports</p> <p>Currently PGMEA is providing following services to its members:</p> <ul style="list-style-type: none"> Issuance of visa recommendatory letters Documents attestation Issuance of certificate of origin Market Information international exhibitions, trade leads etc. Information about standards, compliance and Testing services Operating LPDI + CPC (see below) | | |
| Financing mechanisms | Membership Fee, donations from industries | | |
| Leather Products development institute | LPDI is a training institute established by PGMEA with the aim to produce skilled manpower for leather products, specifically gloves. The Institute is equipped to provide training for pattern making, hand and machine stitching, pattern cutting and draping, management courses and tailor made modules demanded by companies. LPDI has trained around 500 workers who are employed in the industry for gloves / garments manufacturing. | | |
| Cleaner Production Centre | CPC was established to control indiscriminate discharge of potentially harmful waste and to improve working condition in the tanneries with the introduction of Cleaner Production techniques. CPC is also running internationally accredited laboratory that provides analytical and physical testing services. CPC is also providing trainings related to international Standards on quality control, social compliances, occupational safety and health. The CPC project was financed by Royal Norwegian Government. | | |

Pakistan International Freight Forwarders Association (PIFFA)

| Item | Details | |
|---|--|---|
| Name | Pakistan International Freight Forwarders Association (PIFFA) | |
| Address/ Headquarter | 257-C, Block-6, P.E.C.H.S. Karachi-75400, Pakistan Tel: + 92 21 343 22671-3 Fax: + 92 21 343 22670 Email: piffa@piffapk.com URL: www.piffapk.com | |
| Key contact/ focal person (s) | Mr. Muhammad Ilyas Chairman PIFFA Tel: + 92 21 343 22671-3 Fax: + 92 21 343 22670 Email: piffa@piffapk.com | Mr. Habibullah A. Latif Secretary General Tel: + 92 21 343 22671-3 Fax: + 92 21 343 22670 Email: piffa@piffapk.com |
| Organisational form | Non-profit organisation – Industrial Sector Association | |
| Legal status | Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association | |
| Members | PIFFA has more than 500 Freight Forwarding Companies as Members. | |
| Brief history, founding year, etc. | PIFFA was established in 2005 and became the sole representative body of Pakistan Freight Forwarders. PIFFA is representing more than 500 companies providing Land, Air, Ocean Combined Transport and other Logistics services. | |
| Purpose | <p>PIFFA aims to provide effective representation and support for Pakistan freight services industry to observe the highest standards of professional competence.</p> <p>The Association aims to achieve standardization in the industry and to promote a high degree of professional conduct among its members, including ethics and financial viability.</p> <p>The role of the association includes support for the Pakistan trade worldwide, the development and the maintenance of healthy international freight services industry within Pakistan.</p> | |
| Financing mechanisms | Membership Fee, donations | |
| PIFFA - FIATA Diploma in Freight Forwarding | PIFFA is offering a diploma in freight forwarding that has been validated by FIATA based in Zurich, Switzerland. This PIFFA Diploma allows the holder to seek employment in Freight Forwarding Industry. | |
| Other Remarks | Association is successfully running trainings at its own institute in Lahore and Karachi | |

Pakistan Association of Automotive Parts and Accessories Manufacturers

| Item | Details | |
|---|--|---|
| Name | Pakistan Association of Automotive Parts and Accessories Manufacturers | |
| Address/ Headquarter | PAAPAM Head Office 16-B, Westwood Colony, Thokar Niaz Baig, Lahore. Tel # +92-42-37498474-5 Fax #+92-42-37498476 Website: www.paapam.com | |
| Key contact/ focal person (s) | <p>Mr. Mashood Ali Khan Chairman PAAPAM South Office 204, 2nd Floor, Suleman Center, SC-5, ST-17, Sector 15, Korangi Industrial Area, Karachi, Pakistan Tel # +92-21-35113841, Fax # +92-21-35113842 E-mail: chairman@paapam.com</p> | <p>Mr. Saeed Iqbal Ahmed Khan Sr. Vice Chairman Add: PAAPAM Head Office 16-B, Westwood Colony, Thokar Niaz Baig, Lahore, Pakistan Tel # +92-42-37498474-5 Fax #+92-42-37498476 E-mail: s.vicechairman@paapam.com</p> |
| Organisational form | Non-profit organisation – Industrial Sector Association | |
| Legal status | Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association | |
| Auto-Parts industry | <p>The automotive assembling in Pakistan started in 1950 when National Motors Limited was established in Karachi. The city became the hub of automobile assembling plants which laid the foundation of Auto Parts Manufacturing Industry in Pakistan. Initially, the focus of auto parts industry was in Karachi but gradually it also shifted towards Lahore. Currently Lahore auto parts cluster is the second largest hub for auto parts manufacturing after Karachi and catering almost 50% of auto parts demands of assemblers and after markets.</p> <p>The first auto part manufacturing unit was established in Lahore 1942 for after sales market. The initial focus of auto parts manufacturing units established in 1950s, 1960s and 1970s were limited to tractors, buses & truck parts as well as catering the need of after sales market of different automobiles. Major advancement in the industry took place during the 80's when Suzuki commenced production in Pakistan. After that, other assemblers of cars and motorcycles were also established. Overall, 80s and 90s are the decade when Lahore auto parts cluster started to develop rapidly.</p> <p>About 750 establishments are registered under the sector: 100 large, 200 SME and 450 smaller units focusing on after sales market only.</p> <p>Employment generated numbers to about 220,000 people.</p> | |
| Brief history, founding year, etc. | PAAPAM was formed in 1988 to represent the industry and to provide technical & management support to its members. The Association achieved recognition from the Government of Pakistan in 1999. PAAPAM has 1,200 members who are producing parts of Cars, Motorcycles, Tractors, Trucks and Buses. | |
| Purpose | <p>PAAPAM's mission is to build a competitive edge in the local automotive parts industry by maximizing local content and by creating an environment which is conducive to innovation & rapid modernization and is in sync with latest Research and Development.</p> <p>The association has become an effective link between the policy-makers in the government and the auto parts manufacturing industry.</p> <p>PAAPAM provides information to its members about the international exhibitions, marketing opportunities etc. and arranges an international exhibition in Pakistan called "International Auto Show" on regular basis, also arranges delegates of the member industries for international trade exhibitions</p> | |
| Financing mechanisms | Membership Fee, donations from industries | |

Gujranwala Chamber of Commerce and Industry (GCCCI)

| Item | Details | |
|--------------------------------------|---|--|
| Name | Gujranwala Chamber of Commerce and Industry, | |
| Address/ Headquarter | Aiwan-e-Tijarat Road, Gujranwala, Pakistan T +92-55-9200391 E gcci@gcci.org.pk W www.gcci.org.pk | |
| Key contact/ focal person (s) | Saheed Ahmad Taj President T +92-55-9200391-4 E gcci@gcci.org.pk | Muhammad Burhan Secretary General T +92-55-9200391-4 E burhan@gcci.org.pk |
| Organisational form | GCCCI is established as non-profit service oriented Joint Stock Company limited by guarantee that offers the services to its members. It is committed to make an effective contribution to the nation's economic development through the promotion of trade and industry. GCCCI also acts as a bridge between the government and the business community. | |
| Legal status | GCCCI is duly incorporated under Companies Ordinance and licensed 1978 | |
| Chapters/ Affiliation | Affiliation: Federation of Pakistan Chamber of Commerce & Industry . | |
| Members | GCCCI has two classes of membership: <i>Direct Members</i> and <i>Town Associations</i> . Currently the Chamber has a total of around 5000 members. | |
| Purpose | <p>GCCCI serves as a platform for trade & commerce community and its basic aim is to act as a bridge to resolve the problems relating to commerce & industry by becoming a voice of the community.</p> <p>GCCCI is working for the development and growth of commerce & industry in Gujranwala. For the achievement of its objectives, GCCCI is trying to serve and solve problems of its members effectively and in the best possible way.</p> <p>GCCCI promotes the Business of Small and Medium scale companies and establish a strong liaison between Chambers, banks & Government departments.</p> | |
| Management | <p>The Chamber is headed by the President and two Vice Presidents supported by the executive committee.</p> <p>The Secretary General is responsible for the chambers operation.</p> | |
| Financing | Membership dues, donations, subscriptions, | |
| Services | Advocacy and representation; Registration of businesses; Certificate of Origin; Attestations; Membership Support: Custom, GST, Import/Export, Banking, Visa Recommendations; Trade & Business Development; Business start-up; Research: marketing, product development, searching buyers, vendors, manufacturers; PR and promotion: Chamber Magazine; Trade Fairs & Exhibitions, Trade Delegations, International Linkages, etc. | |
| History | Before the establishment of GCCCI, an association named Gujranwala Association of Trade and Industry was functioning in Gujranwala observing the business interest of the traders and of the city. During that time GATI was affiliated with Lahore Chamber of Commerce & Industry . | |

Sialkot Chamber of Commerce and Industry (SCCI)

| Item | Details | |
|--------------------------------------|--|--|
| Name | Sialkot Chamber of Commerce and Industry, | |
| Address/ Headquarter | Shahrah-e-Aiwan-e-Sanat-o-Tijarat, / Paris Road, P.O. Box 1870, Sialkot City 51310 - Pakistan Email: sialkot@scci.com.pk Phone: +92-52-4261881-3 Fax: +92-52-4268835 / 4267919 Web: http://scci.com.pk | |
| Key contact/ focal person (s) | Majid Raza Bhutta, President Phone: +92-52-4264877 Fax: +92-52-4268835 E-mail: sialkot@scci.com.pk | Adnan Arshad Sethi, Senior Vice President Phone: +92-52-4273851 Fax: +92-52-4268835 E-mail : sialkot@scci.com.pk |
| Organisational form | The Sialkot Chamber of Commerce and Industry is the premier trade body representing the export oriented industry of Sialkot. The Chamber was established in 1982 under section 3 of the Trade Organization Ordinance, 1961 as a not-for profit organization. | |
| Legal status | SCCI was incorporated under Companies Act, 1913 vide License No. 24 dated July 15, 1982. | |
| Chapters/ Affiliation | Affiliation: <u>Federation of Pakistan Chamber of Commerce & Industry</u> on August 17, 1982. | |
| Members | The chamber has more than 8,000 members and four classes of memberships: Corporate Members, Associate Members, Town Associations, Delegate Members. About 3,000 are corporate members (i.e. bigger companies, industries registered with SEC and 5,000 are associate members (i.e. SMEs, sole proprietorships, partnership firms, associations, etc.). | |
| Purpose | Engage in activities to promote aid, develop, stimulate trade and protect the economic interest of Pakistan in general and in particular for those who are engaged in Sialkot in trade industry and services. Advising government on legislative measures, adjust controversies between members of the Chamber, collect and circulate statistics and other information relating to trade industry and services; arbitrate in settlement of disputes. To communicate with the Chambers of Commerce & Industry or public bodies within or outside Pakistan to promote measures for the protection of trade industry and services and the labour engaged therein. | |
| Management | The Chamber is headed by the President and two Vice Presidents supported by the executive committee. SCCI has formed 36 Standing Committees and delegated responsibilities to attend to specific Member/ Industry and community related issues. The Secretary General is responsible for the chambers operation. | |
| Financing | Membership dues, donations, subscriptions, publications, promotion activities. | |
| Services | Advocacy and representation; registration of businesses; certificate of origin; attestations. Membership Support: custom, GST, import/ export, banking, visa recommendations; trade & business development; business start-up. Research: marketing, product development, searching buyers, vendors, manufacturers, sector / industry assessments. PR and promotion: chamber magazine; trade fairs & exhibitions, trade delegations, international linkages, etc. | |
| History | A Sialkot Association of Trade and Industry was formed in 1976 which was affiliated with Lahore Chamber of Commerce and Industry. It was decided to transform the existing Association into a Chamber of Commerce and Industry and the Association adopted the necessary resolution in the meeting held on December 12, 1979 and approached the Ministry of Commerce. | |

Conclusion and Recommendations

1. The sectors and subsectors identified in Punjab are in line with Government policies, EU Programme documents of TVET III and the selection criteria developed.
2. All sectors/sub sectors listed are facing the challenge of increased national and international competition and the need to raise their level of productivity and quality. Although, the newer production methods and technologies are often required; companies are reluctant to spend larger amounts on capital investment. Hence they are keen to have the skilled and qualified workforce.
3. The employment potentials assessed by the industries related studies and reported during factory visits and meetings with associations and chambers seems to be reasonable and realistic. The requirements include the normal fluctuation but are mainly due to the sectors' growth and constitute additional employment opportunities. Respondents show interest in Work-based training programmes and the need to upgrade the existing workforce was repeatedly stated by the employers, however, reluctance to participate in such trainings may be experienced from the employees.
4. Most of the possible employment opportunities assessed in this mission are related to NVQF level 1-3. Considerably a less demand exists in mid-level positions related to NVQF level 4-6 in the manufacturing industry. A different scenario is noticeable in service-related trades like logistics, freight forwarding, banking, insurance, etc. where mostly college and university graduates are employed.
5. The discussions highlighted that in manufacturing industry, mid-level and higher management positions are not being promoted by potential persons from lower ranks to upwards. Main reason stated was the low educational background of semi-skilled and skilled workers at the entry level of their career. Consequently, mid and higher level positions are filled with college and university graduates having (i) little exposure and experience of related work practice and (ii) require a long internship/ orientation period of 1–2 years to take up their tasks. It is recommended to study the possibility of designing cooperative study programmes of NVQF level 5 – 7.
6. All relevant trade associations and chambers were visited for briefing on TVET III Programme; these organisations were interested for participative involvement in the Programme. The contacted organisations have a strong membership base and are vibrant and active. However, human resource development issues and related organisational setups and programmes are not yet focused by these organizations. A few have special committees related to HR & talent development. Capacity building and awareness is empirical with respect to the amount of workforce required (NVQF 1–3).
7. Most trade association have a direct access and responsibility for a common service and training facility. Such establishments were setup by related line ministries and turned over to be managed by the association. The training and service facilities visited are generally sufficiently equipped and staffed but some may need capacity building programmes regarding training organisation and implementation.
8. The usual set-up of those common service and training facilities resemble larger industrial production systems to be used by the companies to augment their own production cycle without heavy investment costs. However, many companies have meanwhile installed their own machinery which is 10 to 20 years old, the equipment is often outdated and sometimes very costly to use for training purposes only. It is recommended to have a careful equipment audit and assessment in cooperation with the respective association to modernise the concept, equipment and use for the current and future demand of the industry. Depending on the training courses selected, CBTA/CVT related equipment, tools and supplies might be needed in any case as well as linked teacher and instructor training.

Two training centres need to be mentioned directly:

Government Institute of Leather Technology, Gujranwala

At present, the institute was selected to provide theory classes for the six-months CVT course setup with the Pakistan Footwear Manufacturers Association, Lahore. A careful assessment needs to be made, if GILT shall be included in the training programmes for the footwear and leather industry identified in this report.

Institute for Surgical Technology, Sialkot

The Institute is newly constructed on the premises of the Metal Industries Development Centre, Sialkot. It is a modern and spacious building and shall be the future training and service centre for the surgical instrument industry of Sialkot. According to the MIDC management, the equipment is at present under procurement procedures with PTEVTA. Since, IST will be a major partner to implement the industry's training requirements, it might be advisable to seek contact with TEVTA in order to synchronize equipment and supplies with trade-related curricula, especially CBT&A courses.

Priority Recommendations

Sectors with high employment potentials, supportive business membership organisations, adequate training facilities and availability of CBTA, CVT training courses are ranked as follows:

- Light Engineering / Auto parts, Lahore
- Textile / Readymade Garments, Lahore, Faisalabad
- Light Engineering / Metal Fabrication, Gujranwala
- Light Engineering / Surgical Instruments, Sialkot
- Textile / Leather Goods, Leather Wear, Sialkot
- Services / Logistics, Customer Service, Lahore

Way Forward

Chambers

Many approaches were adopted to conduct this study. Positive discussions were held with the President, Vice President, Office bearers, Secretary General and senior level representatives of Chambers in Gujranwala and Sialkot. The officials of said organizations were enthusiastic and interested to interact with the Programme.

Due to the huge export industry, the **Sialkot Chamber** appears to be strong and powerful in addressing issues and providing services to its members and wider community. Besides its normal activity, the Chamber has successfully spearheaded and implemented a number of projects and infrastructure developments.

Sialkot Business and Commerce Centre is a joint project of Sialkot Chamber and SMEDA, with cost estimate of PKR. 341.67 million. Chamber has contributed PKR. 170 million in shape of a plot for construction of the Centre and PKR. 20 million for civil works, while, balance amount of PKR. 171.67 million is being provided by the Federal Government. The multistoried building would serve as Display and Convention Centre and other commercial activities.



Sports Industry Development Centre

Sialkot has been the leading player in the world football market over the past many years. However, this crucial advantage is going through doldrums due to the emergence of mechanized ball technology capturing the export market quickly. To overcome these issues in future, the Sialkot Chamber joined hands with SMEDA to set up the project of Sports Industry Development Centre, with cost of PKR. 272 million. Adoption to the new technology will enable Sialkot to maintain its prominent position in the football exports. Funding for the project is being provided by the Federal Government.



Sialkot City Package

In a unique move, Sialkot City Package Programme was initiated in 1999 by the Sialkot Chamber in collaboration with the all trade bodies in Sialkot. The Programme was based on the principle of matching grant by the Federal and Punjab Governments with 1:1 and 1:3, respectively. Under the Programme the exporters of Sialkot voluntarily contributed 0.25 percent against their export invoices for improvement of road infrastructure in the city. An amount of PKR. 210 million was collected in the first phase. Under the scheme, Kashmir Road,



Defense Road, Shahabpura Road, Hajipura Road, Circular Road, and Paris Road were constructed. This improved road infrastructure was achieved under Sialkot City Package accomplished on Self-help basis by the business community.

Sialkot Export Processing Zone

Country's second Export Processing Zone has been set up at Sambrial, Sialkot on 238 acres with investment of Rs. 184 million generated through the private entrepreneurs opening a new era of Industrial revolution and foreign investment in the region.



Sialkot Tannery Zone

In order to overcome the threat of environmental pollution being created by the scattered tanneries in and around Sialkot, the Chamber has initiated the project of Sialkot Tannery Zone. The Government has issued notification under Section 4 of land acquisition Act 1894 for acquisition of 384 Acres at Khambran Wala at Kuluwal Road for the establishment of Tannery Zone. For the completion of the Project in private sector, a non-profit organization by the name of The Sialkot Tannery Association (Guarantee) Ltd. has been formed. The Company invited applications from prospective buyers for submission of 25 percent share of the total cost of land. The amount has been transferred to the Local Government for the acquisition of land; the development process is expected to start very soon. Fitted with a modern affluent treatment plant, all the tanneries are advised to shift to this zone.



Sialkot International Airport

Sialkot International Airport is a mega project in Private Sector and first of its kind in South Asia. In order to meet the demand of buyers and exporters, the energetic and highly motivated business community of Sialkot signed a Memorandum of Understanding with Ministry of Defense through Civil Aviation Authority in 2003. The promoters from private sector were invited to join the mega project and a public limited company namely Sialkot International Airport Ltd (SIAL) was formed and registered. The Airport will speed up the transportation of export cargo by air and would facilitate a two way travel of businessmen and overseas Pakistanis of this region.



Sialkot Dry Port Trust

Sialkot Dry Port Trust was established in 1984 by 52 reputed exporters/businessmen of Sialkot. They have earned the unique honor of being the pioneers for establishing the first ever Dry Port in Asia in the private sector. The main aim of this Dry Port



was to provide the facility of Customs Clearance to the exporters and importers of this region at their door step.

Seerat Study Centre

In March 1976, an international Seerat Conference was held at Karachi with the participation of reputed Ulema and religious scholars of the Muslim World. The conference unanimously adopted to establish an Academic forum of International level for the study and research on the life (Seerat-e-Tayyaba) of the Holy Prophet (S.A.W). The decision was formally approved by the participants of International Seerat Conference Islamabad in November 1985 and the forum was named Seerat Study Centre. The Sialkot Chamber took the initiative and established the Seerat Study Centre in Sialkot. This forum is located on Ghazi Road, Sialkot Cantt.



Sialkot Transport Company

The chamber employs HR officer who is engaged in HR activities. However, the trade-related skill and professional training is handled by the respective trade associations. The Senior Vice President mentioned during his visit that the chamber faces issues of improving their membership services especially when it comes to adequate workforce supply and development. The chamber has a quite capable R&D department but requires capacity development in professionally design and implement training TNA for member companies or on sub-sector level.

Recommendation

- Follow-up meetings need to be scheduled to further discuss the mode and level of interaction with TVET III.
- The level of engagement of Chamber is required to be identified in detail for training measures of NVQF 1–3.
- Identification and confirmation of the respective trade associations as the prime partners.
- The Chamber is willing to assess its capacity building needs to professionalise the interaction with the TVET system.
- R&D department shall be supported to conduct TNA as a membership service and provide possible input to the TVET system.

The membership of the **Gujranwala Chamber** is much different from Sialkot region and consists, with some exceptions, mainly of SMEs catering for the domestic market. However, the economic activities are substantial and important to the country and the Chamber addresses the particular needs of the business sector at large. The Chamber's operation is mainly directed towards the conventional activities of chamber in Pakistan in which human resource development is not yet considered as a routine activity of a chamber.

However, the President recently started round table meetings with the representatives of Gujranwala Universities and Colleges in order to have closer relationships and develop and deliver demand-oriented training programmes. He appeared very much interested to include

GCCI into the TVET III programme and sees this as an opportunity to address the skilled worker issue facing the industry.

Likewise, he showed willingness to assess capacity building needs of the organisation to improve and widen membership services. Although the diversified Light Engineering sector in Gujranwala has several trade associations, the focal point for the intended cooperation should be the Chamber to start with.

Recommendation

- Follow-up meetings are required to be scheduled to further discuss the mode and level of interaction with TVET III.
- The Chamber is willing to assess its capacity building needs to improve and widen the membership services and explore the possibility of closer cooperation and interaction with the TVET system.
- The Chamber identified immediate skills training needs in aluminium and steel fabrication. The chamber will act as the focal point for other demand-oriented training needs.

Associations

The team visited eight pre-selected trade associations and held meetings with senior office bearers and secretary generals. Although professionally different, the associations are quite similar and can be grouped together and dealt in more generic terms. The organisations represent members of export-oriented businesses which are active in economical important sectors. The membership base is powerful and leadership is generally open-minded and pro-active. Most association own their quite impressive premises and employ professional staff. They are used to interact with international organisations, donor agencies and have implemented joint projects in the past; a few are operating at present.

Like the chambers, reluctance exists in dealing and interacting with formal TVET programmes and institutions. The internal functions do not have provisions and structures to systematically and regularly provide service to support human resource development needs. All associations have access to sector specific common service and training centres for which they share the management responsibilities. The service and training centres are mostly set-up with production-oriented equipment and less training-oriented facilities. In some cases, the production equipment was outdated or underutilized since companies installed their own machinery.

All associations were open to interact with the TVET III Programme and are looking forward to discuss about concrete steps and activities. The need to have a versatile (“multi-tasking”) trained workforce was mentioned by all associations to increase productivity, quality and flexibility. The associated service and training centres have different experiences in design, and conduct of initial trainings and up-gradation of training courses. In some cases, trainings were conceptualised and delivered very well; other centres have less experience to operate trainings of NVQF 1-3 as needed by the industry.

Recommendation

- Discussion and decision of the short-listed association and trades shall be included into the TVET III Programme.

- Follow-up meetings with selected associations should be scheduled to further discuss the mode and level of interaction with TVET III.
- All associations have indicated the need to improve and widen their membership service and are willing to assess their capacity building needs.
- Since the associations are quite powerful; awareness raising and capacity building should be provided to improve closer and formal employer-led cooperation and interaction with the TVET system.
- Management capacity building need exists on the level of the association to interact professionally and provide the expected management guidance to the common service and training centres.
- The common service and training centres often lack management skills to operate the centre effectively and efficiently and organise and implement training measures.
- In order to provide adequate skills training, technical and pedagogical training is required in all establishment identified to cooperate with the association and/or the programme.

Annexes

- TORs
- List of organisations/people consulted

Terms of Reference

Anlage 1:

PN: 09.2254.2-009.00

VN: 81206647

TVET Reform Support Programme

1. Brief information on the project:

The Technical and Vocational Education Training (TVET) Reform Support Programme in Pakistan is funded by the European Union, the Embassy of the Kingdom of the Netherlands, the Embassy of the Kingdom of Norway and the Federal Republic of Germany. It aims at improving access, equity and relevance of TVET in Pakistan.

The five-year programme has five components: 1) Improving TVET Governance and Institution Building, 2) National Qualifications Framework and Human Resource Development, 3) Fund for Innovative Training (FIT) and Labour Market Services, 4) Capacity-building for TEVTAs, and 5) Cooperative Training and Green Skills.

Component 5 "Cooperative Training and Green Skills" supports the introduction of cooperative training in Pakistan, in which training institutes and enterprises share responsibility for the vocational education of young people. The approach is based on the German Dual Training System and has been modified to match Pakistan's needs for the skilled workforce. The component, therefore, assists private and public training institutes, enterprises and provincial TVET authorities in Punjab and Sindh to implement commercial and technical courses together. The training scheme is named Cooperative Vocational Training (CVT).

So far, the component has supported the launching of ten cooperative training courses in Punjab and Sindh, in which ten training institutes and 125 enterprises have been involved. Among them are Machinist, Welding, Fabrication & Pipework, Electronics, Electrical Technology, Automotive, Mechatronics, Mechanical Manufacturing, Logistics & Supply Chain, Shoe Lasting Operations, and Customer services & Sales.

2. Context:

The CVT Handbook defines various models for the coordination and management of cooperative training courses. One of the proposed models is characterized through a partnership, in which the Technical Education and Vocational Training Authority (TEVTA) and private sector organizations are engaged. In this model the private sector organization defines the demand for a specific course and prepares member companies for delivering the on-the-job training, whereas the TVETA responds to the demand by organizing class-room lessons, preparing assessments and ensuring certification. This coordination model facilitates shared responsibility among the training partners and provides the possibility for the private sector to engage enterprises on a larger scale. In this way, the public-private partnership model enhances sustainability and connects TVET provision with the demand of the labour market. A pre-condition for the establishment of such a partnership is that chambers of commerce and industries and trade associations possess the required capacity to take over management tasks and closely coordinate the activities with the respective TEVTA, training institutes and enterprises.

The expert shall support the component in identifying economic sectors, in which CVT can be supported to link TVET provision with the labour market in the next phase (2017-2021). The sectors shall be characterized by a high employment potential, which

Terms of Reference

Anlage 1:

PN: 09.2254.2-009.00

VN: 81206647

can be addressed through TVET. Furthermore, the expert shall identify relevant business membership organizations, such as chambers of commerce and industries and trade associations, in the selected sectors, which have the capacity and mandate to perform the management and coordination roles for the development and delivery of further CVT qualifications in the next phase.

The expert is expected to collect and process data in the provinces of Punjab and Sindh. In this regard, he will visit Lahore, Sialkot, Faisalabad, Karachi, Hyderabad and Hub. He will be accompanied and supported by a national short term expert.

3. The contractor will perform the following services (*if the contract is for work and labour, please give details of the work results expected*):

Preparation:

- Prepare a workplan to carryout the assignment in close liaison with the component leader, the regional component leaders in Punjab and Sindh and a national shorterterm expert

Implementation:

- Develop and present the research approach for identifying relevant sectors and potential business membership organizations for CVT with technical staff of C5
- Carry out an in-depth sectoral study for the provinces Sindh and Baluchistan, identifying at least three economic subsectors with high employment potential, which can be addressed by CVT. The study shall consider the results of the programme's preliminary research.
- Identify at least 5 suitable business membership organizations in the identified economic sectors. These organizations should have a professional management structure and experience in skills development.
- Conduct needs analysis of the identified business membership organizations to gauge their capacity and readiness to perform management and coordination tasks of CVT. Specifically;
 - o Identify any current practices to address the skilled workforce needs of their member companies.
 - o An overview of the widely demanded skills-set and jobs in each sector/subsector.
 - o Information about their current capacity and priority areas e.g. political/social influence, engagement/influence with member companies, involvement in public-private partnerships/dialogues for TVET etc.
 - o Further capacity building needs to take over the planning, and coordination roles for TVET in general and CVT in particular.
- Propose a road map for each identified organisation for their potential involvement in planning and delivery of TVET on CVT approach

Terms of Reference

Anlage 1:

PN: 09.2254.2-009.00
VN: 81206647

- Keep a close liaison and synergies his work with the other national and international experts hired for sector studies and other cross-cutting assignments by GIZ and/or its subcontractors

Follow-up:

- Provide a separate sector analysis for each province, including description of relevant private sector organizations (not more than 15 pages)
- Provide needs analysis for each identified business membership organisation (not more than 3 pages per organisation)
- Provide road map, including recommendations for CVT related activities for each identified organization for the next phase of the TVET Reform Support Programme

4. Country of assignment: Pakistan

Annex 2

Working Schedule/STC Assignment W. F. Weidmann / TVET Reform Programme, Pakistan

Contract No.: 81206647; Project-No: 09.2254.2-009.00

Assignment schedule and activity report 30. October – 15. December 2016

Overall Schedule

| Place /Date | Item |
|--|---|
| 30.10. – 20.11.2016 Lahore | <i>Travel Kassel/Airport Frankfurt – Flight Frankfurt/Lahore</i> <i>Briefing, assignment preparation, field visits and meeting scheduling.</i> <i>Fact finding and field visits in cities and districts of Lahore, Gujranwala, Sialkot.</i> <i>Consultative meetings w/PTEVTA, Lahore Chamber of Commerce and Industry, Trade Associations and companies.</i> <i>Identification of sectors/subsectors and trades with job openings and employment potentials.</i> <i>Visit to relevant training and sector specific common service facilities.</i> <i>Travel Lahore/Karachi</i> |
| 21. – 26. 11 2016 Karachi | <i>Briefing, assignment preparation, field visits and meeting scheduling; editorial meetings and discussions “Sector Study Sindh”.</i> <i>Consultative meetings w/STEVTA, Karachi Chamber of Commerce and Industry, German Pakistan Chamber of Commerce and Industry; Trade Associations and companies.</i> <i>Travel to Germany</i> |
| 28.1. –15. 12. 2016 Home Office | <i>Follow-up skype meetings and activities; assignment documentation and completion; drafting and completing of Punjab and Sindh study reports.</i> |

Activities and Interactions

| 2016 | Activity |
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| 30. 10. | Travel to FRA Airport; flight to Lahore/Pakistan EK 046/624 |
| 31.10. | 12:00: GIZ TVET Support Programme, Regional Office, Lahore; Skype meeting ISB/LHE/KHI. Mission briefing; overall planning; WFW, ISTC; Muhammad Ali, NSTC. |
| 01.11. | 09:00 GIZ TVET Support Programme, C5 Regional Office, Lahore; Assignment planning and scheduling; discussion with Lahore staff; internal team meeting (TM); Desk research; document collection. Preparation and presentation of inception report. |
| 02.11. | 09:00 GIZ TVET Support Programme, C5 Regional Office, Lahore; Cont.: Internal team meeting (TM); finalizing preparation of inception report. Desk research; document study, etc. 14:00 h, 2 nd skype meeting ISB/LHE/KHI; |
| 03.11. | 09:00 GIZ TVET Support Programme, C5 Regional Office, Lahore Desk review, internal team meeting; document study; internet research. 12:30 Meeting w/KHI-Team (Kamran, Ahmar (NSTC). |
| 04.11. | 09:00 GIZ TVET Support Programme, C5 Regional Office, Lahore; Scheduling of field visits Sialkot, Gujranwala. Desk study, internet research. 15:00 GIZ Textile Project; Romina Kochius, TL 15:30 Shahid Rashid; REEE 17:00 RMO KHE briefing |

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| 05.11. | WE; PC work, documentation and notes. |
| 06.11. | WE |
| 07.11. | 09:00 GIZ TVET Support Programme, C5 Regional Office, Lahore; Review & finalise weekly programme; Office staff and STC-Team: Scheduling of appointments Document analysis; developing final report design and outline. |
| 08.11. | 09:00-13:00; GIZ TVET Support Programme, C5 Regional Office, Lahore; Internet research; document appraisal. 10:30 PTEVTA; Mr. Waheed; Director Apprenticeship; Mrs. Uzma Nadia; Dty. GM Placement Mrs. Amber Afzal Chatta, Manager Placement Mr. Khurram -Shahzad, Proj.-Director, MIDC, Sialkot Follow-up scheduling and appointments; logistics; 17:00 DESCON Ltd. Miam Asim Aziz; Human Resources Mr. Tauheed AkhtarRana, Corporate HR; Lead Talent & OD |
| 09.11. | 07:00 Leave for Gujranwala 09:00 Government Institute of Leather Technology (GILT); Mr. S.M. Ather Raza Zaidi, Project Director 10:30 Ceramics Development & Training Complex; Engr. Muhammad Arshad, CEO; Mr. Zubair Ahmed, GM Operation 12:45 Gujranwala Tool, Die & Mold Center; Mr. Muhammad Awais, CEO 15:00 Gujranwala Chamber of Commerce & Industry; Mr. Saeed Ahmad, Taj, President; Mr. Muhammad Burhan; Secretary General. |
| 10.11 | 07:00 Leave for Sialkot 10:00 Surgical Instruments Manufacturing Association of Pakistan (SIMAP); Mr. Johangeer Bajwa, Chairman; Mr. Shamin Ahmed, Vice President 11:30 Pakistan Garments Manufacturers & Exporters Association (PGMEA); Messrs. Arfan Elahi; Salagat Ali Khan; Naseer A. Malik; Office Bearer 12:30 Leather Products Development Institute (LPDI); Mr. Salman Tariq; Project Director 13:30 Pakistan Sports Goods Manufacturing and Exporters Association (PSGMEA); Messrs. Rama Sulaman; Khurram Azim Khan; Muhammad Ejaz Ghauree; Rana Naseer Ahmed; 14:30 Sialkot Chamber of Commerce and Industry (SCCI); Mr. Adnan Arshad Sethi, Senior Vice President; Office staff. 16:00 Sports Industry Development Centre (SIDC); Mr. Muhammad Sarwar Hanif; Project Director |
| 11.11. | 09:00 GIZ TVET Support Programme; C 5 Regional Office, Lahore Meeting w/C5 staff; team meeting; field visits review, assessment and documentation. |
| 12.11. | WE; PC work, documentation and notes. |
| 13.11. | WE |
| 14.11. | 09:00 GIZ TVET Support Programme, C 5 Regional Office, Lahore Weekly planning and appointment scheduling 10:30 CVT Steering Committee Meeting Meeting w/LCCI; PFMA; TEVTA; PEEFM; Logistics, Association Heads, etc. 15:00 Pakistan Readymade Garments Technical Training Institute (PRGTTI), Lahore; Dr. Kamran Yousef Sandha, Director Research |
| 15.11. | 09:00 GIZ TVET Support Programme 5 regional office, LHE Team meeting; consolidation and assessment of info and data 12:00 Shafi Reso Chemicals (SRC), Lahore Mr. Abrar Ahmed, Chef executive/CVT Chairman, Lahore Chamber of Commerce 14:00 Softwood Pvt. Ltd., Lahore; Textile factory / Readymade Garments Mr. Naveed Bashir, General Manager; Mr. Wasim Zaide, Production Manager. 16:00 DESCON Technical Institute, Lahore |

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| | Mr. Mirza Toheed Iqbal Baig, Head; Mr. Adil Mobashir, Head Academics |
| 16.11. | 07:00 Leave for Sialkot 10:00 Metal Industry Development Centre, (MIDC) Sialkot, Samar Ahmed, Chef Project Officer Institute for Surgical Technology, Sialkot. 11:30 Surgical Instruments Manufacturers Association of Pakistan (SIMAP), Mr. Mr. Shamim Ahmad, Vice President; Chairman HR Committee 11:45. Ekal Surgical Works, Sialkot, Mr. Abdul Jalil Bajawa; Chairman; Mr. Umar Zaman Bajwa, Production Director. 14:00 Pakistan Sports Goods Manufacturers & Exporter Association (PSGMEA) Mr. Khuram Aslam, Chairman; Mr. Mohsin Masood, Secretary General. 15:00 Kashmiry International, Martial Art Gear / Uniforms, Sialkot Mr. Mushtaq Ahmed Kashmiry, Managing Director 16:30 Start Return Trip; arrive 20:00. |
| 17.11 | 09:00 GIZ TVET Support Programme, C 5 Regional Office, Lahore Team meeting, data processing; follow-up pending matters; skype meeting w/ISB. Preparation of Karachi assignment; hotel reservation, ticketing/logistics; weekly programme, etc. |
| 18.11. | 09:00 GIZ TVET Support Programme, C 5 Regional Office, Lahore Finalising hotel reservation and logistics Karachi; email communication and documentation. Reflection, conclusion and wrap-up-activities Lahore assignment. Debriefing meeting w/office staff; Debriefing w/Romina K. Wrap-up activities; |
| 19.11. | Document/info review, appraisal and conclusions; notes & documentation. |
| 20.11. | PK 303, 11:00 – 13:00, flight to Karachi, check-in hotel. |
| 21.11. | 09:00 GIZ TVET Support Programme 5 Regional Office, KHI Discussion/reflection on Ahmar's Sindh Sector Study. 12:30 Assignment preparation, meeting/appointment scheduling 13:30 Skype briefing meeting w/ISB |
| 22.11. | 09:00 GIZ TVET Support Programme 5 Regional Office, KHI 10:00 STEVTA Mr. S.M. Kaleem Makki, Managing Director Mr. A Hafeez Abro, Industrial Coordination Mr. Nazir Channar, Director Operation 15:00 German Pakistan Chamber of Commerce & Industry (GPCCI); Mr. Ines Chabbi, CEO Mr. Ahmer Arif, Business Development Manager |
| 23.11. | 09:00 GIZ TVET Support Programme 5 Regional Office, KHI Desk review of reports, documents, materials, study report of Ahmar Iqbal, etc. 16:00 TAF Foundation Mr. Mustafa Bhaiwala, General Manager; Mrs. Erum Adnan, Chief of Staff |
| 24.11 | 09:00 Consulate General Karachi, Mr. Carsten Müller, Consul & Deputy Head of Mission Mrs. Shazia Shaikh, Trade & Economic Officer 10:30 Pakistan International Freight Forwarders Association (PIFFA), Mr. S. Kamran Ansari, Vice Chairman; Mr. Habib Ullah A. Latif, Secretary General 12:30 National Institute of Leather Technology (NILT); Meeting with: Pakistan Tannery Association + Pakistan Leather Garments Manufacturers & Exporters Association (PLGMEA) Mr. Aziz Ahmad, Chairman, PTA; Mr. Atif Ashraf, Chairman Central, PLEGMEA Mr. Rashid Arshad Zahur; Vice Chairman; NILT Mr. Tabish Habib Fareedi, Business Development Manager, NILT |

14:30 Karachi Chamber of Commerce and Industry (KCCI)
 Mr. Shamim Ahmed Firpo, President
 Mr. Asif Nisar, Senior Vice President
 Mr. Muhammad Younus Soomro, Vice President
 10 Office bearer of various committees and functions

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| 25.11 | <p>09:00 GIZ TVET Support Programme 5 Regional Office, KHI 10:30 GPCCI, follow-up visit, I. Chabbes, CEO 12:00 GIZ TVET Support Programme 5 Regional Office, KHI Reflection, conclusion and follow-up activities Karachi assignment. Debriefing meeting w/office staff; skype debriefing w/ISB Wrap-up activities.</p> |
| 26.11. | <p>Travel to Germany: 12:00, Flight EK 615 / EK 045; transfer Airport / Home.</p> |
| 28. Nov. – 15. Dec. | <p>Home Office, Kassel: Finalising documentation and report writing study mission Punjab. Work on Karachi documents + materials; internet research, follow-up skype sessions and document study analysis, appraisals and conclusions. Drafting and finalising findings and conclusions, preparation of charts and annexes, report writing.</p> |