



Study on

Producing Skilled Workforce for Potential Economic Sectors

in Sindh



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List of Acronyms

AAP	EU Annual Action Programme
ADO	Asian Development Outlook, ADB Document
BMI	Business Monitor International
CAD/CAM	Computer-aided Design / Computer-aided Manufacturing
CBT	Competency-based Training
CBT&A	Competency-based Training & Assessment
CNC	Computerised Numeric Control
CPC	Cleaner Production Centre
CPEC	China-Pakistan Economic Corridor
CVT	Cooperative Vocational Training
EU	European Union
FPCCI	Federation of Pakistan Chambers of Commerce and Industry
FY	Fiscal Year
GDP	Gross Domestic Product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GPCCI	German Pakistan Chamber of Commerce and Industry
GSP	Generalised Scheme of Preferences
HR	Human Resources
HRD	Human Resource Development
HVAC	Heating, ventilation and air conditioning
HYCCI	Hyderabad Chamber of Commerce and Industry
iACT	Institute for Advancing Careers and Talents
IBP	Institute of Bankers of Pakistan
ILO	International Labour Organisation
ISTC	International Short Term Consultant
LCCI	Lasbela Chamber of Commerce and Industry
LEUC	Light Engineering Upgradation Centre
LPDC	Leather Products Development Centre
NAVTTTC	National Vocational and Technical Training Commission
NSS	National Skills Strategy
NSTC	National Short Term Consultant
NVQF	National Vocational Qualification Framework
OICCI	Overseas Investors Chamber of Commerce and Industry
PAAPAM	Pakistan Association of Automotive Parts and Accessories Manufacturers

PAPGAI	Pakistan Association of Printing and Graphic Arts Industry
PBA	Pakistan Banks' Association
PHA	Pakistan Hotel 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
PLGMEA	Pakistan Leather Garments Manufacturers & Exporters Association
PPP	Purchasing Power Parity
PRGMEA	Pakistan Readymade Garments Manufacturers & Exporters Association
PRGTTI	Pakistan Readymade Garments Technical Training Institute
PSDC	Pakistan Skills Development Centre
SEC	Securities and Exchange Commission
SMARTI	SMA Rizvi Training Institute
SME	Small and Medium Enterprises
SSC	Sector Selection Criteria
STC	Short Term Consultancy
STEVTA	Sindh Technical Education and Vocational Training Authority
TAF	The Asia Foundation
TEVTA	Technical Education and Vocational Training Authority
TMA	Towel Manufacturers Association
TNA	Training Needs Analysis
TOR	Terms of Reference
ToT	Training of Trainers
TSSP	TVET Sector Support Programme
TUSDEC	Technology Upgradation and Skills Development Company
TVET	Technical Vocational Education and Training
TVET III	Support to the Technical and Vocational Education and Training Sector in Pakistan, Phase III
UNDP	United Nation Development Programme
USD	US Dollar
VET	Vocational Education and Training

Executive Summary

A sector/sub sector identification mission was carried out in November 2016 to provide inputs to the Technical and Vocational Education and Training (TVET) Reform Support Programme (TVET III) for defining future interventions. Related to the cities of Karachi and Hyderabad, economic sectors and trades showing high employment potentials and the related business membership organisations and training facilities were identified.

The first five-year phase of the TVET sector reform in Pakistan has ended in December 2016. During the last five years, a number of milestones have been achieved as far as overhauling the existing TVET system is concerned.

The second five-year phase of the TVET Sector Support Programme (TVET III), which has started in January 2017, is built on the groundwork, policies and accomplishment of the earlier phase taking the reform to the next development stage, provide wider access to adequate vocational training and aiming at higher involvement of chambers, trade associations and private sector business establishments taking responsibilities in forming and implementing TVET activities.

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

Sector/subsector selection criteria included:

- Priority in the governments' socio-economic development plans (federal/ provincial)
- High employability potentials: preferable local demand; overseas employment may be included if concrete demands shown
- Balance of industrial and artisan trades
- Availability of information and materials to identify possible skills gaps
- Trades and professions covered by accessible CBT&A curricula and packages
- Possibility to identify capable business organisations (chambers, associations, etc.)
- Possibility to identify relevant and potential training institutions

Using the extended desk review, discussions with TVET programme personnel, external consultants and based on the sector selection criteria, the study team in guidance with the regional office staff identified and shortlisted several sectors and subsectors as well as the related cities, districts and cluster areas. The team scheduled meetings and field visits with related government entities, chambers, associations, training institutions, companies and individuals for empirical evidence, information and verification.

The sectors and sub-sectors identified in Sindh are in line with government policies, the Programme's documents and the selection criteria developed for the purpose. Pending final decision by the project, the following sectors/sub-sectors is recommended to be included in the next phase of the TSSP:

Geographical Area/ Cluster Location	Sector/Subsector	Employment potentials
Karachi	Textile Sector/Readymade Garments (knitted, woven)	16,000/annum
Karachi	Textile Sector/Home Textiles	20,000/annum
Karachi, Hyderabad	Manufacturing/Car Assembly, Auto Parts	12,500/annum
Karachi	Manufacturing/Printing Industry	8,000/annum
Karachi	Manufacturing/Leather and Leather Goods, Apparel	27,000/annum
Karachi	Services/Logistics, Customer Service	800/annum
Karachi, Hyderabad	Services/Hotel and Hospitality Industry	To be identified
Karachi, Hyderabad	Services/Banking	To be identified

The following business member organisations are related to the above sectors/sub-sectors and are the representative body of a particular business community. However, not all business establishments are members of a specific trade organisation and thus, additional outreach may be necessary. Except for four associations, the team visited the chambers and trade associations and briefly introduced the TSSP. The organisations are very much open for cooperation and are willing to enter into the programme. The contacted organisations generally have a strong membership base and are vibrant and active.

Geographical Area/ Cluster Location	Chamber/Association	Related Training Establishment
Karachi	Pakistan Hosiery Manufacturers & Exporters Association (PHMA), Southern Zone, Karachi Email: secretary.general@phmaonline.com, Web: www.phmaonline.com	Pakistan Knitwear Training Institute (PKTI), Lahore, (PKTI is attached to PHME). STEVTA Institutions
Karachi	Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA); Southern Zone, Karachi Email: info@prgmra.org, Webpage: www.prgmea.org	Pakistan Readymade Garments Technical Training Institute, Karachi (officially linked to PREGMEA)
Karachi	Towel Manufacturers Association (TMA), Karachi Email: tma@towelassociation.com Website: http://www.towelassociation.com	SMA Rizwi Textile Institute, (SMARTI); Karachi; (linked to TMA); Email: query@smarti.edu.pk; Web: www.Smarti.edu.pk
Karachi	Pakistan International Freight Forwarders Association (PIFFA), Karachi Email: piffa@piffapk.com; URL: www.piffapk.com	PIFFA Training Institute, Karachi E-Mail: training-khi@piffapk.com Web: www.piffapk.com
Karachi	Pakistan Association of Automotive Parts and Accessories Manufacturers (PAAPAM); E-Mail: chairman@paapam.com Website: www.paapam.com	Pakistan Skill Development Institute (PSDI) (operated by PAAPAM)
Karachi Hyderabad	Pakistan Automotive Manufacturers Association (PAMA); Karachi; E-Mail: pamaftc@hotmail.com Web: http://www.pama.org.pk/	Pakistan Skill Development Institute (PSDI) operated by PAPAAM.
Karachi	Pakistan Association of Printing and Graphic Arts Industry (PAPGAI); Karachi; E-Mail:	Government College of Technology (Printing);

Geographical Area/ Cluster Location	Chamber/Association	Related Training Establishment
	papgaipk@yahoo.com Web: http://papgai.wixsite.com	AMANTECH CVT training programme.
Karachi	Pakistan Leather Garments Manufacturing & Exporters Association (PLGMEA). Karachi; http://www.plgmea.pk/ Pakistan Tannery Association (PTA), Karachi; http://www.pakistantanners.org/	National Institute of Leather Technology (NILT), Karachi (officially linked to PLGMEA, PTA) http://www.nilt.edu.pk
Karachi	Pakistan Hotel Association (PHA), Karachi E-Mail: info@pha.org.pk Web : http://pha.org.pk/	Pakistan Institute of Tourism and Hotel Management, Karachi; E-Mail: admission@pithm.edu.pk This email address is being protected from spambots. You need JavaScript enabled to view it. Web. http://www.pithm.edu.pk
Karachi Hyderabad	Pakistan Bank' Association (PBA), Karachi; E-Mail: pba@pakistanbanks.org Web: http://www.pakistanbanks.org	The Institute of Bankers Pakistan (IBP), Karachi; E-Mail: bp@ibp.org.pk ; Web: http://www.ibp.org.pk/

Priority recommendations

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

- Manufacturing/Auto Parts, Car Manufacturing
- Manufacturing/Home Textiles, Readymade Garments
- Manufacturing/Leather Garments and Apparel
- Services/Logistics, Customer Service
- Services/Hospitality and Hotel
- Services/Banking and Finance
- Manufacturing/Printing and Packaging

Steps forward

The present sector and sub-sector identification mission focuses on the “meso level” dealing with structures of regional economic segments and associated chambers and associations. It has generically projected the requirements of a specific industry in terms of job opportunities, skills gaps and training needs. It will, however, need a “micro level” implementation during the inception phase of the TSSP by involving companies and training institutions to identify concrete requirements, to assess the support needed and to accordingly prepare the action plans.

The chambers of Karachi, Hyderabad and the German Pakistan Chamber have shown interest in cooperation with TSSP. The contacts made during the consultative meetings needs to be strengthened and deepened.

Recommendations (Chambers)

- The chambers need more information and awareness of their possible role to interact with and take advantage of the TVET system.
- Follow-up meetings need to be scheduled to further discuss the mode and level of interaction with TSSP.

All trade associations contacted and assessed were open to interact with TSSP and are looking forward to discuss about concrete steps and activities. The need to have a better and more 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 designing and delivering CBTA training courses. In some cases, trainings were well conceptualised and delivered; while others have less experience to operate trainings of NVQF 1-3 as needed by the industry.

Recommendations (Associations)

- Internal discussion and decision at Programme level needed to finalise the short-listed association and trades which shall be included into the next phase of TSSP.
- Follow-up meetings with the selected associations need to be scheduled to further discuss the mode and level of interaction with TSSP as well as to establish kind and format of interventions at the micro level.

Introduction

Scope of the assignment

The assignment aims to support the TSSP in defining economic sectors for future interventions and thus facilitates effective TVET planning and delivery in the province of Sindh. Economic sectors and trades showing high employment potentials were to be identified which could be addressed through TVET provisions. In order to link TVET closer to the labour market, the task included the identification of relevant business membership organisations (e.g. chambers, associations) and appropriate training institutions having the will and capacity to develop and deliver qualification TVET measures in the next phase.

Assignment Objectives

- Identification of sectors having high and well paid employment potential which may include overseas employment
- Identification of the required trades, professions
- Identification of possible skill gaps
- Identification and rating of the relevant training institutions
- Identification and rating of the relevant chambers/associations
- Formulation of recommendations/preparation of future road maps.

The following deliverables were agreed upon:

- Identification of at least four (4) economic sectors/subsectors with high employment potentials and identifying suitable business membership organisations and training establishments in the identified economic sectors.
- Preparing a final report recommending and assessing 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 31.10. – 26.11. 2016 and included field visits in Sindh by the consultants.

The team Sindh consisted of two external consultants:

- Mr. Ahmar Iqbal, National Short Term Consultant
- Mr. Wilhelm F. Weidman, International Short Term Consultant

Methodology

General approach

To support Programme achieve its objectives and sustainability, the study mainly looked into 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
- 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 from involved line ministries.
- Papers and documents available from World Bank¹, ADB, ILO, UNDP, PSDF, etc.
- Labour Market Intelligence Survey (Textile), NSIS Cell, NAVTTC.
- Report on Gap Analysis, Pakistan, NSIS Cell, NAVTTC.
- Skills Needs Assessment for the Construction Industry, PSDF.
- Studies, projections, trends and targets available from Chambers of Commerce and Industries, sectoral associations and research organisations.

Pre-Study

A pre-study², conducted between Sept-Nov 2016, has served as the main component of this summary report. Following steps were used in the process of conducting the study:

- Studying the current economic outlook of the country and identify the sectors indicating growth potential for the future.
- Identifying and classifying those chambers and trade associations operating in Karachi, Hub and Hyderabad having linkages with the potential growth sectors.
- Visiting these private sector organisations to understand their current processes of HR development, to introduce the concept of cooperative vocational training (CVT) and to assess their willingness and potential to interact with the TSSP.

Follow-up activities

Follow-up activities were carried out during last week of November in close cooperation with and support by the GIZ Regional Component Office.

Work pattern

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

- Comprehensive internet search; collection, desk review and assessment of relevant materials
- Field visits in Karachi, Hub and Hyderabad

¹ E.g.: World Bank. 2013. *Pakistan - Finding the path to job-enhancing growth: a country economic memorandum*. Washington DC: World Bank.

² Ahmar J. Iqbal, Identification of Sectors and Chambers / Trade Associations for potential partnership in TVET III, Nov. 2016

- Interviews, focus group discussions and one-on-one dialogues with chambers, association, STEVTA and company representatives as well as Programme personnel and other national and international consultant commissioned by GIZ
- Viewing, observing and assessing processes and formats of training establishments
- Citation of used resource materials is kept at a low level to facilitate easier reading

2-step geographical outreach

Initial phase

The Sindh regional cluster mapping, during the programme inception phase, will be limited to easily accessible areas for effective completion of assignment while ensuring smooth implementation and monitoring. Cities and districts earmarked included: Karachi and Hyderabad.

Ongoing programme implementation

After gaining experience from the pilot projects of the inception phase and with the availability of additional sector information, further areas and business clusters shall be included and attended to, e.g. Mirpur, Khas, Larkana, Sukkur, Banbone, Shaheedabad, etc.

Overall working schedule

Place/Date	Topic
21. – 26. 11. 2016 Karachi	Briefing, assignment preparation, field visits and meeting scheduling editorial meetings and discussions “Sector Study Sindh”. Consultative meetings w/STEVTA, Karachi Chamber of Commerce and Industry, German Pakistan Chamber of Commerce and Industry; trade associations and companies.
28.11. – 15. 12. 2016 Home Office	Assignment documentation, report writing and follow-up activities.

The detailed Work Schedule Karachi is provided as Annex 01.

Socio-economic Parameter

National Framework

There is an abundant literature available on Pakistan's economic situation, challenges and way forward, e.g. National and provincial Government strategic papers, EU Annual Action Programme 2015 and therefore, shall not be presented here in detail.

The country's overall development thrust is directed to trigger improved economic growth to overcome existing shortcomings and to provide socio-economic development to the citizens. According to Asian Development Outlook (ADO)³ 2016, GDP growth is expected to accelerate modestly in 2016 at 4.5% and 4.8% in 2017, assuming continued macroeconomic stability, expected improvement in energy supply and the planned infrastructure investments tied to China Pakistan Economic Corridor (CPEC) project.

As per the economic outlook of the country, the **agriculture sector** contributes 19.8 % in GDP and it remains the largest employer by absorbing 43.5 % of the country's total labour force. It consists of six sub sectors: important crops (wheat, cotton, rice, sugarcane, maize), other crops, cotton ginning, live stocks, fisheries and forestry.

The **industrial sector** contributes 21.02 % in GDP and employs 22.5 % of labour force. Unlike 0.19 % negative growth of agriculture sector in 2016, the industrial sector recorded a growth of 6.8 % against the target of 6.4 %, indicating the revival of industrial sector due to on-going infrastructure and power projects. The industrial sector has four sub-sectors including: mining & quarrying, manufacturing, electricity generation & distribution; gas distribution and construction. *Manufacturing* contributes to 65% of the industrial sector and employs 14% of the work force.

The GDP share of the **services sector** is 59.16 % with an employment ratio of 34 %. The services sector has witnessed a growth of 5.71 % in last fiscal year and its performance remained broad based with all components contributed positively. The components of services sector includes: Wholesale and retail trade, transport, storage and communication, finance and insurance, housing services, general government services, and other private services. The projected growth in the industrial sector will likewise impact growth of service sector.

Besides the sectoral outlook, the **China–Pakistan Economic Corridor (CPEC)** itself serves an opportunity that will trigger improved economic growth in the country. It is an economic corridor comprising a collection of projects currently under construction at a cost of \$51 billion. CPEC aims to facilitate trade along an overland route that connects Kashgar and Gwadar, through the construction of a network of highways, railways, and pipelines. It is predicted that this project will result in the creation of upwards of 700,000 direct jobs from 2015 to 2030 adding 2.0 to 2.5 %age points to the country's annual economic growth.

³ Asian Development Outlook, Asian Development Bank, 2016

The challenges that hinder growth in Pakistan include weak infrastructure and transport systems, fragile security conditions, power crisis, inadequate workforce skill development, governance, service delivery and access to finance. These challenges hamper the country's ability to effectively compete in global markets and became a hindrance in transition to produce higher value added products.

A positive turn was observed by the Overseas Investors Chamber of Commerce and Industry (OICCI) in its latest business survey stating that improvements in the energy management and law and order situation have led to an upturn in confidence of the business community. The latest Business Confidence Index touched a record level of 36%, showing an improvement of 14% over the previous survey result of November 2015.

Sindh Framework

One major component of the national growth strategy is directed to support and develop the manufacturing sector and export-related industries. Therefore, the main economic growth sectors pre-selected for Sindh, equally relevant to the TSSP are:

Textile industry is the largest manufacturing industry in Pakistan. Pakistan is the 8th largest exporter of textile products and the 4th largest producer of cotton with the third largest spinning capacity in Asia. This sector contributes 8.5% to the GDP and 52% to the overall exports of Pakistan; last year textiles exports were worth USD 10.2 billion. The sector employs about 38% of the manufacturing workers. However, due to robust international competition, the share of Pakistan's textile industry has decreased from 2.2% to 1.7% in the global textile market. In order to overcome the current situation, the industry needs to enhance productivity and improve quality which can only be achieved through investing in better skilled workforce.

Auto manufacturing sector is of prime significance to the national economy and represents 16% of the manufacturing sector. Pakistan's auto sector approximately produces 1.7 million motorcycles, over 150,000 cars, 50,000 auto rickshaws, 46,000 tractors and over 37,000 commercial vehicles annually and directly employs over 200,000 people. Large manufacturing units mainly constitute the sector and major cluster is housed in Karachi. The sector forecasts a growth trend with car production increases to 350,000 cars by 2021⁴, according to the Automotive Development Policy 2016-2021. BMI research also endorses the growth trend in the auto industry; projecting an annual growth of 9.6% from 2016 to 2020. The enabling environment including the availability of human resources pool is encouraging for the new entrants in the sector and Audi and Renault have shown interest to set up assembling plants in Pakistan.

Auto part manufacturers as a downstream industry comprises of approximately 2,000 units, out of which 400-500 are in the organised sector employing about 1.6 million people. The sub sector consists mainly of small and medium size companies and produces a variety of auto parts including interior trims, plastic parts, forgings, casting, machined parts, rubber parts and electrical parts. Main clusters are in Karachi and Hyderabad.

Printing industry in Pakistan has a value of USD 5 billion. Nationwide, there are 15,000 printing units and the sub sector is the second biggest employer in the country after textile.

⁴ Automotive Development Policy 2016-2021, Engineering Development Board, Ministry of Industries and Production, Government of Pakistan, Islamabad, March 2016.

The printing industry is steadily growing and has great potentials to grow many folds. Directly or indirectly, the printing business contributes to every sector of industry, commerce and society.

International freight forwarding industry constitutes the transportation (sea, air, road and rail), storage and communication segments of the services sector. According to the economic survey of Pakistan, these three segments combined had the second biggest share of GDP at 13.7% in 2013. 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 the fourth largest in Asia. Sindh plays a vital role in this industry due to the presence of ports which are managing nation's major cargo influx and out flux through various transportation means.

Hospitality sector in Sindh comprises of a wide array of businesses from transport services to cafés and restaurants that addresses the needs of commerce, travel, leisure and catering services. Hotels, in the hospitality sector, are a main revenue generating segment of the service sector in Pakistan and together with travel and tourism; it has contributed 2.9% in the GDP in 2014. The industry has experienced a significant business improvement since the average occupancy rate has surged to 80% by August 2016. This increase can be attributed to improved law and order situation and enhanced business enabling environment particularly due to the China Pakistan Economic Corridor.

TVET framework

The national and provincial TVET framework shall enable conducive conditions to increase the efficiency of local industry and to create viable environment for new entrants for improved economic growth. Resultantly, the economic growth trends require appropriately trained human resources to meet the demands of new employment opportunities. National Skills Strategy (NSS) of 2009, as an overarching policy directive, proposes a paradigm shift in TVET system by providing relevant skills for industrial & economic development, by improving access, equity & employability; and by assuring quality. Based on the NSS and the Pakistan Strategy Vision 2025, the Ministry of Federal Education and Professional Training developed a broader National TVET Policy with participation of various stakeholders from public and private sector. This initiative places emphasis on increasing training opportunities for young people as well as on re-skilling existing workers; implementing the National Vocational Qualification Framework (NVQF) and the Competency-based Training and Assessment approach (CBT&A) and the initiative is among the reform measures of the TVET Sector Support Programme.

The reform measures of TSSP in the province of Sindh aims at further contributing towards the socio-economic growth through developing skilled human resources, enabling people to engage in productive employment and promoting equitable access to a market-led TVET system while enhancing employability of graduates. This will be accomplished through increased collaboration and involvement of private sector in TVET designing and delivery.

Identification of sectors and sub-sectors

The sectors having potential for future growth and employment are identified through analysing the economic outlook of the country presented in various policy and research papers, economic surveys, statistical data and the progress envisioned under the CPEC project. The private sector organisations operating in Karachi and Hyderabad were reviewed and assessed for their linkages and prospective role in the identified growth sectors.

1. The recently published “Business Monitor International” Research 2016 has included Pakistan in its list of "10 emerging markets of the future" that are set to become new drivers of economic growth over the next 10 years. It is further expected that the raising wage bills in China may result in shifting of labour intensive manufacturing to Pakistan, Bangladesh and Myanmar. In the purview of changing dynamics in the national and international economic outlook, it is expected that manufacturing and service sector will experience major growth trends in the coming years in Pakistan and major emphasis will be on the following sectors/sub-sectors: Textile sector, being the biggest sector in manufacturing, having 52% share of Pakistan’s export, employs about 38% of the manufacturing workers (15 million people) and adds almost 9% of national GDP.
2. Automobile sector having highest growth of 23.4% in the last year and with a projection of 9.6% growth per annum till 2020.
3. Printing, being the second largest sector in manufacturing, with a current turnover of USD 5 billion and having projection to grow 8% per annum in next three years.
4. Supply chain with growth in manufacturing, warehousing and transportation because of CPEC and the operations at Gwadar port.

These sectors/sub-sectors are recommended to TSSP after being assessed for compliance against the selection criteria which included:

- Priority in the governments’ socio-economic development plans (federal/provincial)
- High employability potentials(preferable local demand; overseas employment may be included in case of concrete demands)
- Balance of industrial and artisan trades
- Availability of information and materials to identify possible skills gaps
- Trades and professions covered by accessible CBT&A curricula and packages
- Possibility to identify capable business organisations (chambers, associations, etc.)
- Possibility to identify relevant and potential training institutions

Manufacturing / Home Textiles; Towel Manufacturing

Manufacturing / Ready-made Garments

Sector Overview

Textile manufacturing is one of the important sectors of Pakistan and has the longest production chain, with inherent potential for value addition at each stage of processing, from cotton to ginning, spinning, fabric, dyeing and finishing, made-ups and garments. Garments manufacturing is highly labour intensive, hence having great potential for employment generation.

Sindh has 54% of country's textile units which includes spinning, weaving, knitting, ready-made garments, towels and canvas. Karachi is a major textile hub with garment manufacturing cluster and towels, canvas, home textiles, hospital linen, etc. manufacturers. The garment sector is dominated by small and medium companies (SMEs) and larger units exist especially in the weaving, towel and linen manufacturing category.

There are about 10,000 towel looms, collectively in the organized and unorganized sector and the current manufacturing capacity have been upgraded for improved production, quality and value addition. This has resulted in 3.13 % increase in the quantity during 2016.

The government plans to support and develop the industry and launched the Textile Policy 2014-19 for providing concerted efforts for the development of textile sector. Special training programmes are planned to train sufficient men and women over a five years period for skills required in the value-added sector such as garments and made ups. The training will be imparted in training centres and by utilizing factory spaces for training purposes.⁵

The garments, towel and home textile sub-sector is among the potential sectors for TSSP due to huge workforce requirement at different levels, availability of training institutes (public as well as private sector governed) and the presence of vibrant private sector representation organisations including PRGMEA, TMA and PHMA. These organisations operate affiliated training centres and thus, have the potential to ensure sustainability of TSSP interventions. The programme may probe the training and employment requirements of further sub sectors of the textile sector.

More details are provided in Sector Chart 3.1. and Sector Chart 3.2.

Manufacturing/Automotive Industry; Auto Parts Manufacturing

Sector Overview

The automobile sector is a large industrial sector of Pakistan producing all types of vehicles including passenger cars, vans, jeeps, light commercial vehicles (LCV), buses, trucks, tractors, motorcycles and three wheelers. The automobile industry consists of three active car manufacturers (Suzuki, Toyota, and Honda), 68 manufacturers of motorcycles and six

⁵ Textiles Policy 2014-19, Ministry of Textile Industry, Government of Pakistan, February 2015

units producing trucks/buses. Audi and Renault are also planning to setup their own plants in Pakistan. The automobile divisions such as trucks, tractors, cars, jeeps and LCVs have a registered growth of 53.9%, 44.6%, 23.1 % and 31.2%, 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 1980, the sector experienced a high growth rate with the entry of Japanese manufacturers into the Pakistani market. 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 as many as 2,200 auto-parts manufacturers in Pakistan with the largest concentration of auto-parts manufacturing units in Karachi and the second one 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% 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. The total employment in this sector is about 210,000 of which 187,000 persons work in the auto parts sector.

The growth in the economy during the last few years has stimulated the manufacturing sector's growth likewise. Particularly the auto industry profited by this development and outperformed other sectors in production and sales. Increasing disposable income, availability of financial options besides the government's economic reform policy and the professional approach of the assemblers and vendors has helped the industry reaching a highly satisfying stage during the last 6-7 years.

The Automotive Development Policy (ADP), 2016–2021, Engineering Development Board, Ministry of Industries and Production, provides a focused approach to further develop the industry. It includes tax incentives to new entrants to help them establish manufacturing units. In response, Renault-Nissan, Kia Motors and Audi have expressed interest in entering the Pakistani automobile industry.

More details are provided in Sector Chart 3.3.

Manufacturing/Printing Industry

Over the years, the industry has attained high reputation in service delivery by adequately meeting the paper and printing needs of the local industry including multinational and export-oriented companies. It has also proved its worth internationally by supplying quality printed products to Far Eastern Countries, Middle East, Europe as well as the United States. It is not only reliable for providing high quality labels and packaging to the local export-oriented industry but also to their international clients. Pakistan printing industry is highly reputable in HD aluminium printing due to the commissioning of sophisticated

technology by a large number of companies in the country. The industry is employment intensive and provides jobs to millions of people.

The human resource requirement of the industry, however, is specialized and needs highly trained people due to the high standard and modern printing infrastructure. In order to address the demand for skilled workforce, Pakistan Association of Printing and Graphic Art Industry (PAPGAI) initiated the establishment of a Polytechnic Institute of Printing and Graphic Arts. Recently, the association has started a training program with AmanTech for printing machine operators. The training is based on the CVT approach with guaranteed employment for the successful candidates. The sector is recommended to TSSP for consideration due to high prospects in training and development and employment.

More details are provided in Sector Chart 3.4.

Manufacturing/Leather & Leather Goods

The second largest export industry in Pakistan is Leather. It is one of the most productive contributors to the country's GDP and foreign exchange earnings. There are as much as 800 tanneries in the country engaged in producing best quality finished leather of cow, buffalo, sheep and goat skins. The core products of the industry are tanned leather, leather garments, gloves and footwear.

In 50s and 60s, most of the tanned leather was exported in raw form. But with the advent of semi-finished leather production by the local tanning industry, finished products grew rapidly due to availability of raw material, labour and growing demand in foreign markets. The industry is contributing more than USD 800 million to the foreign exchange in Pakistan and has a significant growth and employment potential by product diversification and improved quality.

The growth rate of leather products amounts to 9.62% in 2014–2015. The production capacity of around 450 leather garment manufacturers in Pakistan is more than 7.5 million pieces; however, they are producing 5 million pieces. Similarly, footwear industry, a key sub-sector of leather industry, is producing 100 million pairs annually as oppose to the annual production capacity of 200 million pairs. In terms of employment potential, the industry directly or indirectly employs more than 500,000 people It is a work-force intensive industry and facing grave issues with regards to HR: Shortage of shop floor workers (footwear, gloves), low productivity levels of shop floor workers and middle management level, lack of awareness of entrepreneurs regarding professional management techniques, compliance, marketing, etc., thus affecting the overall productivity and quality of the sector.

More details are provided in Sector Chart 3.5

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

Sector overview

The services sector 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% of GDP FY 2009 to 59.16% in FY 2016. Compared to 4.31 % last year, the services sector has witnessed a growth of 5.71% in this fiscal year. Services sector performance remained broad based, as all components of services contributed positively; Wholesale and Retail Trade grew by 4.57%, Transport, Storage and Communication by 4.06%, Finance and Insurance by 7.84%, Housing Services by 3.99%, General Government Services by 11.13% and Other Private Services by 6.64%.

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

About 95% of the total freight cargo is moved by road, 3% 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 are 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.

Besides the ongoing growth, the sector expects a steep increase in business opportunities through the CPEC programme especially the development of the Gwadar port facilities, warehousing, forwarding, customs clearance and brokerage. The sector will create a great number of additional job openings and in order to meet this additional manpower requirement, the sector's association PIFFA has started their own training facilities in Karachi and Lahore. Cognizant of the growing manpower requirement of the sector, it has been proposed to TSSP as a viable sector for consideration.

More details are provided in Sector Chart 3.6

Services Sector/Hospitality and Hotel

Sector overview

The hospitality sector in Pakistan comprises of a wide array of businesses from transport services to cafés and restaurants that cater to needs of commerce, travellers, leisure and catering services. Pakistan has recently emerged as an important investment destination for new hotel developments. After a gap of almost five years, hotels in Pakistan are witnessing substantial increase in growth, both in terms of occupancy and average rate and this trend is expected to continue. Hotels are a major revenue generating segment of the services sector in Pakistan. Direct contribution of the travel and tourism sector (including hotels) represented 2.9% (amounting to PKR. 726.8b) of Pakistan's total GDP in 2014.

Demand for hotels in Pakistan is primarily generated by business-related and leisure-bound customers. Domestic visitors account for the majority of business whereas foreign spending represented only 8.1% (amounting to PKR. 1.7 billion) of the total travel and tourism's contribution (direct, indirect and induced) to GDP, at end of 2014.

During 2015, average occupancy rate across the industry was low at around 35% mainly because of the overall situation in the country. However, with significant improvement experienced during the ongoing period, the average occupancy rate has surged to 80% by August 2016. This increase can be attributed to improved law and order situation in the country and enhancement in business-related travel, especially since initiation of CPEC. According to industry sources, the ratio of foreign to local visitors has also improved from 30-70 in 2015 to 50-50% in 2016.

More details are provided in Sector Chart 3.7

Services Sector/Banking

Sector overview

The financial sector of Pakistan has witnessed positive and increasing trend since fiscal year 2011 due to several regulatory reforms and policy initiatives adopted by the State Bank of Pakistan to ensure a sound and robust financial sector. The improved financial system had a positive and significant impact on the economic development and ensured efficient utilization of financial resources, accelerated saving and investment rate and helped in poverty and inequality reduction by increasing the ability of individuals to access basic services, like health and education.

According to the Economic Survey of Pakistan for fiscal year 2015-16, overall performance of the banking sector during the last two years remained quite impressive. Several positive developments, such as better energy supply and rise in manufacturing activity, improved security conditions, macroeconomic stability, rise in investor confidence, low inflation and commodity prices, particularly, oil prices, besides enabling regulatory environment, have been instrumental in making the banking sector grow steadily.

The momentum continued in the fiscal year 2016 with asset base, which registered a growth of 18.2% and reached PKR 14.3 trillion by the end of March 2016 as compared to PKR 12.1trillion at the end of March 2015. Besides investments, credit to the private sector has also started to accelerate. Advances grew with a significant rate of 8.3% in 2015. Growth in advances is concentrated to private sector credits which show a decent growth of 7.9% during 2015 in comparison to last year. The growth trend in the financial sector stipulates the demand for skilled human resources that are competent to promulgate the positive trends to customers and built their confidence and trust to fuel further growth in the sector.

More details are provided in Sector Chart 3.8

Recommended sectors for further consideration

The present sector study limited its focus on the sectors, sub-sectors and the regional outreach. However, during the study period, the following sectors and sub-sectors

appeared to have robust growth rates providing additional employment possibility which include opportunities to female employees. It is therefore, recommended to further investigate the potential of these sectors for TSSP.

Sector/Sub-sector	Business Association
Information and Communication Technology (ICT)	Pakistan Computer Association (PCA) 201 Landmark Plaza, I.I. Chundrigar Road Karachi UAN: 111-435-435; Phone: 021-32627931; 021-32628019 Fax: 021-32215526; http://pcapk.org/
Whole Sale / Retail Trading	Karachi Wholesale Grocers Association 2nd Floor Quetta Wala Building, Ibrahimjee Street, Dandia Bazar, Opp. City Court, Karachi. Phone : 021-32774537; Fax: 021-32752693 E-mail: kwga@cyber.net.pk/ ; http://kwgapakistan.org/
Construction Industry	Karachi Constructors Association (KCA) Suite No. 621, 6th Floor, Mashriq Center, Block 14 Gulshan-e-Iqbal, Sir Shah Sulaman Road, Karachi. Phone: 021-34853476; 34990108 E-mail: info@kca.org.pk ; http://www.kca.org.pk/
Insurance Industry	The Insurance Association of Pakistan (IAP) Head Office; 1713-1715, 17th Floor, Saima Trade Tower-A, I.I. Chundrigar Road, Karachi-74000. Phone: 021-32277165 – 68 Fax: 021-3227 7170 E-mail: info@iap.net.pk ; www.iop.net.pk

List of sector charts 3.1 – 3.8⁶

Chart 3.1 Textile/Readymade garments (woven, knitted)

Geographical Area Cluster Location	Sector/Subsector	Rational	Trades/Profession	Employment potentials	Business Membership Organisation	Training Establishment
Karachi	Manufacturing: Textile: Readymade garments (woven)	Largest subsector of textile industry; 38% of total workforce; 60% share in export; Labour intensive production; Constant workforce requirements at NVQF 1, 2, 3;	Industrial stitching Machine operator Stitching machine mechanic Apparel supervisor Pattern drafting & cutting CAD/CAM pattern design Quality control & QA Planning & production control	Estimates: Approx. 80,000 – 100,000 persons for 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 Manufacturers & Exporters Association (PRGMEA), Karachi	Pakistan Readymade Garments Technical Training Institute, (PRGTTI), Karachi (officially linked to PRGMEA) STEVTA iACT AMANTECH Hunar Foundation Memon Industrial and Technical Institute
	Textile: Readymade garments (knitted)	Garments sector has comparatively stable exports as compared to the other exports sectors.	Knitting machine operator Machine/ hand embroidery Computerised industrial embroidery Professional garment washing		Pakistan Hosiery Manufactures & Exporters Association (PHMA), Karachi	
Key potentials/strength:	<p>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</p> <p>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.</p> <p>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</p>					
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.					

⁶ Please Note: The Trades / Profession listed are reported needs by the industries and include functions as well as jobs to be performed and are not necessary established trades or professions.

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; NVQF 3: Textile/Fashion Designing; Maintenance Technology: NVQF 2: Heat, Ventilation & Air-conditioning (HVAC); Industrial Electricity; Home Appliance Technician; NVQF 3: Mechatronics Technician; NVQF 1-3; Building Electricity; NVQF 5: Energy Efficiency Advisor

Chart 3.2 Textile/Towels, Linen, Home Textiles

Geographical Area Cluster Location	Sector/Subsector	Rational	Trades/Profession	Employment potentials	Business Membership Organisation	Training Establishment
Karachi	Manufacturing: Textile; Terry towels, Linen, Home textiles The industry produces all kinds of home textiles like terra towels, bathrobes, towels, bedlinen, sower wraps, curtains, made-ups, etc.	Large subsector of textile industry; High level products and quality consciousness; Industrialised production methods include labour intensive sections; Increasing requirements of NVQF 2-5 level workforce; Lack of electrical and mechanical maintenance personnel, PLC/CNC technicians.	Weaving operator Stitching machine operator Quality checkers Pattern making & cutting Packaging Machine embroidery Pre-treatment Dyeing & printing Yarn dyeing Post-treatment Textile machinery technicians General maintenance – mechanical and electrical Plant maintenance (power, water treatment, boiler operation, conveyor systems, etc.)	Estimates: Weaving 4,000/annum Processing 5,000/annum Stitching 10,000/annum Quality 1,000/annum High demand: Industrial stitching machine operator; Stitching machine mechanic Hand and machine embroiderers Maintenance personnel	Towel Manufacturers' Association (TMA) Karachi	SMA Rizwi Textile Institute (SMART), Karachi. STEVTA Memon Industrial and Technical Institute AMANTECH Hunar Foundation Karigar Institute
Key potentials/strength:	Textile industry is the backbone of Pakistan's economy and exports. Three garment cities were setup in Karachi, Lahore and Faisalabad. These projects have been incorporated as public-private- partnership (PPP) companies. There will be an additional demand of workforce at all levels due to new companies in the textile cities and the expansion of existing firms.					
Key weaknesses/risks	Possible awareness needed among trainees and employers for structured and longer training phases. Workplace-based learning programmes need to be well planned in industrial manufacturing settings.					

Other remarks:	Focus group discussions need to be carried out with the sector association and companies 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 packages available	Textile Trades: NVQF 2: 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; NVQF 3: Mechatronics Technician; NVQF 1-3; Building Electricity NVQF 5: Energy Efficiency Advisor

Chart 3.3 Manufacturing, Light Engineering / Auto Assembly, Auto Parts Supply

Geographical Area Cluster Location	Sector/Subsector	Rational	Trades/Profession	Employment potentials	Business Membership Organisation	Training Establishment
Karachi Hyderabad	Light engineering: (Automotive) Auto parts Cars and Light Commercial Vehicles (LCVs) Parts for two wheelers three wheelers Tractor parts Parts for trucks and buses Parts for after sales market	Market size has increased tremendously requiring increase production volume; Rapid change in technology requires better qualified workforce; Conventional systems are changing to computer aided systems; Traditional on-the-job training is insufficient; Technology up-gradation requires adequate employees of NVQF Level 1 – 6.	Whole range of metal working and electrical trade, which includes: 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% Present CVT courses can continue as well.	Sector-wide employment < 200,000 employees; Estimates: 15,000 persons / annum.	Pakistan Association of Automotive Parts & Accessories Manufacturers (PAAPAM), Karachi	Pakistan Skill Development Institute is run by PAPAAM and offers skill enhancement trainings. AMANTECH Hunar Foundation Saint Patrick's Karigar Training Institute STEVTA Memon Industrial and Technical Institute
Key potentials/strengths:	Important light engineering supply to the domestic market. Raising demand on machinery, machinery parts and of electrical home appliances Good support of institutional infrastructure 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:	Potential sector due to high demand for skilled workforce as well as rapid technological advancements 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; NVQF 3: Auto CAD; Automotive Technician; Mechanical Manufacturing; Mechatronic Technician, Electronics Technician; CAD/CAM Operator NVQF 5: Energy Efficiency Advisor

Chart 3.4 Manufacturing/Printing

Geographical Area Cluster Location	Sector/Subsector	Rational	Trade(s)/Profession(s)	Employment Potentials	Business Membership Organisation(s)	Training Establishment
Karachi Hyderabad	Manufacturing: Printing & Graphic Arts. These include conventional offset, flexible printing (gravure and flex), label printing, screen printing, binding houses and carton making units.	Second largest sub sector with current market worth of USD 5 billion. Economic growth require additional workforce of NVQF level 2 – 5. Modern printing technology calls for Higher qualification.	Printing press operators Electronics technicians PLC technicians Mechanical and electrical machine and plant maintenance technicians Graphic designers Materials handling	The total industry upstream and downstream employees' 1 million people. Estimates: 8000-10000 people/annum	Pakistan Association of Printing and Graphic Art Industry (PAPGAI)	PAPGAI on their own initiative have started a 6-months machine operator training based on CVT model with AMANTECH STEVTA Government College of Technology (Printing); Diploma of Associate Engineer in (Printing & Graphic Arts);
Key potentials/strength:	Huge potential for export and is associated with every industry. Modern equipment is installed in the country.					
Key weaknesses / risks:	Raw material has import duty but finished books and printed material is duty free.					

CBT&A Packages available	Printing Trade: NVQF 2: Computer Operator; NVQF 3: Computer Graphics-Motion; Computer Graphics-Print; Web Design & Development; Production and 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; Electronics Technician NVQF 5: Energy Efficiency Advisor
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Chart 3.5 Manufacturing/Leather and Leather Goods

Geographical Area Cluster Location	Sector/Subsector	Rational	Trade(s)/Profession(s)	Employment Potentials	Business Membership Organisation(s)	Training Establishment
Karachi	Manufacturing: Leather & Leather Goods	<p>The leather industry exports contribute USD 1.3 billion in the GDP and plans to increase to USD 3.7 billion through 3300 SMEs in the next five years. . .</p> <p>The leather garment manufacturers aim to augment production to its full capacity of exceeding 7.5 million pieces annually.</p> <p>Likewise, the footwear industry to 200 million pairs annually against its current annual production of just 100 million pairs.</p>	Leather processing Cutting techniques Pattern making techniques Grading Product design & development Lining & interlining Stitching Machine operation Machine maintenance Finishing	Employed 0.20 million workers Estimates: 0.4 million in next five years	Pakistan Leather Garments Manufacturers & Exporter Association (PLGMEA) Karachi Pakistan Tanners Association (PTA), < 200 members Karachi	National Institute of Leather Technology (NILT), Karachi (officially linked to PTA / PLEGMEA) STEVTA HUNAR Foundation AMANTECH Memon Institute
Key potentials/strength:	Industry with high value chain, labour intensive production, fashion oriented challenges.					
Key weaknesses/risks:	Export reliance, international competition; reluctance to address adequate workforce requirements.					
Other remarks:	<ul style="list-style-type: none"> Established a requirement for workforce of NVQF level 1- 3; already trained 10,400 workers in; cutting, shoe upper stitching and shoe assembling. A more focused TNA need to be carried out with the sector associations for development of concrete and tangible project proposals 					

CBTA Packages available	<p>Leather trades: NVQF 2: Shoe Laster;</p> <p>Maintenance Technology: NVQF 2: Heat, Ventilation & Air-conditioning (HVAC); Industrial Electricity; Electrical Equipment Installation & Repair; Electro Mechanical Technology.</p> <p>NVQF 3: Mechatronics Technician; NVQF 1-3; Building Electricity, NVQF 5: Energy Efficiency Advisor</p>
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Chart 3.6 Services / Logistics, Customer Services

Geographical Area Cluster Location	Sector/Subsector	Rational	Trades/Professions	Employment potentials	Business Membership Organisation(s)	Training establishments
Karachi	<p>Services:</p> <p>Customer Service</p> <p>Logistics (Transportation, Communication and Storage)</p>	<p>The three sub-sectors (jointly referred as logistics) contributed 13.7% in the GDP of Pakistan.</p> <p>Provides a large number of direct and indirect employments.</p> <p>Sectors require a relatively higher educated workforce (NVQF level 4 -5) at professional and middle management position.</p>	<p>Trades/skills required by the sector include:</p> <p>Loaders</p> <p>Drivers</p> <p>Green logistics management</p> <p>Custom house brokerage</p> <p>Dangerous goods packing and handling</p> <p>Safety and security management</p> <p>Sales agents</p> <p>Warranty handling & management (repair/replacement shipment handling)</p> <p>Freight forwarding</p>	<p>Estimates: Approx. 1,500 - 2,000 persons at the professional and middle management level over the next 2-4 years (mostly diploma holders).</p>	<p>Pakistan International Freight Forwarders Association (PIFFA), Karachi</p>	<p>PIFFA Training Institute Karachi and Lahore (Institutes being managed by the association itself. Providing diploma level training in logistics and supply chain management)</p> <p>iACT</p> <p>STEVTA.</p>
Key potentials/strengths:	<p>Association (PIFFA) has its own training institute that is catering to the HR requirements of the sector</p> <p>Association has made it mandatory for the organisations to either train two existing members or employ diploma holders of the institute to obtain membership</p> <p>New freight forwarding/supply chain companies/ware-houses will emerge and more jobs will be created with China Pakistan Economic Corridor</p> <p>Diploma programme offered by the association is on modular basis</p>					

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:	Potential sector due to high demand for the workforce at the middle management levels PIFFA is willing to participate with the project and a more focused TNA need to carry out for the way forward
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

3.7 Services/Hospitality Industry; Tourism

Geographical Area Cluster Location	Sector/Subsector	Rational	Trade(s)/Profession(s)	Employment Potentials	Business Membership Organisation (s)	Training Establishment
Karachi	Services: Hotel Industry	Pakistan's hospitality industry is booming due to growing economic activities particularly the CPEC project. The rate of hotel occupancy has surged to 80% across the country compared to 35% in previous years. The sector has greater possibilities of female employment.	Hotel operations Hospitality and tourism management Professional cookery Food & beverage production and service Front office / guest services Customer services Sales Housekeeping	Estimates: To be disclosed on further discussions with PHA	Pakistan Hotel Association (PHA), Karachi Pakistan Tourism Development Corporation	Pakistan Institute of Tourism and Hotel Management, Karachi TAF Foundation, Karachi College of Tourism & Hotel Management (COTHM) Karachi iACT STEVTA Memon Industrial and Technical Institute
Key potentials/strength:	Since the growth in hotel industry is closely linked to growth in GDP and business related activity, any adverse movement in the same could hurt industry profitability and revenue indicators significantly. Demand for hotels is directly proportional to growth in tourism. Increase in overall business activity also attracts travellers/ businessmen for extended periods of stay.					
Key weaknesses/risks:	Business travel and tourism plays a key growth driver for the hotel industry which in turn is driven by the law and order situation as well as number of accessible tourist attractions.					
Other remarks:	A more focused assessment need to be carried out with the sector association and business community to establish dependable NVQF levels and					

	employment numbers. Establish liaison with large and established hotels for training delivery at their premises.
CBTA Packages available	<p>Hotel Industry: NVQF 2: Cook; Waiter; Office Assistant; NVQF 3: Chef de Partie; Food & Beverage Captain; Call Centre Agent ; Web Design & Development ; NVQF 4: Sous Chef; E-Commerce</p> <p>Maintenance Technology: NVQF 2: Heat, Ventilation & Air-conditioning (HVAC); Industrial Electricity; Electrical Equipment Installation & Repair; Electro Mechanical Technology; Electronic Home Appliance Technician. NVQF 3: Mechatronics Technician; NVQF 1-3; Building Electricity, 1-3 Plumbing-cum-Solar Water Heating Technology NVQF 5: Energy Efficiency Advisor</p>

3.8 Services/Banking and Financial Institutions

Geographical Area Cluster Location	Sector/Subsector	Rational	Trade(s)/Profession(s)	Employment Potentials	Business Membership Organisation (s)	Training Establishment
Karachi Hyderabad	Services: Banking and Financial institutions including asset management and insurance companies).	With 65 banks, 55 asset management companies and 25 insurance corporations, the financial sector is a largest services sector in Pakistan with overall 3.5% growth rate. Requires skilled human resources on a regular basis due to vast branch network of banks and other financial institutions. The sector has greater possibilities of female employment.	Customer services Branch banking operations Marketing Sales and after sales services Office management, IT and administration Secretarial skills Branch fraud risk management Account opening specialist KYC/AML specialist Credit risk analysis Trade processing specialist – Export & import	Estimates: To be added	Pakistan Banks' Association (PBA) Mutual Funds Association of Pakistan Insurance Association of Pakistan	Institute of Bankers Pakistan (IBP), Karachi (only recognized Institute dedicated to providing technical training services for the banking industry in the country.) iACT STEVTA Pakistan Institute of Management Skill Development Council Memon Industrial and Technical Institute
Key potentials/strength:	Robust growth sector with increased employment possibilities for female management and staff.					

Key weaknesses/risks:	Banking sector in Pakistan has been witnessing enormous changes due to globalisation, liberalisation and other international events and has gone through multiple reforms since nationalisation in 1974 and privatisation of banks in 1991.
CBTA Qualifications Available	<p>Banking: NVQF 2: Computer Operator; Office Assistant, Customer Service & Sales Assistant; NVQF 3: Call Centre Agent; Web Designing & Development; Logistics & Supply Chain Assistant; NVQF 4: E-commerce</p> <p>Maintenance Technology: NVQF 2: Heat, Ventilation & Air-conditioning (HVAC); Industrial Electricity; Electrical Equipment Installation & Repair; Electro Mechanical Technology; Electronic Home Appliance Technician. NVQF 3: Mechatronics Technician; NVQF 1-3; Building Electricity, 1-3 Plumbing-cum-Solar Water Heating Technology NVQF 5: Energy Efficiency Advisor</p>

Profiles of identified Business Membership Organisations

The private sector organisations visited for the purpose of study have been motivated to support TVET planning and implementation. They were keen to participate in TVET and requested for clarity on their role in TVET and the requisite structural changes within the organisation to effectively contribute in TVET delivery. In general, the organisations have limited background and knowledge on formal TVET interaction especially the prospective learning pathways and CVT approach. They require more information and awareness on TVET reforming in Pakistan.

Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA)

Organisational Profile

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	
Affiliation	PRGMEA is affiliated with: Federation of Chambers of Commerce & Industry; Employers' Federation of Pakistan; AAFA (American Apparel & Footwear Association), MOU with French Garment Association	
PRGMEA Zonal/ Sub Offices	Central Office (Karachi) South Zone (Karachi)	North Zone (Lahore) Sub-office (Sialkot)
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. It has more than 1000 members across the country and the trade employs directly 650,000 workers.	
Purpose	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	Membership Fee, donations from industries	
Technical Support Cell (TSC)	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 (PRTTI)	<p>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. Karachi Campus; 18-G, Block-6, P.E.C.H.S., Shahr-e-Faisal, Karachi.</p> <p>Tel: (+92)-(021)-4546446-47-48, 4526918; Fax: (+92)-(021)-4536686, 4539669; Email: prgtti@cyber.net.pk</p> <p>Lahore Campus; 71-L, Gulberg-III, Lahore-Pakistan</p> <p>Tel: (+92)-(042)-9230756, 9230757; Fax: (+92)-(042)-9230758; Email: prgtti@sol.net.pk</p>	

Findings

PRGMEA is the premier trade organisation representing the Readymade Garment Industry in Pakistan. The organisation maintains a Central Office and Zonal Offices (South) in Karachi, a Zonal Office (North) in Lahore and a Sub-Office in Sialkot. The association has a large and strong membership base and is very active. Its management and office bearers are aware of the changing skills requirements for improving productivity, quality and adapting new technologies and materials.

In order to address the demand of skilled workforce, the association in affiance with the Ministry of Textile Industry, established the first Pakistan Readymade Garments Technical Training Institutes (PRGTTI) in 1997. Since its inception, the institute has built rapport in the industry for its quality training programmes.

The training programmes at PRGTTI are a pragmatic blend of practical and theoretical knowledge. The short courses of PRGTTI are demand driven and catering to all facets of the garment industry. They are specifically designed to meet industry's immediate training needs and to upgrade the skill profile of the workforce. All short courses are designed for:

- Cost effectiveness
- Practical skill
- Focused trainings
- Training of staff at all levels

The association works in close alliance with all its training institutions (Karachi and Lahore) and has planned a training centre in Sialkot to address the demands of Sialkot cluster.

Conclusions, Recommendations, Road Map

PRGMEA has shown great interest in TVET reforming and are willing to be a partner organisation to support the ready-made garment sector in Karachi, Lahore and Sialkot. A synergistic effect is possible as the proposition of cooperation with TSSP was very much appreciated by the association and its allied training centres and is therefore, highly recommended.

Next steps:

- Initial meetings (internal/external) are necessary in order to identify the working mechanisms related to the Central Office, Karachi and the Zonal Offices at Karachi and Lahore and the Sub-Office in Sialkot.
- The skills gap and training needs identified are at general industry level and need to be specified and ranked at shop-floor level depending on the region, product specification and size of the industry.
- To avoid duplication of and/or conflicting communication and implementation structures with PRGMEA chapters, an organised plan of action and project management system for Punjab and Sindh needs to be decided and jotted down.

Pakistan Hosiery Manufacturers & Exporters Association (PHMA)

Organisational Profile

Item	Details
Name	Pakistan Hosiery Manufacturers & Exporters Association (PHMA)
Address/Headquarter	PHMA House, 37-H, Block-6, P.E.C.H.S., Karachi Tel: (+92)-(021)-34544789, 34522685, 34522769 Secretary General (+92)-(021)-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/Regional 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 7 July 1960 and incorporated under the Companies Act 1913 on the 31 August 1960. The hosiery sector comprises of 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 direct 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, providing 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 fibres and to raise the standard of their production and enhance exports.
Financing	Membership Fee, donations from industries
Technical Support Cell (TSC)	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

Findings

The organisational setup of PHMA is similar to the preceding organisation of PRGMEA. This industry sub-sector is concentrated at Karachi, Lahore, Faisalabad and Sialkot with a membership base of mainly small and medium enterprises. The organisation maintains a central office and zonal offices (south) in Karachi, (north) in Lahore and regional offices northern zone in Faisalabad and Sialkot. The association has a large share of the industry representation and is very active. Its management and office bearers are abreast of the changing skill requirements for enhancing productivity and quality and are adjusting accordingly by inducting new technologies and materials.

The association in cooperation with the Ministry of Textile Industry established Pakistan Knitwear Training Institute (PKTI) in Lahore in 1994 as public-private-partnership. The institute has a fully equipped stitching lab, knitting lab, dyeing lab and a computer lab and is running different courses to cater the needs of the industry. In Karachi, the PHMA zonal office has established a Technical Support Cell equipped and qualified to provide support in technical testing, energy efficiency & management, environmental management and training for industry professionals. The association also works in close cooperation with PRGMEA and is using the training facilities and programmes of PRGTTI in Karachi and Lahore.

PHMA recognizes the importance and need of training in both practical and theoretical knowledge and has successfully designed short courses accordingly to bridge the skills gap in all sectors of the knitwear industry. PKTI offers three types of programmes: skills training 2–12 months duration (18 courses); diploma courses, e.g. garments manufacturing, fashion designing, apparel manufacturing & branding, etc. and further training courses 2-3 days duration of various subject related to manufacturing, marketing, management, import/export issues, financing, taxation, etc.

Conclusions, Recommendations, Road Map

The cooperation with PHMA will include the areas of Karachi, Lahore, Faisalabad and Sialkot. Similar to PRGMEA; Synergies are possible and the cooperation with TSSP was appreciated by the association & training centres alike and is therefore, highly recommended.

Next steps:

- Initial meetings (internal/external) are necessary in order to identify the working mechanisms related to the central office, Karachi and zonal offices at Karachi and Lahore and regional offices in Faisalabad and Sialkot.
- The skills gap and training needs identified are generic and need to be specified and ranked according to the production lines and shop-floor levels; depending on the region, product specification and size of the industries.
- To avoid duplication of and/or conflicting communication and implementation structures with PHMA chapters, the plan of action and the project management system of Punjab, Sindh needs to be decided and organised.

Towel Manufacturers' Association of Pakistan, Karachi

Organisational Profile

Item	Details		
Name	Towel Manufacturers' Association (TMA) of Pakistan, Karachi		
Address/Headquarter	TMA House , 77-A , Block 'A' Sindhi Muslim Cooperative Housing Society Karachi - 74400 Phone: (+92)-(021)-34382801-4; Email: tma@towelassociation.com Fax: (+92)-(021)-34551628; Website: http://www.towelassociation.com		
Organisational form	Autonomous Institution of Public Interest, "Trade Body".		
Legal status	TMA is a trade body under the Trade Organisations Ordinance 1961 registered vide SRO No. 684(1)/81 dated 27th June 1981.		
TMA sub-offices	<table border="0"> <tr> <td style="vertical-align: top;"> <p>Southern Circle Office TMA House , 77-A , Block 'A', Sindhi Muslim Cooperative Housing Society Karachi - 74400 Phone: (+92)-(021)-34382801-4 Fax: (+92)-(021)-34551628 Email: tma@towelassociation.com</p> </td> <td style="vertical-align: top;"> <p>Northern Circle Office (<i>Punjab & Pakhtunkhwa</i>) 388-A, Tariq Block, New Garden Town, Lahore-Pakistan Phone: (+92)(042)35846228 Fax: (+92)-(042)35846229 Email: nc@towelassociation.com</p> </td> </tr> </table>	<p>Southern Circle Office TMA House , 77-A , Block 'A', Sindhi Muslim Cooperative Housing Society Karachi - 74400 Phone: (+92)-(021)-34382801-4 Fax: (+92)-(021)-34551628 Email: tma@towelassociation.com</p>	<p>Northern Circle Office (<i>Punjab & Pakhtunkhwa</i>) 388-A, Tariq Block, New Garden Town, Lahore-Pakistan Phone: (+92)(042)35846228 Fax: (+92)-(042)35846229 Email: nc@towelassociation.com</p>
<p>Southern Circle Office TMA House , 77-A , Block 'A', Sindhi Muslim Cooperative Housing Society Karachi - 74400 Phone: (+92)-(021)-34382801-4 Fax: (+92)-(021)-34551628 Email: tma@towelassociation.com</p>	<p>Northern Circle Office (<i>Punjab & Pakhtunkhwa</i>) 388-A, Tariq Block, New Garden Town, Lahore-Pakistan Phone: (+92)(042)35846228 Fax: (+92)-(042)35846229 Email: nc@towelassociation.com</p>		
Brief history, founding year, etc.	TMA was locally formed in Karachi and recognized by the Ministry of Commerce in May 1972. In 1976 the group was elevated to the status of an Association on All Pakistan basis and was registered in 1976 with SEC of Pakistan as Joint Stock Company. The association works to support the industry establishments involved in manufacturing towels, terry towels and allied products in Pakistan. It has around 180 active members and the company size vary between 300 to more than 2000 employees.		
Purpose	Representing the industry sector vis-à-vis the government; advocacy and business promotion; self-regulation and providing a range of member services.		
Financing	Membership dues, service fees, donations from industries, etc.		
Staff			
Services	<p>Management and distribution of quota of towels, terry fabrics & others; Issuing certificates of origin; certificates (T-2) for sanction of business travel Organising and supporting of trade delegations, national and international trade fairs, conference events and symposia; Import/export facilitation, online electronic export manifest processing, etc.;</p> <p>Information dissemination on new technologies, trade regulations, legal developments, labour laws, etc.</p> <p>Operating a useful webpage and electronic member information: members list. Trade Delegations abroad participation of our member in international fairs, exhibition and conference calendar;</p> <p>Organising and implementing further training courses and HR development, e.g. International Labour Standards (ILS), renewable energy and rational use of energy, energy audit, new technologies in textile manufacturing and processing, etc.</p> <p>Operating the affiliated textile training institute (SMARTI) SMA Rizvi Textile Institute (SMARTI), Korangi Industrial Area, Karachi;</p>		

Findings

TMA represents the home textile sector of the country which constitutes about 1% in GDP. It generates revenue of approximately USD 1.5 billion and pay direct taxes of about

PkR.1.5 billion. The association has a training centre, SMA Rizvi Textile Institute in collaboration with the Ministry of Textile Industry for producing skilled man power. The institute is currently offering diploma level courses in various fields however, they have identified the need to launch skill development programme for the shop floor and blue collar level. They are currently facing the challenge of hiring and retaining blue-collar staff offering competitive remunerations. They have shown interest in partnering with TSSP to tackle this issue for production and maintenance staff.

Conclusions, Recommendations, Road Map

Home textile being a high value-added textile has potential to grow locally and internationally. After discussion with the executive committee of the TMA it was felt that they are facing difficulty and it is becoming a challenge for them to get skilled blue collar and maintenance staff. The executive committee has shown interest to join the TVET reform support for the development of skilled human resource.

Next steps:

- Brainstorming session to be carried out with TMA to assess the capacity building needs of association and SMARTI and translate the findings through devising terms of reference for future course of action.
- Carry out training need analysis of the sector in collaboration with members and identify the gaps including the current capacity and training profile of associated institute. .
- Identify the short courses that can be started at SMARTI
- Support SMARTI in organising required training programmes and set-up related training facilities.

Pakistan Automotive Manufacturers Association

Organisational Profile

Item	Details
Name	Pakistan Automotive Manufacturers Association (PAMA)
Address/Headquarter	1st Floor, Block-C, Finance & Trade Centre, Shahra-e-Faisal, Karachi. Pakistan Telephone: (+92)-(021)--35630992, 35630993; Fax: (+92)-(021)-35630995; Email: pamaftc@hotmail.com
Key contact/ focal person(s)	Mr. Hirofumi Nagao, Chairman Mr. Saquib H. Shirazi, Senior vice Chairman Mr. Mr. Yoshihiro Kondo, Vice Chairman Mr. Abdul Waheed Khan, Director General Chairman
Organisational form	Non-profit organisation – Industrial Sector Association Autonomous Institution of Public Interest, “Trade Body”.
Legal status	Licensed by the Ministry of Commerce / Trade Organizations Ordinance 2007 and registered under the Companies Ordinance 1984 as a company with limited liability.
Financing	Membership Fee, donations from industries
Brief history, founding year, etc.	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. About 750 establishments are registered under the sector: 100 large, 200 SME and 450 smaller units focusing on after sales market only. Employment generated amounts to about 220,000 persons.
Purpose	To safeguard interest of members To play central role in all policy making process of the government for the automotive industry of country To enable Pakistani auto industry becoming global player To provide the members high quality professional service & create excellent communication amongst members To be the principal source of statistical data on the entire automotive industry of the country To play its role to foster harmony and accord amongst all stakeholders

Findings

This association was initially not earmarked for or contacted during the recent identification mission. However, because of the large development trust and growth potentials of the automobile production sector and its large additional workforce needs, it is highly recommended to partner with the association.

Conclusions, Recommendations, Road Map

Introductory and consultative meetings are necessary with the association as well as selected industries and support institutions. The industry has a system of on-the-job and off-the-job training arrangement for improving the skill profile of labour force, which needs to be assessed further for cooperation and experiential knowledge. The prospect of

enterprise-based CVT programme needs to be explored with association through meeting and establishing bi-lateral contacts.

Next steps:

- Further desk review of the sector, its companies and location as well as the related organisational structure (chambers, associations, line ministry, support institutions, etc.) is needed to obtain a comprehensive picture of the industry sector and identify potential and workable entry points
- Schedule consultative meetings with the association, related sub-committees and industry establishments for initial talks and information dissemination
- To establish a joint task force (max. 3-5 persons) at the association level as focal point and to work out the conceptual approach as well as further details of the cooperation
- Prepare a plan of action stating priorities, trades, NVQF levels, training partners/venues, time line, management and implementing mechanisms, etc.

Pakistan Association of Automotive Parts and Accessories Manufacturers

Organisational Profile

Item	Details		
Name	Pakistan Association of Automotive Parts and Accessories Manufacturers (PAAPAM)		
Address/Headquarter	PAAPAM Head Office 16-B, Westwood Colony, Thokar Niaz Baig, Lahore. Tel # (+92)-(042)-37498474-5 Fax #(+92)-(042)-37498476 Website: www.paapam.com		
Key contact/ focal person(s)	<table border="0"> <tr> <td>Mr. Mashood Ali Khan Chairman PAAPAM South Office 204, 2nd Floor, Suleman Centre, SC-5, ST-17, Sector 15, Korangi Industrial Area, Karachi, Pakistan Tel # (+92)-(021)--35113841, Fax # (+92)-(021)--35113842 E-mail: chairman@paapam.com</td> <td>Mr. Saeed Iqbal Ahmed Khan Sr. Vice Chairman PAAPAM Head Office 16-B, Westwood Colony, Thokar Niaz Baig, Lahore, Pakistan Tel # (+92)-(042)-37498474-5 Fax #(+92)-(042)-37498476 E-mail: s.vicechairman@paapam.com</td> </tr> </table>	Mr. Mashood Ali Khan Chairman PAAPAM South Office 204, 2nd Floor, Suleman Centre, SC-5, ST-17, Sector 15, Korangi Industrial Area, Karachi, Pakistan Tel # (+92)-(021)--35113841, Fax # (+92)-(021)--35113842 E-mail: chairman@paapam.com	Mr. Saeed Iqbal Ahmed Khan Sr. Vice Chairman PAAPAM Head Office 16-B, Westwood Colony, Thokar Niaz Baig, Lahore, Pakistan Tel # (+92)-(042)-37498474-5 Fax #(+92)-(042)-37498476 E-mail: s.vicechairman@paapam.com
Mr. Mashood Ali Khan Chairman PAAPAM South Office 204, 2nd Floor, Suleman Centre, SC-5, ST-17, Sector 15, Korangi Industrial Area, Karachi, Pakistan Tel # (+92)-(021)--35113841, Fax # (+92)-(021)--35113842 E-mail: chairman@paapam.com	Mr. Saeed Iqbal Ahmed Khan Sr. Vice Chairman PAAPAM Head Office 16-B, Westwood Colony, Thokar Niaz Baig, Lahore, Pakistan Tel # (+92)-(042)-37498474-5 Fax #(+92)-(042)-37498476 E-mail: s.vicechairman@paapam.com		
Organisational form	Non-profit organisation – Industrial Sector Association Autonomous Institution of Public Interest, “Trade Body”.		
Legal status	Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association		
Financing	Membership fees, donation, projects, promotions, etc.		
Brief history, founding year, etc.	<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 to cater 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 start to develop rapidly.</p> <p>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 1200 members who are producing parts of Cars, Motorcycles, Tractors, Trucks and Buses.</p> <p>About 750 establishments are registered under the sector: 100 large, 200 SME and 450 smaller units focusing on after sales market only. It supports employment to about 220,000 persons.</p>		
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 modernisation 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 and supports the industry through</p> <ul style="list-style-type: none"> Providing information to its members about the international exhibitions, marketing opportunities etc. arranging an international exhibition in Pakistan called “International Auto Show” on regular basis arranging delegates of the member industries for international trade exhibitions 		

Findings

The automobile industry is wide-ranging as it encompasses multiple engineering technologies. Automobile is an integrated product developed through several processes, technologies and materials to create a complete product. The auto part manufacturing industry must comply with the standards, precision and production methods mandated by the automobile industry.

This requires specialized skills for the work force at the original car manufacturer as well as the supply industry. PAAPAM has initiated and developed a Pakistan Skill Development Centre (PSDC) in Karachi to up-grade the skill level of the staff of member companies through local and international trainers. However, they still feel a need to have a collaboration to develop skills at grass root level in manufacturing and for after-market customer and maintenance management.

Conclusions, Recommendations, Road Map

PAPAAM has formulated for sector and their members very determined growth targets by focusing on three areas: (i) improved aftermarket service, (ii) product diversification and (iii) bringing in more joint ventures. The growth that is being projected in the automobile sector will require an adequately skilled work force and the executive committee is conscious about it. The association is interested to work and collaborate with TSSP to align their growth plans with the corresponding HR supply.

Next steps:

- PAPAAM has hired a dedicated staff at PSDC that can probably be trained to manage the TVET/CVT programme. A detailed discussion needs to be arranged with the executive committee to discuss the possibility of capacitating the staff of association on TVET/CVT.
- Need a dialogue to agree on roles and responsibilities and the support requirement that can be provided to implement the programme.
- Identify the direct training needs and trades of the industry and link it with the available training institutes and the available qualifications.
- There is also a possibility to upgrade PSDC by offering some of the short courses and a capability assessment may be used for planning.

Pakistan Association of Printing & Graphic Arts Industry

Organisational Profile

Item	Details
Name	Pakistan Association of Printing and Graphic Arts Industry (PAPGAI)
Address/Headquarter	Room No. 214, 2nd Floor, Mashriq Centre, Opposite Faran Club, Stadium Road, Karachi - Pakistan. Phone : (+92)-(021) --34920175 Fax : (+92)-(021)-34926625 E-mail : papgaipk@yahoo.com Web page : http://papgai.wixsite.com/papgai
Key contact/focal person(s)	Mr. Irfan Ahmad, Chairman Mr. Basit M.A.Zaidi, Senior Vice Chairman Mr. Salman Haroon – Member Executive Committee
Organisational form	Autonomous Institution of Public Interest, "Trade Body".
Legal status	PAPGAI is registered with Ministry of Commerce and incorporated with Securities and Exchange Commission of Pakistan.
Financing	Membership fees, donations by industry, projects, etc.
Brief history, founding year, etc.	Pakistan Association of Printing & Graphic Arts Industry (PAPGAI) is the only representative body of Printing Industry of Pakistan which is registered with Ministry of Commerce & Industry and established on 21 December 1959 after receiving its license and is also incorporated with Securities and Exchange Commission of Pakistan. It is the member of Asia Print Organization. In Pakistan PAPGAI shall involve all the stake holders i.e. Govt. bodies, local administration, printing, packaging and graphic art industry, local & international associations, exhibitors, corporate sector, educational institutions, suppliers, industrial sector and trade visitors.
Purpose	The mission is to promote an image of respect, progress and "provider of mass employment" for the printing and graphic arts industry. To promote an environment of co-operation, learning and brotherhood amongst all industry members. To provide training opportunities through industry seminars and workshops. To assists our members to see and adapt to the FUTURE, while continuing to improve and profit in the PRESENT.
Services	It provides support to the industry by presenting the case with the government to form the policies for the survival of the industry. PAPGAI serves as a forum for interaction for all members of printing and graphic arts industry. It endeavours to create an environment of cooperation, learning and brotherhood amongst all members of the industry. Provide national and international linkages to promote the industry and business. It is also very active in looking for ways to improve the skill level of the work force by supporting the establishment of the Poly Technic Institute of Printing and Graphic Arts; organising CVT programmes with training providers.

Findings

Pakistan Association of Printing and Graphic Arts Industry is the sole representative body of printing industry in Pakistan. Currently the total value of the industry is USD 5 billion. In Pakistan, there are 15,000 printing units and the industry is the biggest employer after the textile sector. The printing sector is an important partner for the local industry, businesses,

administration and education in terms of making printing, packaging and publishing materials and is expected to grow by 8 to 10% per year.

PAPGAI is taking up a matter with the Government to reduce the duty on raw material for becoming cost competitive in the international market. According to PAPGAI currently the raw material has import duty but finished books are duty free. The printing industry has invested in the modern and expensive machinery in Pakistan. However, the related production and maintenance personnel are not available in the required quantity and quality.

Conclusions, Recommendations, Road Map

To cope with the issue, PAPGAI strongly supported the establishment of a College of Technology (Printing) at diploma level and has recently started a CVT programme for printing machine operators in partnership with AmanTech Training Institute. Successful trainees will have guaranteed jobs by the host company.

The executive committee is broad-minded and concerned about the increased HR need for the growing industry and are looking for support to build up their capacity. It includes the development of master trainers in the country.

Next steps:

- As they have been piloting the CVT model with AmanTech for a year now it is recommended to review its implementation.
- Identify the improvement areas, assess the capacity building needs and agree upon the partnership model along with the implementation plan.
- The CBT&A packages need to be developed and included in NVQF approved packages.

Pakistan International Freight Forwarders Association (PIFFA)

Organisational Profile

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)-(021)-34322671-3 Fax: (+92)-(021)-34322670 Email: piffa@piffapk.com URL: www.piffapk.com	
Key contact/ focal person(s)	Mr. Muhammad Ilyas Chairman PIFFA Tel: (+92)-(021)-34322671-3 Fax: (+92)-(021)-34322670 Email: piffa@piffapk.com	Mr. Habibullah A. Latif Secretary General Tel: (+92)-(021)-34322671-3 Fax: (+92)-(021)- 34322670 Email: piffa@piffapk.com
Organisational form	Non-profit organisation – Industrial Sector Association Autonomous Institution of Public Interest, “Trade Body”.	
Legal status	Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association	
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	PIFFA aims to provide effective representation and support for Pakistan freight services industry to observe the highest standards of professional competence. The association aims to achieve standardisation in the industry and to promote a high degree of professional conduct among its members, including ethics and financial viability. 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.	
Financing	Membership Fee, donations	
PIFFA - FIATA Diploma in Freight Forwarding	PIFFA is offering a diploma in freight forwarding that has been validated by FIATA (International Federation of Freight Forwarding Association's) 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	

Findings

PIFFA aims to provide effective representation and support for Pakistan’s freight services and logistics industry to observe the international standards of professional competence. PIFFA has started its own training centre in Karachi and a diploma course in International Freight Forwarding, having 14 modules, has started. The course provides basic knowledge of all functions of international freight forwarding. They are also planning to start the diploma course in Supply Chain Management. PIFFA plans to start a dialogue process with its members to set-up a mechanism where all members can share their work-force demand

and based on demand the training programmes can be organized through a centralised PIFFA desk.

Conclusions, Recommendations, Road Map

Sustainability of the economic growth of the country is strongly linked to the efficiency of the transportation and export/import system. It will increasingly become more important with the completion of the CPEC Project. The Pakistan International Freight Forwarding Association is determined to play an important role in the development of modern supply chain functions in the country which includes logistics, ware housing and customer services. Therefore, the association is promoting HR development and started their training centres in Karachi and Lahore.

Next steps:

- Explore the prospects of establishing a centralised desk to cater to the skills demand of its members. To support the association with training needs analysis of members and association staff and devise capacity development plans accordingly
- To initiate a dialogue for possible partnership on CVT model and employability and formulate ToRs for future course of action.

Pakistan Leather Garments Manufacturers and Exporters Association (PLGMEA)

Organisational Profile

Item	Details		
Name	Pakistan Leather Garments Manufacturers and Exporters Association (PLGMEA)		
Address/Headquarter	PLEGMEA Central, c/o National Institute of Leather Technology (NILT) St' 20, Sector7/A, Korangi Industrial Zone, Karachi Tel: 0300-8215089, General Secretary		
Key contact/focal person(s)	<table border="0"> <tr> <td> <p>PLEGMA Southern Zone Mr. Faisal Baig (Secretary General) Tel: (+92)-(021)-35116821 Email: sg@plegmea.pk URL: www.plegmea.pk</p> </td> <td> <p>PLEGMEA Northern Zone Mr. Mohammad Aslam, Chairman, Mr. Sh. Attique-ur-Rehman Ratra, Vice Chairman, BASF Building, Sialkot Tel: (+92)-(021)-3254401-3 Fax: (+92)-(021)-3254400 Email: plegmeaskt@gmail.com URL: www.plegmea.pk</p> </td> </tr> </table>	<p>PLEGMA Southern Zone Mr. Faisal Baig (Secretary General) Tel: (+92)-(021)-35116821 Email: sg@plegmea.pk URL: www.plegmea.pk</p>	<p>PLEGMEA Northern Zone Mr. Mohammad Aslam, Chairman, Mr. Sh. Attique-ur-Rehman Ratra, Vice Chairman, BASF Building, Sialkot Tel: (+92)-(021)-3254401-3 Fax: (+92)-(021)-3254400 Email: plegmeaskt@gmail.com URL: www.plegmea.pk</p>
<p>PLEGMA Southern Zone Mr. Faisal Baig (Secretary General) Tel: (+92)-(021)-35116821 Email: sg@plegmea.pk URL: www.plegmea.pk</p>	<p>PLEGMEA Northern Zone Mr. Mohammad Aslam, Chairman, Mr. Sh. Attique-ur-Rehman Ratra, Vice Chairman, BASF Building, Sialkot Tel: (+92)-(021)-3254401-3 Fax: (+92)-(021)-3254400 Email: plegmeaskt@gmail.com URL: www.plegmea.pk</p>		
Organisational form	Non-profit organisation – Industrial Sector Association All Pakistan Autonomous Institution of Public Interest, “Trade Body”.		
Legal status	Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association		
Brief history, founding year, etc.	PLGMEA was formed in November 2001 to protect, promote and develop the Pakistan Leather Garment Industry. During the last three years PLGMEA has been actively promoting the interest of its members regarding various trades, taxation and manpower related matters. < 135 members		
Purpose	<p>To protect, promote and develop Pakistan's leather and allied Industry.</p> <p>To consider and deal with all questions and matters concerning the manufacturing and trade of leather garments & allied industry to overcome difficulties or problems arising therein.</p> <p>To make representation to federal and provincial Governments, local bodies or any other body / department on the grievances and demands on behalf of the members.</p>		
Financing	Membership Fee, donations from industries		
Services	<p>To collect, maintain and distribute or supply such statistics, data and other information necessary for the uplift of the tanning and Leather made-ups Industry through letters, circulars, periodicals and press publicity.</p> <p>To organize local or international Fairs & Exhibitions to help the manufacturers of leather garments and related products.</p> <p>To establish and promote contacts in foreign countries and develop trade relations</p> <p>To procure from and communicate with any organization, trade and industry in Pakistan or abroad such information as may seem conducive to the attainment of the objectives of the association.</p> <p>To setup Research Institute for the development of leather garments & allied trade& Industry including the use and production of indigenous materials to make the country as far as possible self-sufficient and to take measures for the development of the leather garment & allied industry.</p> <p>To establish and run appropriate organisation for inspecting and certifying the quality of leather garments & allied products intended for export.</p>		
Training Institute	National Institute of Leather Technology (NILT), Plot No.ST-20, Sec 7-A K.I.T, Karachi. To meet the requirements of leather industry in terms of semi-skilled, skilled, technical and managerial human resource, a National Institute of Leather Technology (NILT) was established in 1998. NILT is managed by leading businessman, industrialists, and		

Findings

PLEGMEA is one of the all Pakistan associations representing member companies in various provinces. The head quarter is based in Karachi with two zonal offices: Southern Zone, Karachi; Northern Zone, Sialkot. The association cooperates closely with the Pakistan Tanners Association (PTA) and implements joint projects. As highly export and fashion-oriented sub-sector, the association demonstrates pro-active leadership in order to provide tangible services to their members.

The sector is facing increasing international competition and still has to cope with the environmental prejudices of Pakistan's tannery trade. The management stated its limitations to address the current issues of the industry effectively due to lack of knowledge and institutional capacity and is willing to enter into cooperation with TSSP. The qualification measures of labour force at all levels is high on the agenda of association. The reason is not only to develop skills of existing/additional workforce but also to enhance the productivity, quality and production capacity.

Conclusions, Recommendations, Road Map

It is proposed to mobilize and engage the clusters in Karachi and Sialkot due to the presence of training facilities in the area. National Institute of Leather Technology (NILT) in Karachi and the Leather Products Development Institute (LPDI) of Sialkot are assigned the role of training delivery, in case of establishing partnership with TSSP. Like in the other sub-sectors, the specific training needs and priorities are to be finalised at micro level according to the location and product range of the companies and then depending upon the trade, respective training institution may be located in collaboration with the association.

Next steps:

- Initial meeting with a concrete planning focus to be carried out with association and its members
- Capacitate association on the management plans and structures to initiate and implement activities in Sialkot and Karachi

Assess the training needs and propose not only skills, trades and levels but also extend requisite support in improving the HRD functions of NILT/LPDI to association

Pakistan Hotel Association

Organisational Profile

Item	Details
Name	Pakistan Hotel Association (PHA)
Address/Headquarter	<p>Suite # 01, Ground Floor, Shafi Court Merewether Road, Civil Lines Karachi-75530, Pakistan.</p> <p>Phone: ((+92)-(021)-35686407 Fax: (+92)-(021)-35688852 Email: info@pha.org.pk</p>
Key contact/focal person(s)	<p>Mr. Mustansir Zakir, Chairman Mr. Zubair Surti, Senior Vice Chairman</p>
Organisational form	<p>Non-profit organisation – Sector Association Autonomous Institution of Public Interest, “Trade Body”.</p>
Legal status	<p>PHA was first registered under Section 3 of the Trade Organization Ordinance, 1961 and the license was granted by the Ministry of Commerce. Under the Trade Association Act 2013, PHA was registered on 02 August 2013.</p> <p>Accredited by the Ministry of Tourism, this body is the only representative body of the hotel industry in Pakistan.</p>
Brief history, founding year, etc.	<p>Pakistan Hotels Association was established in 1963. All the leading hotels in Pakistan from One to Five Star are members of the Association. There are more than 150 members.</p> <p>PHA is the representative body of the hotel industry in Pakistan. PHA Member Hotels account for about 90% of the total inventory of gazetted hotel rooms in the country. PHA's Associate Members represent a cross section of related businesses including hotel product/equipment and services providers, restaurants, clubs and convention and exhibition organisers.</p>
Purpose	<p>The purpose of this association is to strengthen, promote and work with Ministry of Tourism for the development of tourism and to give advice to the government to promote Tourism in Pakistan. It is the platform, where PHA communicates between the stakeholders and the government. The association plays a vital role in advising the Ministry of Tourism as well as the Government of Pakistan and the Governments of respective provinces to resolve the matters pertaining to the hotel industry.</p>
Financing	<p>Membership Fee, donations from member companies, promotions & projects.</p>
Services	<p>Interaction with Members Dissemination of information Circulation of newsletters and other literature concerning the hospitality industry Organizing conventions, seminars, and symposia Conducting research on hotel and restaurant industry and updating members on latest developments Training of human resource in different spheres of hotel and restaurant activity Taking legal action in favour of members when member's interest and thereby the interest of the Industry is at stake Help in expansion and development of existing projects Being the authentic voice of the hospitality industry and lobbying for all relevant matters before the state and central government PHA has become recommending body to the State Bank of Pakistan for issuance of Foreign License to member Hotels Representation to the Ministry of Commerce, Tourism and Finance for implementation of industrial status of Hotel Industry</p>

Findings

The hotel industry was identified as one of the possible growth sectors and after discussions with association, the hotel sector is proposed as a possible partner of TSSP.

Conclusions, Recommendations, Road Map

Due to scarcity of information on the association and the hotel sector, follow-up activities are necessary to gather relevant information and establish the working contacts for TSSP.

Next steps:

- Planning and initiating a consultative meeting with PHA to present TVET III and the possible mode of cooperation and kind of support.
- Reaching an agreement on further steps and mechanisms to develop and structure the partnership and possible interventions.
- The association has member hotels in all provinces of Pakistan and a decision on the geographical spread or focus might be necessary.
- A number of training facilities are available but have not been assessed and discussed with the association. Similarly, familiarisation of in-house training arrangements of larger hotel chains is necessary in order to design possible qualification measures.
- Consolidation of the field visits results and information gathered and drafting of the plan of action for the hotel industry.

Pakistan Banks' Association

Organisational Profile

Item	Details
Name	Pakistan Banks' Association (PBA)
Address/Headquarter	D-126 (Near Chinese Consulate), Block 4, Clifton, Karachi, Pakistan Tel: (+92)-(021)--35822986-87, Fax No. (+92)-(021)-35823418, E-Mail: pba@pakistanbanks.org Web: http://www.pakistanbanks.org
Key contact/focal person(s)	Mohammad Aftab Manzoor Chairman – PBA; President & CEO
	Syed Ahmed Iqbal Ashraf Vice Chairman - PBA
	Tawfiq A. Husain Secretary General - PBA
Organisational form	Private Limited Company
Legal status	Pakistan Banks' Association is registered with Securities and Exchange Commission of Pakistan as a Private Limited Company.
Brief history, founding year, etc.	PBA represents the Pakistan Banking Industry and was established in March 1953. Membership is institutionalized and is available only to the Banks operating in Pakistan. Currently there are 45 members, categorized into six groups. Its governing body is an Executive Committee (EC) comprising of 14 members, represented by the Chief Executives of the respective member institutions. PBA's Principal Executive is the Chairman of the Executive Committee, elected periodically from within the EC. Presently, PBA has 11 functional Sub Committees, each chaired by a member of the Executive Committee.
Purpose	Its main objective is to coordinate the efforts of the banking industry, and to share a common vision of progress and development with its members.
Financing	Membership Fee, donations from member companies, promotions & projects.
Services	Providing services to members, the business community and government administration via an elaborate internet presentation regarding: Pakistan Stock Exchange, Data & Publications, Regulatory Bodies, Industry and Economy, Career and Development, Classified Section, Events & Highlights, Downloads. Entrusted by the State Bank to formulate regulations for the banking industry. Regulating and monitoring services provided to the banking industry by outside service providers. Main service providers include 'Professional Values' (appraise the value of assets collateralized to banks) and security agencies offering security services to the banking industry.
Training Institution	The Institute of Bankers Pakistan (IBP) was established in 1951. Objectives are directed at the professional development of bankers. It holds banking diploma examination, organizes training courses, lectures and seminars, conducts research studies and publishes books, study aids, lesson notes, journal, brochures on subjects of topical interest and importance. Head Office: Moulvi Tamizuddin Khan Road, Karachi - 74200, Pakistan. Phone : (+92)-(021)-5684575- 5686955- 5680783- 5689718- 5687515- 5689364 Fax : (+92)-(021)-5683805 Email bp@ibp.org.pk

Findings

The Banking sector was identified as one of the possible growth and employment sectors especially for females. The sector, after initial desk reviews and discussions with association, stipulates partnership prospects for TSSP.

Conclusions, Recommendations, Road Map

There was a limited interaction with the association and selected banks during the identification mission, therefore, follow-up activities are necessary to gather the relevant information and establish working contacts.

Next steps:

- Plan and initiate a consultative meeting with PBA for TVET reforms and to identify the possible mode of cooperation and kind of support.
- Reach an agreement on further steps and mechanisms to develop and structure the partnership and possible interventions.
- The association has member banks in all provinces of Pakistan and a decision on the geographical spread or focus might be necessary.
- A number of training facilities are available but have not been assessed and discussed with the association. Similarly, familiarisation of in-house training arrangements of the banks is necessary to design possible qualification measures.
- Consolidation of the field visits results and information gathered and drafting of the plan of action for the banking industry.

Karachi Chamber of Commerce and Industry

Organisational Profile

Item	Details
Name	Karachi Chamber of Commerce and Industry (KCCI)
Address/Headquarter	Aiwan-e-Tijarat Road, Off: Shahrah-e-Liaquat, Karachi-74000 Phone: (+92)-(021)-99218001-09 Fax: (+92)-(021)-99218040 E.mail: info@kcci.com.pk , secretary@kcci.com.pk Website: www.kcci.com.pk
Organisational form	Autonomous Institution of Public Interest, "Trade Body". Established in 1959 through the amalgamation of four trade bodies in Karachi: The <i>Pakistan Merchants Association</i> , <i>Buyers and Shippers Chamber</i> , <i>Chamber of Commerce Pakistan</i> and <i>All Pakistan Chamber of Commerce & Industry</i> .
Legal status	KCCI is duly registered under the Trade Organisation Ordinance 1961.
Chapters /Affiliation	Affiliation: Federation of Pakistan Chamber of Commerce & Industry . Memberships: British Chamber of Commerce, Bombay Chamber of Commerce, Australian Chamber of Commerce, Japan Chamber of Commerce & Industry.
Financing mechanism	Membership fees, donations, projects, promotions, etc.
Members	KCCI has two classes of membership: <i>Members</i> and <i>Town Associations</i> . Currently the Chamber has around 20,000 direct members both industrialists and traders and 7 Industrial Town Associations: S.I.T.E. Association of Industry, Landhi Association of Trade & Industry, Korangi Association of Trade & Industry, Federal 'B' Area Association of Trade & Industry, North Karachi Association of Trade & Industry, S.I.T.E. Superhighway Association of Industry, Bin Qasim Association of Trade & Industry bringing the Chamber's effective membership to around 50,000 establishments.
Purpose	Vision: "To be recognized as the leading voice of the Karachi business community" Mission: "To advance human progress through an economic, political and social system based on individual freedom, incentive, initiative, opportunity, and responsibility."
Management	Policies and programs are determined by the 30 members of the Managing Committee which are elected by the members. Two seats are reserved for Women Entrepreneurs. One seat each is reserved for representatives/nominations from the affiliated seven industrial town associations. The President is elected by the members (General Body) and the Managing Committee elects every year the Senior Vice President and the Vice-President. The President controls the working of office and staff and directs all matters of the Chamber, with the assistance of the Senior Vice-President and Vice-President. The chamber has 19 Standing Committees and 4 Special Committees to address the various issues of the business community.
Staff	S. M. H. Rizvi, Secretary General; M. Fareed Khan, Deputy Secretary General; M Arif Shaikh, Director IT; Asif Polani, Director Finance; Uzma Tasleem, Director Research; Aamir Hassan, Director Media; Syed Sohail Akhtar, Joint Secretary supported by respective fulltime staff.
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.

Findings

The Karachi Chamber of Commerce & Industry is an autonomous institution of public interest. Based on its own legal entity, the chamber has the power to represent the entire

business sector in Karachi. Per provisions of the Chamber Law, all natural and legal persons, having their headquarters, branch or representation office to exercise any commercial, industrial, vocational or professional activity in the Karachi area must join the Chamber and get their membership certificates. In this respect, KCCI might be a future promotional and/or implementing partner to support initial and further vocational training activities.

According to the introductory meeting held on November 24, 2016 with the President, Mr. Shamim Ahmed Firpo, Mr. Asif Nisar, Senior Vice President, Mr. Muhammad Younus Soomro, Vice President and 10 office bearers of various committees, the Chamber is willing to cooperate with the TSSP and is prepared to enter into a cooperation mode. In addition, the chamber can support the programme in promoting HR development to the business community using existing or new PR forms of the organisation: e.g. organising symposia and business forums, information dissemination, participation in trade fairs and exhibitions, publishing of articles and advertisements in the bi-monthly chamber periodical “Economic Horizon”, etc.

Conclusions, Recommendations, Road map

The Chamber is aware of the TVET Sector Support Programme and extended cooperation to NAVTTC for the identification of trade experts, to be selected and trained, as CBT Assessors. The chamber is not formally involved in any form of interaction with the TVET system and believes that it cannot play a productive role in skills training i.e. NVQF level 1-4. The role of chamber might be generic and overarching in skills training; a more specific role can be played by sector associations due to the strong involvement of industries.

Follow-up meetings with chambers are required for better understanding of roles and responsibility; capacity building needs assessment and level of structural support and engagement so that they can effectively contribute in reforming the TVET system. The chamber welcomed the possibility of organising TVET awareness and promotional workshops.

The chamber periodical “Economic Horizon” can be furnished with articles and pictures on news/events around TVET Sector Support Programme, CBTA and CVT approach and progress. Advertisement may be placed (e.g. participation of firms, enrolments of trainees, events, etc.) in relations to TSSP activities. Other modes might be checked and selected if appropriate, e.g. targeted mailings to selected industries, support to organise forums and business meetings, TVET/CBTA/CVT presentation at trade fairs and exhibitions, introduction to sectoral associations, etc.

Next steps:

- Schedule and arrange appreciation and awareness workshops.
- Maintain regular interaction with chamber and schedule follow-up meetings to further discuss the mode and level of interaction with TSSP.
- Constitute dedicated task force to initiate and steer the process.
- Assess the capacity building needs of the chamber to improve and widen the membership services and explore the possibility of closer cooperation and interaction with the TVET system.

Overseas Investors Chamber of Commerce and Industry

Organisational Profile

Item	Details
Name	Overseas Investors Chamber of Commerce and Industry (OICCI)
Address/Headquarter	Chamber of Commerce Building, Talpur Road, P.O. Box 4833, Karachi 74000, Pakistan Phone: (+92)-(021)-32410814-5 Fax: (+92)-(021)-32427315 E-mail : info@oicci.org ; Website: www.oicci.org
Key contact/focal person (s)	Mr. Abdul Aleem, Secretary General, Mr. Moin Muhajir Deputy Secretary General
Organisational form	Established in 1860, Overseas Investors Chamber of Commerce & Industry (OICCI) serves as a platform to promote foreign investments thereby playing a major role in the growth of commerce and industry in the country. As the oldest and largest investment Chamber, OICCI draws on a diverse membership both in terms of sector and geography.
Legal status	OICCI is a company originally registered in 1925 and currently registered under the Companies' Ordinance 1984.
Members	The current 196 members representing 35 different countries and 14 different sectors of trade and industry.
Financing	Member ship fees, donations, projects
Purpose	Vision: "To be the premier body for promoting new and existing overseas investment in Pakistan by leveraging the world-class expertise of OICCI Members for the benefit of the Investor and the Country." Mission: To assist in fostering a conducive, open and equitable business environment in Pakistan To facilitate transfer of best global practices to Pakistan To enhance the image of overseas investors in Pakistan, and the image of Pakistan in overseas business communities.
Management	Policies and programmes are determined by the 14 members of the Managing Committee which are elected by the members. There are 7 sub committees that work on different subjects.
Staff	Mr. M. Abdul Aleem – Secretary General, Ms. Sakina Chakera – Senior Research Officer, Mr. Shaiq M. Qureshi – Communications Officer, Mr. Agha Ashraf – Assistant Manager Corporate Affairs Mr. Mahmood Ali – Office Assistant, Mr. Moin Mohajir – Deputy Secretary General & Head of Finance, Mr. Dodo Raja – Manager Finance, Mr. Waqar Arif – Senior IT Officer
Services	The OICCI maintains a comprehensive member directory, offering relevant information to the public and additional information to OICCI members. In addition to this, the OICCI has a library of research and published documents on various industries and government policies. It routinely conducts surveys to understand the current marketplace, offering members valuable resources. They also prepare proposals for the benefit of members as recommendation for the Country budget

Findings

The OICCI is engaged in the promotion and protection of existing foreign investment in the country and to attract new foreign investment and its diverse activities contributing

significantly to support commerce and industry across the country. Overseas Investors Chamber of Commerce & Industry (OICCI) serves as a platform to promote foreign investments thereby playing a major role in the growth of commerce and industry in the country.

Being one of the oldest and largest investments Chamber, OICCI has a diverse membership both in terms of sector and geography with the current 196 members representing 35 different countries and 14 different sectors of trade and industry.

OICCI appreciated the efforts that are being put in by TSSP; however they were surprised that they have never heard about the program or about GIZ, despite several of their member organization having participated in the CVT program. They believed that the programme needs more branding.

Conclusion, Recommendations, Road Map

OICCI will not be willing at this point to enter any partnership on TVET/CVT but they will invite TSSP to participate in their general body meetings to talk to the members and create awareness of the programme. They have further extended their support in promulgating the knowledge about TVET to its members including invites for any workshops and conferences.

OICCI is an important chamber with all the foreign investment organisations, being its members. It is being operated in a very professional manner and can play a significant role in the TVET delivery; provided they are convinced on the importance of the programme and its linkage with their mandate.

Next steps:

- Organize an awareness session at OICCI on TVET for member organisations.
- Regular interaction with OICCI management and follow-up meetings.
- Organize a conference on TVET and its benefits for OICCI members to increase their understanding of the programme and its role in addressing individual needs.
- Conduct a pilot project with some of the OICCI member organisations and project the success.
- Cascade the success among other members through joint promotional workshops and sessions.

Hyderabad Chamber of Commerce and Industry

Organizational Profile

Item	Details
Name	Hyderabad Chamber of commerce and Industry (HYCCI)
Address/Headquarter	P.O. Box # 99, Aiwan-e-Tijarat Road, Saddar, Hyderabad. Phone: (+92)-(022) -- 2784972-5 Fax: (+92)-(022) --2784977 E-mail : info@hydci.com Website: www.hyddci.com
Key contact/focal person (s)	Mr. Turab Ali Khoja, Senior Vice President
Organisational form	Hyderabad Chamber of Commerce and Industry is responsible for the interest of the industry and trade in and around Hyderabad.
Members	It has 200 regular and 1200 associate members.
Management	Policies and programs are determined by the 26 members of the Managing Committee which are elected by the members.
Staff	Mr. Mohammad Ali Chang–Secretary General with 4 members support staff.
Services	To protect the interest of the member organizations through coordination with the Federation and Government.

Findings

Hyderabad is the second largest city in Sindh and fifth largest city in Pakistan. The Chamber has 200 direct members and 1,200 associate members. The Chamber covers the membership within and around Hyderabad covering Kotri and Nooriabad. The Hyderabad Chamber has members that cover 40% of the motor cycle industry of country and the second largest industry of Khadi (Textile). There are fifteen assemblers of motorcycles in Hyderabad.

The chamber has collaborated with TUSDEC to set-up an Engineering Support Centre with an aim to bridge the skills gaps, specifically high-tech machine operations. The centre will be a teaching factory with modern machines and equipment including CNC machines for training.

Conclusions, Recommendations, Road Map

The Hyderabad Chamber is significant due to the strong representation of automobile industry as its members. In addition, it has felt the skills gap prevailing in the industry and has realized the skill development need that resulted in its collaboration with TUSDEC for the training institute. It is recommended to collaborate with Hyderabad Chambers for the TVET Sector Support Programme. They have shown interest for possible partnership but needs clarity on roles and responsibilities of the various stakeholders.

Next steps:

- Arrange and carry out a meeting with Hyderabad Chamber and TUSDEC to discuss the possible partnership model for setting-up the system in conjunction to current the TVET reforming.

- Carry out training need analysis of the chamber, the centre and member companies to assess the capacity building needs and skills gaps for further training and development.
- Formulate ToRs on the roles and responsibilities and structural arrangements for launching CVT model through chambers and the centre.
- Create awareness among members of the chamber on current TVET reforms and its importance for the private sector for wider acceptability and participation.

German Pakistan Chamber of Commerce & Industry

Organisational Profile

Item	Details
Name	German Pakistan Chamber of Commerce and Industry
Address/Headquarter	2nd Floor, Plot 7-E, 9th Zamzama Commercial Lane, Phase 5, D.H.A., Karachi, Pakistan Phone: (+92)-(021)-35371588 Fax: (+92)-(021)-35837419 E-mail : info@gpcci.com.pk ; Website www.gpcci.com.pk
Key contact/ focal person (s)	Mr. Ines Chabbi – Secretary General
Organisational form	Autonomous Institution of Public Interest, “Trade Body”. GPCCI shares the mission to promote, develop and further the economic well-being of members by providing a collective voice in advocacy to represent and protect member’s interest
Legal status	Registered with Director General Trade Association
Financing	Membership dues, donations, promotional activities
Members	136
Purpose	Objectives of GPCCI: Co-ordinate economic promotion activities between Germany and Pakistan. Act as a first point of contact for visiting German firms Improve Pakistan’s image and potential as a business destination Liaise with business forums and trade associations of both countries Exchange of information and contacts
Management	The policies and programmes are determined by President, Senior Vice President, and Board of Directors; Secretary General along with 3 office bearers.

Findings

German Pakistan Trade and Investment (GPTi) was initially formed with an objective to lay down the proper legal and business framework for the chamber. It took the level of Chamber in 2016. GPCCI is a bilateral chamber to support its members by offering range of services aimed at facilitating bilateral trade and direct investment. The German-Pakistan Chamber of Commerce and Industry (GPCCI) provides membership to all German companies in Pakistan, Pakistani companies working with German products and Pakistani companies trading with Germany. They also focus on their members needs to enhance competitiveness and success in businesses. They also provide services including representation, networking, information services, business and trade development, training and consultancy services, membership development, etc.

Conclusion, Recommendations, Road Map

GPCCI has been approached by TSSP in the past to start the Dual Training System. There have been multiple meetings and GPCCI is willing to kick off the programme with a concrete action plan. The chamber is well acquainted with the objectives and accomplishments of TSSP due to the involvement of its several members in CVT projects. It is a low hanging fruit and is capable of yielding quick-wins for TSSP.

The chamber is willing to act as the lead agency for TVET and intends to continue the CVT programme and trades, initiated under TSSP, in cooperation with the German-based member companies. The organisation plans to setup the required management system (CVT manager) for TVET and is in the process of hiring a dedicated resource. GPCCI is in the process of developing the system; therefore, TSSP may extend requisite support in managing CVT programmes and capacity building of staff for sustainable and effective TVET delivery. The present Steering Committee of the chamber needs to be redesigned and rationalised to serve as a CVT committee within the framework of the CVT approach.

Next steps:

- GPCCI is looking forward to the possibility of setting up an HR department, which will ensure TVET planning and delivery. The prospect to establish a dedicated skill development desk within HR department for CVT related activities may also be explored in the follow-up meetings.
- Devise ToRs on the roles and responsibilities and structural arrangements for chamber to effectuate TVET planning and delivery.
- Schedule working meetings with the GPCCI Board/executive committee and the present steering committee to finalise the mode of cooperation and accordingly prepare the action plans.

Conclusion and recommendations

1. The sectors and sub-sectors identified in the province of Sindh are in line with government policies, EU programme documents of TSSP and the selection criteria developed for the purpose.
2. All the listed sectors/sub-sectors are facing the challenge of increased national and international competition and are looking for means to enhance productivity and quality in a cost effective way. Most of small and medium enterprises are reluctant to make capital investment in technological and process improvement due to rapid changes so they are prepared for investing in skilled human resource for cost effectiveness and persistent returns.
3. There are certain sectors like printing and home textile manufacturing who are facing the dearth of skilled manpower especially operators and maintenance technicians; to operate the modern and state-of-the-art machinery and equipment. Manufacturing industry is facing a cross-cutting issue of shortage of adequately trained and experienced PLC and CNC specialists.
4. The employment potentials assessed by the industries, related studies and reported during factory visits and meetings with associations and chambers seem to be reasonable and realistic. The requirements can be narrowly skewed but they are reported mainly due to the sectors' growth and the constitution of additional employment opportunities. Work-based training programmes are generally welcomed by the respondents. The need to upgrade the existing workforce was repeatedly stated by the employers with the assumption that employees might be reluctant to participate in skill upgradation programmes.
5. It is assessed that most of the employment opportunities in the manufacturing sector are related to NVQF level 1-3 and considerably less opportunities available for NVQF level 4-6. However, the services sector (logistics, customer service, freight forwarding, banking, insurance, etc.) mostly employs college and university graduates.
6. Upward career progression to higher tiers for the manufacturing industry staff is almost none due to absence of required qualifications. Consequently, college and university graduates are hired for mid and higher tiers, however, they have to undergo a long internship/orientation period (1-2 years) to take up their responsibilities due to little exposure and experience of related work practice. It is recommended to design cooperative study programmes not only for semi-skilled or skilled workers but also for college/university graduates i.e. NVQF level 5-7.
7. Relevant trade associations and chambers were visited and TVET Sector Support Programme was briefly introduced. The organisations are very much open for cooperation and are willing to join the programme. The contacted organisations have a strong membership base and are vibrant and active. However, the current programmes and qualifications are not aligned to the organisations and these entities also lack the requisite set-up to address the prevailing skills gap. Only a few organisations have special committees related to HR & talent development. Thus, in order to address the dearth of skilled workforce, it is recommended to carry out awareness raising, capacity building and demand driven qualification development (NVQF 1-3).
8. Most trade association have a direct access and responsibility for a common service and training facility. Such establishments were setup by related line ministries or agencies 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 efficient and effective centre management and training organisation and implementation.

9. The usual set-up of common service and training facilities visited during the course of study resembles large industrial production systems, which can be used by the companies to augment their own production cycle without heavy investment costs. Many companies have old and outdated machines and equipment which are not suitable for training delivery. It is therefore recommended to have a careful equipment audit and assessment in cooperation with the respective association to introduce a concept for modernising the equipment or training delivery to meet the current and future demand of the industry.
10. Regarding training institution support and funding, special attention can be given to those establishments which are closely associated with and managed by the respective trade association. Focused interest by the stakeholders, lean management structures, fast decision-making mechanisms and self-funding ability are supporting factors for efficient and effective programme implementation and sustainability.

Priority recommendation is to work on the Sectors with high employment potentials, supportive business membership organisations, adequate training facilities and availability of CBTA, CVT training courses which are ranked as follows:

- Manufacturing, Light Engineering/Auto Parts, Car Manufacturing
- Manufacturing/Home Textiles, Readymade Garments
- Manufacturing/Leather Garments and Apparel
- Services/Logistics, Customer Service
- Service/Hospitality and Hotel

Steps forward

Trade identification at micro level

The present sector and sub-sector identification mission focuses on the “meso level” dealing with structures of regional economic segments and associated chambers and associations. Job opportunities, skills gaps and training needs identified are quite broad and project the general requirements of the respective industry. It needs to cascade to the second step at “micro level” which is - the involved companies and selected training institutions are specifying *concrete qualifications* to address; choosing the appropriate training methodology; assuring appropriate training facilities at partner institutions; learning environments and teaching cadre.

Workforce requirements were stated in broad terminology of trades, professions and functions, e.g. “maintenance technician”, “foreman, line manager, etc.” and recorded in the report as presented by the interview partners or in the documents consulted. This refers especially to the information provided in the column of “Trades/Professions” in the Sector Charts 3.1 – 3.7.

Therefore, in order to identify the concrete requirements, clarifications, specifications and formulation of action plans, it is required to have follow-up meetings with the cooperation partners along with individual planning sessions during the inception phase of TSSP.

Serious consideration was paid to have a fair balance between “Industrial Trades” and “Artisan Trades”. Industrial trades are mainly used in large scale manufacturing processes with dedicated workplace-related training and orientation. Qualifications related to industrial trades are often obtained by informal on-the-job training, semi-skilled level training and short courses. Skill competence and trade knowledge is quite focused and narrow and the trainees are mainly employed in the manufacturing industry and/or large scale production cycles. Typical skills include: Weaving Operator, Stitching Machine Operator, Shoe Laster, Stitcher, etc.

Artisan or craft trades are considered as an occupational competence requiring a longer training period (2–3 years) for qualifying a person to hold a trade certificate or diploma. Skill competence and trade knowledge is quite broad and persons can be engaged in more complex work situations and can also work independently. Trainees can work in small scale production/service shops or in maintenance/support units of larger factories or industrial settings. Typical trades include: Tool & Die Maker, Industrial Electrician, Domestic Electrician, Heat, Ventilation & Air-conditioning (HVAC), Mechatronics Technician, Car Mechanic, etc.

Apprentice-able trades in the Pakistan context are usual industrial and artisan trades which are approved and supervised by TEVTA, to be launched under the Apprenticeship Training

Programme. At present, STEVTA has approved 167 apprentice-able trades of which about 85 trades would be of interest or could be used in line with the identified training needs.⁷

Chambers

The Chambers contacted for the study are very positive to interact with the programme. Discussions were held at President and Vice President level, including some office bearers and the Secretary General. The Overseas Investment Chamber of Commerce and Industries found to be a little hesitant but it is anticipated that most of the member companies are also registered with regional chambers and/or trade associations and may benefit from the programme.

Overall, the interaction with chambers supported the general impression of showing minimum concern and awareness for a structured involvement in the TVET system and to take up responsibilities of workforce developments. On the contrary, the general attitude towards human resource development has improved in chambers and they are more open to address the issue as a part of their responsibility and as a membership service.

Recommendations

- The chambers need more information and awareness of their possible role to interact with and take advantage of the TVET system.
- Follow-up meetings need to be scheduled to further discuss the mode and level of interaction with TSSP.
- The chambers show more willingness to assess its capacity building needs to professionalise their membership service and interaction with the TVET system.
- It needs to be clarified in more detail to which extent the chambers will be or can be engaged in training measures of NVQF 1–3 or whether the respective trade association shall be the prime partners.
- Chambers shall be supported to setup or improve the HR and R&D departments to provide capacities in HR development, e.g. to conduct TNA as a membership service and for possible input to the TVET system.

Associations

The team visited four pre-selected trade associations and held meetings with senior office bearers and secretary generals. Three sub-sectors and corresponding associations were added later and reviewed by extended desk study. Visits and discussions need to follow with: Pakistan Auto Manufacturers Association (PAMA), Pakistan Hotel Association (PHA), and Pakistan Leather Garments Manufacturers Association (PLGMEA).

Pakistan Hosiery Manufactures Association (PHMA) and the ready-made garments association PRGMEA were visited in Lahore but contact with their Karachi headquarter (Central) and Karachi Chapter (Southern Zone) is necessary to establish the working contacts.

⁷ Annex 2: List of Notified Apprentice-able Trades, STEVTA.

Although professionally different, the associations are of quite similar structure and can be grouped together and dealt with in more generic terms. The organisations represent members of export-oriented and manufacturing businesses or which are active in economical important sectors, e.g. printing. The membership base is powerful and leadership is generally open-minded and pro-active. Most association own impressive premises and employ professional staff. They are used to interact with international organisations, donor agencies and have implemented joint projects in the past and a few projects are still operational.

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. These 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 used less since companies installed their own machinery.

All associations were open to interact with TSSP and are looking forward to discuss about concrete steps and activities. The need to have a better and more versatile (“multi-tasking”) trained workforce was mentioned by all interlocutors to increase productivity, quality and flexibility. The linked service and training centres have different experiences in designing and conducting initial and refresher 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.

Recommendations

- Internal discussion and decision at project level of which of the short-listed association and trades shall be included in TSSP.
- Follow-up meetings with the selected associations need to be scheduled to further discuss the mode and level of interaction with TSSP as well as to establish kind and format of interventions at the micro level.
- 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 to provide the expected management guidance to common service and training centres.
- Similarly, the common service and training centres often lack management skills to operate the centre effectively and efficiently and to organise and implement training measures.
- In order to provide adequate skills training, technical and pedagogical training is required in all establishments to cooperate with the association and/or the programme.
- Common service and training facilities of the associations and other training institutions identified for cooperation and service need to be checked and assessed for practicality of machines and equipment for intended training purposes.

Annexes


List of organisations/people consulted

Working schedule and people met, Karachi

2016	Item
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
25.11	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.

26.11.	Travel to Germany: 12:00, Flight EK 615 / EK 045; transfer Airport / Home.
28. Nov. – 15. Dec.	<p>Home Office, Kassel:</p> <p>Finalising documentation and report writing study mission Punjab.</p> <p>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>

List of Notified Apprentice-able Trades / STEVTA

 APPRENTICESHIP TRAINING OFFICE KARACHI GOVERNMENT OF SINDH MANPOWER & TRAINING VOCATIONAL TRAINING WING (STEVTA) LIST OF NOTIFIED APPRENTICE-ABLE TRADES					
S.No.	T.No	TRADE	S.No.	T.No	TRADE
1	46	Armature Winder	84	14	Marine Engineer
2	134	Artist	85	66	Mason
3	98	Assistant Steward	86	132	Mason (Refractory)
4	16	Auto Mechanic (Diesel)	87	146	Material Assistant
5	1	Automobile Body Builder	88	118	Mechanic
6	47	Battery Repairer	89	19	Mechanic (Aircraft Engine & Air Frame)
7	2	Black Smith	90	55	Mechanic (Electrical/Instrument)
8	3	Boat Builder (Steel)	91	116	Mechanic (Hand Composing)
9	60	Boat Builder (Wood)	92	18	Mechanic (Instruments)
10	38	Boiler Attendant.	93	20	Mechanic (Refrigeration & Air Cond.)
11	4	Boiler Maker.	94	150	Mechanic (Technician)
12	64	Bricklayer	95	105	Mechanic (Tractor)
13	91	Burner (Klin)	96	21	Mechanic (Typewriter)
14	61	Cabinet Maker	97	90	Miller (Cement)
15	48	Cable Jointer	98	23	Modeller
16	77	Camera Operator	99	95	Mono Operator (Printing)
17	62	Carpenter & Jointer	100	17	Motor Mechanic (Petrol)
18	102	Chart Reader	101	123	Motor Transformer (Electric)
19	144	Checker (Auto Parts)	102	24	Moulder
20	86	Chemist	103	107	Operator (Drag line)
21	97	Commis/Cook	104	124	Operator (Dyeing & Prining)
22	70	Compositor	105	119	Operator (Milling Machine)
23	79	Copy Paster	106	117	Operator (Mono Keyboard)
24	162	Core Assembler	107	131	Operator (Pharmaceutical)
25	103	Denter	108	127	Operator (Polyester Process)
26	108	Designer	109	139	Operator (Press Machine)
27	138	Die & Tool Maker	110	141	Operator (Refinery)
28	5	Die Sinker	111	115	Operator (Sand blast)
29	15	Diesel Engine Mechanic	112	106	Operator (Tractor/Dozer)
30	65	Draftsman (Civil)	113	114	Operator (Turbine)
31	6	Draftsman (Mechanical)	114	74	Painter
32	159	E & I Technician	115	92	Pan-man.
33	149	Electrical Technican.	116	63	Pattern Maker
34	49	Electrican (Aircraft)	117	152	Planner
35	50	Electrican (Auto)	118	142	Plant Operator (Margarine)
36	51	Electrican (General)	119	68	Plasterer
37	52	Electroplater	120	78	Plate Maker
38	7	Engraver	121	69	Plumber
39	89	Examiner & Book Binder	122	151	Precision Machine Operator
40	145	Fireman	123	143	Press Operator
41	8	Fitter (Bench)	124	96	Pressman (Rubber)
42	128	Fitter (Die)	125	67	Printer & Decorator

No	TRADE	S.No.	T.No	TRADE
53	Fitter (Electrical)	126	135	Printer (Litho/LP)
10	Fitter (Engine)	127	136	Printer (R.C.P)
88	Fitter (Gas)	128	160	Process Operator
129	Fitter (Maintenance)	129	39	Production Supervisor
113	Fitter (Mechanical)	130	93	Quadman
22	Fitter (Millwright)	131	155	Quality Technician
137	Fitter (Motor Cycle Engine)	132	33	Radiator Repairer/Manufacturer
9	Fitter (Pipe)	133	56	Radio Mechanic (Repair & Maint.)
71	Fitter (Printing)	134	34	Refinery Mechanic
133	Fitter (Refractory)	135	35	Refinery Technician
81	Fitter (Textile)	136	31	Shear/press Operator
154	Fitter Maintenance (Electrical)	137	25	Sheet Metal Worker
153	Fitter Maintenance (Mechanical)	138	26	Shipwright
104	Folder	139	163	Solder man
140	Front Office	140	75	Spray Painter/Sprayer
30	General Fitter (Maintenance)	141	27	Steel Construction Worker
85	General Mechanic (Chemical)	142	99	Stewardess
76	Graphic Artist.	143	147	Store Operator
72	Hand Pressman	144	82	Supervisor (Dyeing & Bleaching)
161	HVAC Technician	145	80	Supervisor (Printing & Finishing D.P)
158	Inspection Technician	146	83	Supervisor (Spining)
32	Inspector (Quality Control)	147	84	Supervisor (Weaving)
157	Instrument Technician	148	120	Technician (Electronics)
156	Internal Material Handler	149	43	Technician (Metalware)
11	Jig & Tool Maker	150	41	Technician (Plastic shop)
40	Laboratory Assistant	151	125	Technician (Power plant)
130	Laboratory Technician	152	121	Technician (Pump & glass)
36	Lamp & Glas Technician	153	126	Technician (Ship repair)
100	Laundryman	154	59	Technician (Telephone Installation)
94	Line Operator (Printing)	155	42	Technician (Tool room)
54	Lineman	156	110	Thread Trimming/Packing
12	Locksmith	157	87	Tongsman & Looper
148	Loom Operator	158	28	Turner
44	Machine Operator (Asbestos Cement)	159	58	TV Mechanic
164	Machine Operator (Fin / Tube)	160	111	Waiter
45	Machine Operator (General)	161	115	Weaver
122	Machine Operator (Industrial)	162	29	Welder (Electric & Gas)
109	Machine Operator (Stitching)	163	57	Wireless Operator
73	Machineman	164	37	Wireman
13	Machinist	165	165	Auto Motive Painter
101	Manufacturing Operative (Oil Refinery)	166	166	Computer Operator
		167	167	Sterctrical Assistant

Bibliography; main documents used/reviewed for this study

Source materials consulted and used

Internet study and resource persons

The body of knowledge was formed by extended literature review, internet research and in-person interviews concerning related country and province information, economic sectors, chambers, associations, companies and labour market statistics. Information and figures were used when appropriate but not generally quoted in the document.

Studies and documents

Helpful materials, facts and figures have been provided by the consulted government offices, TVET II, chambers and associations in hard copy or electronic files. The information was used in the report but quotation kept to a minimum for easier reading. Chamber and association internet links are provided in the organisational profiles in Chapter 4.0.

Key studies included:

- Asian Development Bank; Asian Development Outlook 2016. Asia's Potential Growth, Mandaluyong City, Philippines, 2016.
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