



Study on

Producing Skilled Workforce for Potential Economic Sectors

in Baluchistan



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Abbreviations

BF&VGPS	Baluchistan Fruits & Vegetable Growers and Processors Society
BIA	Business & Industry Association
BWBA	Baluchistan Women Business Association
CBT	Competency Based Training
CBT&A	Competency Based Training and Assessment
CNC	Computer Numeric Control
COPHC	China Oversea Port Handling Company
COTHM	College of Tourism & Hotel Management
CPEC	China Pakistan Economic Corridor
CVT	Cooperative Vocational Training
DWT	Dead Weight Ton
FIT	Funds for Innovative Training
FWO	Frontier Works Organisation
GDA	Gwadar Development Authority
GDP	Gross Domestic Products
GEWS	Gwadar Education Welfare Society
GPA	Gwadar Port Authority
IMF	International Monetary Fund
LCCI	Lasbela Chamber of Commerce & Economics
LEUC	Light Engineering Upgradation Center
LHW	Lady Health Worker
LHW-P	Lady Health Worker Program
LIEDA	Lasbela Industrial Estate Development Authority
LNG	Liquified Natural Gas
NAVTTTC	National Vocational & Technical Training Commission
NCSW	National Commission on the Status of Women
NVQF	National Vocational Quality Framework
OECD	Organization for Economic Cooperation & Development
PHA	Pakistan Hotel Association
PIFFA	Pakistan International Freight Forwarders Association
PPP	Purchase Price Parity
RCC	Recognition of Current Competence
RPL	Recognition of Prior Learning
TEU	Twenty Feet Equivalent
TEVTA	Technical Education and Vocational Training Authority
TTC	Technical Training Center
TUSTEC	Technology Upgradation and Skill Development Company
TVET	Technical & Vocational Education & Training
TVET SSP	Technical and Vocational Education and Training Sector Support Programme
WDD	Women Development Department

Executive Summary

The TVET Sector Support Programme started in 2011 by Government of Pakistan with the support of European Union and the Governments of the Netherlands, the Norway, and of the Federal Republic of Germany in Pakistan.

The TVET SSP-phase I was concluded in December 2016 and completed wide-range of work on laying the foundation. This involved: (i) Improving TVET Governance and Institution Building; (ii) National Qualification Framework and Human Resource Development; (iii) Funds for Innovative Training; (iv) Capacity Building for TEVTAs; and (v) Cooperative Vocational Training and Green Skills. The accomplishments were drafting of TVET policy, drafting and approval of 72 CBT-based qualifications, capacity building of TEVTAs and piloting of the concept of Cooperative Vocational Training (CVT). The TVET Sector Support Program (2017-2021) is recently launched with the focus on skill development in collaboration and with participation of private sector, to ensure better employability of the graduates and to meet the market demand by directing towards demand driven trades. This necessitates identification of sectors and subsectors and related BIAs to identify potential partners for the program and requires sector studies. Similar studies were conducted in Punjab and Sindh and this study focuses on Baluchistan.

The sector identification study for Baluchistan was conducted from 9th May till 20th June 2017 to set the base for defining the future priorities for TVET SSP phase II implementation in Baluchistan. This includes identification of the economic sectors and trades foreseeing employment capacities and linked Business and industry associations and training institutes.

The sector screening and selection criterion was based on considering the following:

- The priority areas defined by government for socio-economic development
- The competitive advantage that Baluchistan carries by its location and natural reserves
- Employability potentials: Local and International
- On-going requirements of professions and trades
- Accessibility of information to identify possible skills requirements
- Accessibility of business organisations or trade associations
- Availability of training institutes and CBT&A

This was accomplished using the desk reviews, discussions with people associated with TVET programme, and field visits. The discussions and field visits were conducted with related government entities, chambers, associations, and training institutions, for information gathering and verification.

The study in Baluchistan has been a very challenging one. It is an underdeveloped province with a very low population density and weak infrastructure. This has resulted in a limited

exposure and low understanding level of the stake holders on TVET and skill development. The business associations are either non-existent or are not developed enough in skill development process. In chambers, there is no support on human resource development for member enterprises. There is no or least data available on skill requirements with the stakeholders including trade associations and the training institutes. The security situation in the province is unpredictable.

In formal TVET, there is a high fragmentation in government departments. When it comes to the training institutes there are four allied departments including; industries, education, labour and manpower, and social welfare. This necessitates for any TVET support organisations to coordinate with four different departments. To bring an alignment and a common understanding for all stakeholders, GIZ is creating a Provincial Forum. This will provide a joint platform for steering the TVET project. The training institutes are supply based and lack focus towards demand based trade offering. This leaves the skill development of demand based trades on informal Ustaad-Shagird system. The consequence is non-availability of skilled manpower for demand trades and unemployment for skills developed on supply based trades that come through the formal TVET route.

Based on the study, potential sectors are identified (Annexure 1) for employment and growth. These sectors are very different when compared with other provinces. This is owing to the wealth of untapped natural reserves that Baluchistan carries and lack of infrastructure and human resource development that had restricted the economic growth.

In Baluchistan, there are limited number of representative bodies of the business community. The trade associations (Annexure 2) which have base office in Baluchistan operate at a very basic level and have limited exposure to skill development process. They require building capability to handle skill development. The major task for TVET implementation in Baluchistan would be to improve the capability of the stakeholders. The encouraging part is that these organisations are open for the cooperation to embark journey on CVT. Efforts were made to identify and contact potential partners based in Baluchistan that are linked to the identified economic sectors however in case of non-existence, partners having national presence and membership base in Baluchistan were touched. The following organisations related to above sectors were contacted.

Steps forward

The report focuses on highlighting the sectors that are in-line with the growth plans of the government, having employment potential and sectors where the province has a reasonable advantage. Unfortunately, in Baluchistan it is difficult to identify BIAs and training institutes for all the identified sectors. In areas where there is no BIA (formal or informal), the national BIA addressing the function is considered. The training institutes are supply based and do not offer much of the trades identified above. Similarly, as the trades identified are very different from other provinces many of the NVQF standards are not available. Considering this it is recommended to implement the program in the following way;

- 1) Sectors with employment potential, training providers with capability to start conducting training and approved NVQF qualification. The TVET SSP can address these sectors immediately.

Sectors/Sub Sectors	Trades/Professions	BIA	Training Venues
Manufacturing	Machine Operator, Mechanics, Electricians, Welders,	LCCI	Existing TVET institutes of Labour Department and reputed private sector institutes
Construction	Plumber, Carpenter, Electrician, Pipe Fitter, Welders, Air Conditioning operation and Maintenance	FWO	Existing Technical Training Centres, Vocational Training Centres, Polytechniques, and reputed private sector institutes
Services (Supply Chain) (Male/Female)	Call Center Agent, Logistics & Supply Chain Assistant, Services & Sales Assistant	PIFFA BWBA	Women TTC, Existing TTCs and Polytechnic which are already imparting training in ICT trades, they can easily switch to these trades
Services (Hotel) (Male/Female)	Housekeeping, Cook, Chefs, waiter and waitresses	PHA BWBA	Women TTC, Quetta Government Vocational Institute Quetta, Polytechnic Quetta and some reputed private sector organizations

- 2) Sectors with employment potential where available training providers have capability to start the training but NVQF needs to be developed. These sectors, will require more discussion if the relevant qualifications can be developed by the programme. The Programme can then support training implementation if the development of qualifications is finalized by end of 2018.

Sectors/Sub Sectors	Trades/Professions	BIA	Prospective Training Venues
Services (Supply Chain) (Male/Female)	Customer Service, Logistics, Distribution, Ware-Housing	PIFFA BWBA	TVET institutes of allied TVET Departments, reputed private sector institutes
Services (Hotel) (Male/Female)	Hotel Operations, Hotel Management, Porters, House Keeping	PHA BWBA	Existing TVET institutes through partnership with Serena Hotel, Quetta, PC-Gwadar and Sardar Bahadur Khan Women University
Agriculture-Minor Crops	Pest Management, Green House Farming, Grading, Fruit Processing, Tunnel Farming, Kitchen Farming, Bee Keeping	Baluchistan Fruit and Vegetable Growers and Processors Society BWBA	Agriculture training institutes under Department of Agriculture and reputed private sector institutes already doing this
Industrial (Construction) (Ustaad-Shagird) Informal Sector	Masons, Plasterer, Scaffolder, Glazer & Painter, Carpet layers, Pavers	The CPEC related construction is handled by FWO so coordination with them will be beneficial.	Through RPL/RCC at existing TVET institutes and reputed private sector institute in collaboration with TTB-Quetta
Services (Health Care) (Male/Female)	Lady Health Workers, Dispenser, Operation Theatre Assistant, X-Ray Assistant, Dental Assistant, Nurses, Eye Technician, ECG Operator	As such there is no recognized BIA for Health Care Institutes. However, these are affiliated/regulated by Health Services Academy, Department of Health, Quetta. BWBA	Existing Health Department institutes situated in Quetta and reputed private sector institute

- 3) Sectors with employment potential but training providers and qualifications are not existing. This will need evaluation in 2019 that if the training providers that are in development phase or are in consideration for development have been established and the support for qualification development and training implementation makes rational for the Programme to address.

Sectors/Sub Sectors	Trades/Professions	BIA	Potential Training Venues
Services (Port-handling)	Port Handling, Loaders, Riggers, Drivers, Custom House Brokerage, Dangerous Goods and Packing, Safety & Security Management, Jetty Operators, Port Equipment & Maintenance, Warehousing Operation, Port Administration & Planning, Navigation Aids, Safety Leaders	PIFFA	Proposed Pakistan Chine Technical Vocational Training Centre which is being established
Agriculture (Fisheries)	Catching, Fisherman Safety, Mechanized Fishing, Cleaning, Glazing, Grading, and Sorting, Freezing, Packing, Aquaculture, Cold Storage	Gwadar Education Welfare Society	Proposed Fisheries Training Centre in Sur Bander.
Industrial (Mining)	Quarry Master, Chain Wire Saw, Heavy Machine Operators, Mining Supervisors, Drilling Experts, Blasting Experts, Loading Experts, Gang Saw Operators	All Pakistan Marble Association Baluchistan Chromite Mines Owner Association	Reputed Engineering Universities' and Government Mining departments can start courses.

The study points out the broad range of skills gaps and training needs within the sectors. After establishing partnership with BIAs, it will need a specific training need analysis in collaboration with BIA's.

Introduction

The assignment of the report is to support the TVET SSP by defining the economic sectors in Baluchistan having potential for economic growth and by identifying chambers and associations that can be collaborated to implement the program in their member organisations. The idea is to create a link between the companies through BIAs and relevant training providers for design and delivery of the demand-driven training.

Scope of Assignment

Assignment Objectives:

- Identification of at least four economic sectors/sub-sectors which are presented in a provincial forum for discussion and final selection for successful implementation of the program.
- Identification of qualifications in the selected priority sectors (already existing CBTA qualifications and proposals for the development of new qualifications).
- Identification of subsectors and qualifications suitable for women employment.
- Identification of the required trades and professions.
- Identification of possible skill gaps.
- Identification and assessment of the relevant training institutes in Baluchistan.
- Identification and assessment of the relevant Business & Industry Associations (BIAs) in Baluchistan

Deliverables:

1. Sector analysis report
2. Identification of at least four (4) economic sectors/subsectors with employment potentials
3. Identification of suitable business membership organizations and training establishments in the identified economic sectors
4. Needs analysis for each identified business membership organization
5. Recommending and judging the relevant business organizations and possible training providers

Methodology

The methodology used to identify the sectors having potential for growth in Baluchistan comprised of reviewing the economic out-look of the country using the statistical surveys, international economic researches, development plans envisioned under CPEC project and the sectors within Baluchistan having a comparative advantage due to its location and the available natural resources/reserves. The viewpoint is that, if the growth strategy of a province focuses on the sectors of comparative advantage, and is aligned with the

Country's vision then it is likely to generate steady growth in the province. The BIAs in Baluchistan are underdeveloped and lack exposure on skill development. Yet, the BIAs operating in Baluchistan (formal and informal) were reviewed and their linkages were studied between the identified growth sectors and the private sector organisations. In case where a BIA is not based out of Baluchistan for an identified priority sector then BIAs operating at national level were identified. Identification of BIA's has also been a task as some of them do not even have web sites or direct visibility. The public and private sector organizations and associations having linkage with the identified growth sectors were contacted to authenticate the data and asses their willingness to participate in the program.

Socio Economic Framework

Population

Pakistan is ranked as sixth most populated country in the world. The estimated population is 199.71 million. The country is blessed with majority of its population being in the working age and youth. The demographic advantage may well be captured for the economic growth of the country by directing them towards contributing for economic growth through proper education, skill, and vocational training. This requires planned demand based skill development. The workforce can be a productive asset of the country if properly trained through skill development programs. Focus on technical and vocational education will not only improve individual performance but will also play a key role to increase national productivity.

The population of Baluchistan based on preliminary census done in 2012 is 13.16 million people representing 6.6 percent of Pakistan's total population. It has 53 percent male and 47 percent female population. The population density is 37.9 people per square kilometre (the national average of Pakistan is 250). Apart from the urban centers, such as Quetta and Khuzdar, rest of the population of this province is scattered over a large swath of arid and mountainous terrain. Consequently, Baluchistan's people development indicators and gender disparity are worse than the national average. Female literacy is 25 percent (versus 45 percent for Pakistan).

The last official census data available is of 1998, according to that the population break up was under 15 years of age (46.7%), 15-64 years of age (50.8%) and above 64 (2.5%).

Pakistan Economy

The GDP of Pakistan is USD 988 billion on the basis of PPP and USD 284 billion on nominal basis that ranks it globally as 25th in terms of PPP, and 42nd in terms of nominal GDP. The nominal GDP per capita is USD 1,428, making it 147th in the world. The GDP growth in 2016-17 is recorded at 5.28 percent which is the peak recorded growth in the last 10 years. The capital market had gained to historically high level that is a sign of investor's interest in Pakistan's economy.

The World Bank predicts that by 2018, Pakistan's economic growth will increase to a "robust" 5.4 percent due to larger inflow of foreign investment, mainly from the CPEC

It is generally recognised that Pakistan has huge economic potential. According to a report published by Price Water House Coopers in 2017, Pakistan is projected to become the world's 20th largest economy by 2030 and 16th largest by 2050.

Pakistan's economy is predominantly divided into three main sectors i.e. agriculture, industrial and services.

The country is blessed with multiple climates zones that can lead to the production of superior quality and value-added agriculture based items. Agriculture sector accounts for 19.5 percent of the GDP and employs 42.3 percent of the labour force. It is also a source of raw material for other sectors. During last year the growth in agriculture sector was 3.46 percent.

Industrial sector accounts for 20.88 percent of the total GDP and employs 23.7 percent of the work force. During last year it grew by 5.02 percent. The sector remained stagnant in the past due to poor infrastructure and power deficiencies. However, with government's priority on improving the infrastructure and setting up of power houses, the confidence of investors is reviving for investment in the Industrial Sector.

The Service Sector contributes to 59.59 percent of the total GDP and employs 34 percent people. The growth in services sector was 5.98 percent. Services sector has appeared as the most significant driver of economic growth and is playing a key role in increasing and sustaining economic growth in the country. Performance of services sector is wide based, as all sub-sectors of services are contributing in a positive manner.

Baluchistan Economy

Baluchistan is Pakistan's largest province, and represents 43.6 percent of Pakistan's total land area. Baluchistan despite having a key strategic location and rich natural resource base, contributes only about 8 percent to national GDP. Baluchistan GDP was estimated at USD 8.6 billion. The GDP of Baluchistan constitutes of 29 percent agriculture, 26 percent industrial and 44 percent services. Baluchistan GDP primarily depends upon agriculture, transport, retail and wholesale and manufacturing sectors. These sectors contributed on an average of 77 percent in Baluchistan GDP during the last decade. However, during the same time mining sectors average contribution was only at 5.5 percent. This contribution is insignificant looking at the endowment of minerals that Baluchistan is blessed with.

Economic growth in Baluchistan has remained idle in the past. The province has not seen substantial investment in potential areas (such as manufacturing, minerals, agribusiness, and fisheries) and people development. The peculiar geographical and population density features and security risks in the province create substantial bottlenecks for public service delivery. Consequently, Baluchistan is the least developed province of Pakistan, with weak macroeconomic and social indicators.

There is a limited coordination between the academic and research bodies and industry; as a result the natural resource sector is not linked with the local economy to its potential. Much of the value-added activities are done in other provinces because of better infrastructure and market linkages.

It is estimated that there are around 150,000 enterprises in Baluchistan. Majority of the enterprises are small and informal and are local service providers. It includes confectionaries, restaurants, traders, auto parts vendors, dry fruit merchants, and transporters. Despite the wealth of natural resources, the industrial set-up and processing activities in the province are limited to the Lasbela region. This is because of its closeness to Karachi. Baluchistan is blessed with a natural deep-sea port at Gwadar. It is located near

the Strait of Hormuz, close to the shipping routes from Arabian Gulf to Far East and Europe. It is strategically located deep-sea port. The first phase of the port has been constructed jointly by Government of Pakistan and the Government of the Peoples Republic of China.

It requires the expansion of the private sector by removing hurdles to the growth including better infrastructure, better security conditions, building a skilled human resource, and offering cost and tax benefits for doing business in the province. This will offer a better playing field to benefit all essentials in the private sector.

The strategies that are been envisioned under CPEC, if implemented according to the plan will be a game changer for the economic growth of Baluchistan and the nation. It is the largest Chinese Overseas Investment ever for providing shorter trade route between China and Central Asian States. A total of sixty-two projects have been announced so far under CPEC that includes construction of corridor from Gwadar to Kashgar of 2,700 km length, Over 16,000 MW power plants, double track railway link, Gwadar Airport, development of Gwadar Smart Port City, development of free zones, Gwadar port east bay express way, hospitals, and a vocational training center.

Agriculture

Agriculture is an important economic sector and its development is critical to elevate the economic growth in Baluchistan. In the past, this area has been affected due to water scarcity and out-dated ways of doing the work. There is a strong need to bring about a move from out-dated methods of farming to a modern farming system and processes. Within agriculture, the sub sectors that have potential for growth in Baluchistan includes;

Minor Crops-Baluchistan holds the land and climate to grow almost all kinds of fruits ranging from tropical to sub-tropical and to deciduous fruits. The climate gives a comparative advantage in its production. There is a tremendous opportunity to improve yield and quality and to offer value added products through introduction of modern pre-harvest and post-harvest technologies for local and international market.

The share of Baluchistan in national production of some minor crops is given below:

Product	Share of National Output (%)
Tomato	40
Other Vegetables	16
Apples	81
Apricot	93
Grapes	98

It is important to build the capability of the farmers. The foundation for the capacity building should include: broadening of production from the low value to high value products in response to market demand; improved farm productivity through sustainable use of natural resources and other inputs. This is only possible through augmenting the skills of farmers to diversify farming methodologies.

In Baluchistan, farmers lack knowledge of the existence of the modern farming technologies and the capability of its application. Investing in farmers' capability development will therefore be necessary to streamline Baluchistan's agriculture land scape. This would involve introducing vocational training courses that provide agricultural training. This should include training for tractor operation, use of precision land levelling equipment, operation and maintenance of high-efficiency irrigation systems, repair of agricultural machinery, seed processing methods, and use of information technology.

Fisheries-The Baluchistan coastline makes up 70 percent of Pakistan's coastline and about one-third of the country's fishermen. However, it contributes to only 30 percent of Pakistan's landed catch and only around 15 percent of Pakistan's value-added in fisheries. Due to lack of training and availability of modern facilities it is estimated that 30 percent of marine catch is wasted. With the development of the Gwadar port and coastal highway, the economic strategy should consider creating linkage for supporting development of the fishing sector with the economy. With the development of Gwadar port, the government is planning to shift fishing at Sur Bander. A Fishermen Training Institute is planned and initiated at Sur Bander but is progressing very slowly.

During the last 15 years, Baluchistan's official marine production has been less than 150,000 metric tons annually, about half that of Sindh. The performance of Baluchistan's fisheries appears to fall well short of its potential contribution to the economy of the province and the country.

Pakistan's annual fish exports has touched one time to USD 325 million but it averaged below USD 200 million a year (over last decade) in a market of USD 140 billion, despite the total fisheries import of developed countries has multiplied over the last ten years. Pakistan lags significantly behind other neighbouring countries on fisheries export.

The Pakistan's fishing ground is 200 nautical miles out to sea. However, the last fish stock assessment that was made in 1987 covered only a partial area (only about 50 nautical miles out to sea), which excludes aquaculture. Based on that stock assessment it was estimated that Pakistan could add about USD 400–600 million in exports by just improving the catch and processing efficiency and reducing the wastages. By utilizing the wider area of available fishing boundaries and by promoting aquaculture the annual export potential of the sector could be in the range of USD 1 billion.

Livestock-The consumption of meat, eggs, and milk in the country is on the rise for the past two decades, the most important factors for this increase in consumption are the growth in population, urbanization and increasing income of people.

Livestock in Baluchistan has failed to achieve its potential. The growth in production has not been consistent over the years and has hardly kept pace with the requirements due to population growth. The draught in the province resulted in slow growth rate in animal

population. There are several technical constraints to animal production related with malnutrition, and disease control. Mostly the farmers do not have appropriate knowledge about animal nutrition, disease control and breed selection. This results in low meat output per animal.

Industrial

The Industrial sector in Baluchistan is not much developed which is due to a very low population density, weak infrastructure, and volatile security situation. The major industry is in Lasbela. There are small industries like rice mills, brick kiln industry, flour mills, cooking oil mills and steel re-rolling mills in other parts. In Lasbela there is also an oil refinery and a power house In the Industrial sector, the areas of importance include;

Manufacturing - The major manufacturing is in Hub-Lasbela. The following is the broad categories of Industries at HUB

Agri Auto/Auto	4
Pharmaceuticals	5
Electronic/Electrical	2
Plastic	6
Wire/Cable	3
Cement	4
Packaging	2
Glass	1
Wheel/Engineering	9
Steel/Metal	11
Oil/Chemicals	8
Gypsum	1
Textiles	5
Power	1
Batteries	2
Salt	1
Health care	2
Food	2
Onyx/Marble	1

Most of these companies are medium size. A total of 150 industries are listed with LCCI. The data available with chamber shows a force of 25,000 skilled, semi-skilled, and unskilled workers. A separate set up is established in Gadani which is specific to marble process industry. This industry has huge potential to grow as Baluchistan has the finest reserves of marble. Many new Industrial zones are envisaged under CPEC.

Mining and Minerals-Baluchistan is famous for its mineral resources. Whether it is coal or gold, almost every worthy mineral exists in Baluchistan. The mines in Baluchistan can play big role in contributing to Pakistan's economic prosperity. Minerals which are common in

Baluchistan are coal, chromite, barites, sulphur, marble, iron, and limestone. Marble is the largest commercially exploitable mineral. Onyx, a dark green marble found is of superior quality. A marble city is set-up in Gadani where around 52 industrial units are established. The area falls under Lasbela Chamber of Commerce and Economics and Lasbela Industrial Estate Development Authority.

Construction-The development projects that are being run under the CPEC involves construction of road networks, power houses, development of Gwadar Port City and new industrial zones. Master plan is being developed for construction and development of Gwadar International Airport, 300 MW coal based power plant, fresh water treatment plant, water supply and water distribution facilities, LNG terminal and pipeline and Pak-China Technical and Vocational Institute. This all requires competent construction workers. The current institutions in Baluchistan do not produce satisfactory trained and competent construction manpower. There is a general practice to hire (park) young unskilled persons who are mostly illiterate. This practice results in improper and unprofessional trainings (ustaad-shagird system) and non-compliance to occupational health and safety standards.

Ship Breaking - Gadani Ship Breaking is considered as the biggest ship breaking site throughout the world. Most of the labourers employed there are unskilled and do not have specific training with respect to safety and occupational health. A modern green ship breaking unit is also under consideration for Gwadar.

Service Sector

The Service Sector is strongly linked with other sectors of economy; it delivers important inputs and outputs to other sectors. The recent development that is taking place in terms of the development of the Gwadar port the importance of service sector will grow further.

Port Handling-The development and operation of the Gwadar Port and associated Free Trade Zones are awarded to China Overseas Ports Holding Company Limited (COPHC). In initial phase, the southern area of the free trade zone is being built. It includes a commercial logistic zone, transit, and distribution center and a fish processing unit. Manufacturing area will be developed in the northern area of the zone. Gwadar till now has only been a remote fishing town. Recent exemptions from taxes on investment, development of industrial zone and development of the port are likely to boost the development of service and industrial sector in Gwadar. This will require introduction of modern practises, and right skills to run it effectively.

Hospitality–Hotel industry in Pakistan has started to pick due to rising economic activity. This is particularly related to foreign travellers and local travellers visiting for CPEC. The hotel occupancy rate has gone up to 80percent (on an average) across the country compared to 35 percent previously. In Baluchistan, there are limited number of first class hotels and their occupancy is also improving but is still far below the other parts of the country. With growing momentum on CPEC the demand for hotel accommodation is likely to rise in Baluchistan. The hotel operating in Baluchistan faces problem in meeting their skill requirements.

Women Employment

The constitution of Pakistan provides equal rights to all citizens with no distinction based on the gender. The local labour laws ensure participation of women in all socio-economic sectors of life. As a local custom in Baluchistan, males hold the economic and social power. Customarily, girls' education is not much encouraged due to poverty and cultural issues. Girls, even after enrolment has high possibility of dropouts or withdrawal of education after primary level.

Women Development Cell was established in 1997 in Baluchistan, which was the first step towards women growth in the province. Agriculture Training Women Division is playing an active role to train women in kitchen gardening and bee keeping methods.

The population of females in Baluchistan is 47 percent and literacy rate is 25 percent. Most of the women do not go out of house for work and are care takers for family at home.

There are training centers for women in Baluchistan and their focus of training is mainly on handicrafts, tailoring, leather, embroidery, baking and beautician courses. The trained women mostly work from home in free time and do work on per piece basis on contract for entrepreneurs.

The awareness and need for women to get skill and work is increasing. There is now a dedicated Sardar Bahadur Khan University for women offering degrees in multi-disciplines. In 2014, a Baluchistan Women Business Association has been formed and it is emerging with the growing number of membership.

Apart from traditional trades there are opportunities for women in the following trades:

Supply Chain-With the development of the Supply Chain sector having linkage to Gwadar Port development there will be areas like Distribution Operation, Distribution Planning, International Freight Operation, Software Operation for Port Handling, Software Operation for Warehousing, and Distribution where women can play a key role.

Hotel-The expansion of hotel industry will require additional staff and there will be openings like Cookery, Front Office/Guest Services, Customer Services, Sales, Housekeeping, Waitresses and telephone operators suitable for women.

Health Care-Lady health worker program is the back bone of preventive side of the health department. They provide promotive, preventive, curative and rehabilitative services at the door step of the community and it is forming the bridge among the health care provider and community. In Pakistan, the Lady Health Workers Program (LHWP) was launched in 1994 to bring health services closer to the communities. Currently it covers 60 percent of Pakistan's rural population and only 28 percent of Baluchistan. The Lady Health Worker Program includes training and placement of the graduates. In addition, there are opportunities in trades like Dispenser, Operation Theatre Assistant, X-Ray Assistant, Dental Assistant, Nurses, Eye Technician, and ECG Operator. This needs to be evaluated further through Ministry of Health.

Agriculture-The Agriculture department has started training in kitchen gardening and bee keeping that can be further explored through the Women division of the Agriculture Department.

Ustaad–Shagird System

Traditional this system remained an important source and backbone of the skill development in the informal sector. It is a system where youth including school leavers, with low family income, or having low-level of qualifications are trained under the supervision of a mechanic or owner of the industry. A large proportion of labour force is employed informally in unregulated sectors. The trades trained on USTAAD-SHAGIRD practice includes; car mechanics, car denting and painting, car puncture work, bus driving, truck driving, tractor driving, motor cycle repair, welding, aluminium work, electrician, plumber, fitter, machine operators, bakers, mason work, and tailoring.

TVET Framework

Traditionally Pakistan's technical and vocational education and training (TVET) system had many challenges in terms of access, quality, equity, and relevance. The system was supply based and as a result 2.4 million young people entering the job market annually were not a complete match with the demand. The quality and relevance of the training delivered was not demand driven. There was an inadequate cooperation between the public and private sector for TVET governance and delivery. To improve the TVET mechanism, the Government of Pakistan embarked its journey on TVET sector in 2011 with the support of the European Union and the governments of the Germany, Netherlands, and Norway. The first segment of the transformation, which was based on the National Skills Strategy (NSS), has concluded in December 2016. During this period, many milestones have been accomplished. This includes national TVET policy, National Vocational Qualifications Framework (NVQF) and Competency Based Training & Assessment (CBT&A). The next phase of the TVET Sector Support Program has started from January 2017 for five years.

TVET Sector Support Program is being implemented through the following focus areas;

Policy & Governance

- Implementation of the national TVET policy at federal and provincial level
- Agreements of cooperation between public and private sector
- Quality assurance & management
- Accreditation of TVET institutes

Private Sector Engagement

- Increasing private sector's participation in TVET related decision-making bodies at federal and provincial/regional levels

Establishment of Sector Skills Councils

- Strengthening of employer-led Institute Management Committees

- Promoting systematic dialogue between public and private sector

Implementation of sectorised TVET

- Provision of competency based training (demand-oriented vocational training) to youth in Sindh and Baluchistan through a special training fund.
- Promotion of on-the-job or work based vocational training
- Facilitation of agreements between training providers and enterprises for training delivery

Human Resource Development/ Teacher Training

- Implementation of NVQF
- Development and implementation of new demand-driven national qualifications through CBT & A
- Setting up Centres of Competence for teachers' training
- Training of teachers, assessors, and principals of public and private TVET institutes

Identification of Sectors

Baluchistan is naturally bestowed with a big coastline and natural assets of minerals. It has multiple climate zones to produce a variety of superior quality fruits. The nucleus of CPEC project lies in the development and operation of Gwadar port. This is a key strategic project for China and Pakistan. To support port development work on infrastructure development, construction of power houses and development of multiple Industrial parks is taking place. Most of the population in the province is involved in entrepreneurship, agriculture, services, and informal industries. After reviewing all the dimensions, the sub sectors requiring focus for skill development are;

Services Sector–Port Handling/Logistics/Customer Services/Warehousing The development of Gwadar port as a part of CPEC Strategy is the top most priority for Pakistan and China. This route will be used to connect China with the West. If Pakistan caters to only 10 percent of China’s total trade, 5.1 TEU million containers would pass through Gwadar that means USD 400 billion worth of goods.

- 1) Industrial Sector–Construction-CPEC development focuses on infrastructure projects, power projects and transportation projects. A total of 62 projects are already identified that includes construction/up-gradation of 2,700 km Corridor from Gwadar to Kashgar, 16,000 MW of power houses, master plan for Gwadar port city and related development projects including industrial zones, vocational training centers, airport, hospitals, and hotels. This calls for a huge construction activity.
- 2) Industrial–Manufacturing-Mining–Marble-The manufacturing set up is in Hub–Lasbela. There is always a need to provide skilled workers to meet the manufacturing labour requirement for the factories. Finding a skilled worker has always been an issue over there. To address this, LCCI is in a process to set up a training centre in Hub.

The superior quality onyx deposits occur at several localities. Baluchistan is very rich in mineral (both precious and dimensional stones) resources that are still to be tapped. According to the Geological Survey of Pakistan, Baluchistan has estimated reserves of 2.5 billion tons of dimensional stones which at a moderate price per ton are worth USD 60 billion. The estimated reserves of marble in the province are more than 12 million tons. The traditional blasting method of mining results in 70 percent wastage at mining end. Marble City has been established in the year 2004 for marble processing. There are around 52 units that have commenced production in the area. The Industrial sector can focus on developing skill force for mining, marble processing and professions/trades to support the manufacturing industry.

- 3) Services–Hotel-Occupancy growth for hotels in Pakistan is primarily generated by business related clientele. Hotels in Pakistan are witnessing growth, both in terms of occupancy and average rate. This trend is expected to continue due to enhanced travelling for CPEC related activities. During 2015, an average occupancy rate across the industry was around 35 percent that went up to 80 percent by August 2016. It is

projected that the jobs being created in the hospitality sector will have an increase of 2.1 percent per annum over the next ten years. Online booking portal have seen an extraordinary increase in the bookings. Previously in 2014, it was 5-6 guests a month but now number is gone up to 50.

- 4) Agriculture–Fisheries-The Baluchistan coastline makes up to 70 percent of Pakistan’s coastline and about one-third of the country’s fishermen are from Baluchistan. However, the contribution to total country’s marine catch is only 30 percent. Around 30 percent of marine catch is wasted owing to the lack of knowledge and use of modern and proper methods. Pakistan's annual fish exports have touched after a long time to USD 325 million in a market of USD 140 billion, which can easily increase by three times. A mega fish processing unit is under consideration for set up in Baluchistan.
- 5) Agriculture–Minor Crop-Baluchistan holds the land and climate to grow almost all kinds of fruits ranging from tropical to sub-tropical and to deciduous fruits. The climate gives a comparative advantage in its production. It contributes Apple (81%), Apricot (93%) and Grapes (98%) of the national output. Due to conventional methods of farming the wastages are high and the value-added products are not manufactured.

Considering the infrastructure of Baluchistan with respect to the availability of training providers, maturity and availability of BIAs and availability of CBT&A it will not be possible to initiate work on all the identified sectors and sub sectors. It will require a prioritisation for implementation. After careful consideration and discussion with the stakeholders the practical approach for execution would be.

- 1) The sectors that program can support immediately.

These are the sectors with employment potential, having training providers with proficiency to start training and with approved NVQF qualification. This includes;

- (Industrial–Manufacturing) Machine Operator, Mechanics, Electricians, and Welders.
- (Industrial–Construction) Plumber, Carpenter, Electrician, Pipe Fitter, Welders, and Air Conditioning Operations, and Maintenance
- (Services-Supply Chain) Call Centre Agent, Logistics & Supply Chain Assistant, and Services & Sales Assistant.
- (Services-Hotel) Housekeeping Waiter, Waitresses Cooks, and Chefs

- 2) The sectors that programme can support training implementation provided their qualifications are finalized by end of 2018.

These are the sectors with employment potential where available training providers have capability to start the training but NVQF needs to be developed. These sectors will require more discussion to assess viability if the relevant qualifications can be developed by the programme. This includes:

- (Services-Supply Chain) Customer Service, Logistics, Distribution, and Ware-Housing.
- (Services-Hotel) Hotel Operations, Hotel Management, and Porters.
- (Agriculture-Minor Crops) Pest Management, Green House Farming, Grading, Fruit Processing, Tunnel Farming, Kitchen Farming, and Bee Keeping.
- (Industrial-Construction) Masons, Plasterer, Scaffolder, Glazer & Painter, carpet layer and Pavers.

- (Services-Health Care) Lady Health Workers, Dispenser, Operation Theatre Assistant, X-Ray Assistant, Dental Assistant, Nurses, Eye Technician, and ECG Operator.

3) The sectors that program to re-evaluate in 2019 for development of NVQF standards by assessing if the training providers that are in development phase have become functional.

These are the sectors with employment potential but training providers and qualifications does not exist. This will need evaluation for availability of training providers and if the support for qualification development and training implementation makes logical at that point of time. This includes;

- (Services-Port-handling) Loaders, Riggers, Drivers, Custom House Brokerage, Dangerous Goods and Packing, Safety & Security Management, Jetty Operators, Port Equipment & Maintenance, Warehousing Operation, Port Administration & Planning, Navigation Aids, and Safety Leaders
- (Agriculture-Fisheries) Catching, Fisherman Safety, Mechanized Fishing, Cleaning, Glazing, Grading, and Sorting, Freezing, Packing, Aquaculture, and Cold Storage.
- (Industrial-Mining) Quarry Master, Chain Wire Saw, Heavy Machine Operators, Mining Supervisors, Drilling Experts, Blasting Experts, Loading Experts, and Gang Saw Operators.

Services – Port Handling – Customer Services – Logistics – Transportation – Warehousing

Geographical Area	Cluster Location	Sector/Subsector	Rational	Trades/Professions	Employment potentials	Business Membership Organisation(s)	Training establishments
Gwadar - Quetta		Services:	<p>Gwadar has been envisaged as a future Hub for transportation of goods and oil for China. If it caters for only 10 % of goods for China then it will be handling 5.1 million containers per year.</p> <p>This will provide many direct and indirect employment opportunities.</p> <p>Sector will also require a higher educated staff at professional and middle management position.</p>	<p>Trades/skills required by the sector include:</p> <p>Loaders/Riggers</p> <p>Drivers</p> <p>Green logistics</p> <p>Custom house brokerage</p> <p>Dangerous goods packing and handling</p> <p>Safety and security management</p> <p>Service & Sales agents</p>	<p>The subsector will require 600 person at the professional and middle management level over the next three years.</p> <p>According to study by OECD on 145 ports, 1 mn tons of transshipment generates approximately 300 jobs</p>	<p>Pakistan International Freight Forwarders Association (PIFFA) Karachi</p> <p>Gwadar Port Authority</p> <p>BWBA can be used to initiate and encourage female participation</p>	<p>Women TTC, Existing TTCs and Polytechnic which are already imparting training in ICT trades, they can easily switch to these trades</p> <p>PIFFA Training Institute Karachi.</p> <p>Institute is being managed by the association itself. Providing diploma level training in logistics and supply chain management.</p> <p>GPA and PIFFA can assist in developing courses on CBT&A</p> <p>A new VTC Pakistan China Vocational Training Centre in Gwadar is being set up as a part of CPEC and will have trades related to Port and Supply Chain.</p> <p>To head start GPA is offering land to interested organisations</p>
				Port Handling			
				Customer Service			
				Logistics			
				Transportation			
				Ware-housing			

	Port Administration and Planning Navigation Aids Logistics & SC Assistant Call Centre Agents	to start a VTC till the new center is developed. They are in advanced phase to allocate some of the space for starting SAP training.
Key potentials/strengths:	Association (PIFFA) has its own training institute that is catering to the HR requirements of the sector so they know their field of specialization. Complete infrastructure development and designing is being done with a master plan to build international standard port city. A Vocational Training Centre worth USD 10 million is planned at Gwadar. New freight forwarding / supply chain companies / ware-houses will emerge and more jobs will be created with the development of new port.	
Key weaknesses / risks:	Security Risks Currently no Institute is offering the related trades in Baluchistan, but some courses having NVQF can start immediately as the institutes are offering similar programs. There is no BIA found of Supply Chain that is based in Baluchistan.	
Other remarks:	PIFFA can be convinced to support development of trades in Baluchistan as it is a national organisation.	
CBTA Qualifications available	NVQF 2: Computer Operator; Office Assistant, Customer Service & Sales Assistant; HVAC NVQF 3: Call Centre Agent; Logistics & Supply Chain Assistant; NVQF 4: E-commerce	
CBTA Requires	Loader, Rigger, Drivers, Safety & Security, Port Equipment Maintenance, Jetty Operations, International Freight Operations, Port Administration & Planning, Navigation Aids	

Industrial – Construction

Geographical Area						
Cluster Location	Sector/Subsector	Rational	Trades/ Professions	Employment potentials	Business Membership Organisation(s)	Training establishments
Gwadar – Quetta & Gwadar – Kashgar route	Industrial: Construction	Development is foreseen in the country for the development of infrastructure including road networks, construction of power houses, construction of airport and development of Gwadar port under CPEC.	Trades/skills required by the sector include:	The subsector will require about 2000 skilled people in different disciplines	FWO GDA GPA	Existing Technical Training Centres, Vocational Training Centres, Poly-techniques, and reputed private sector institutes like
		This will create job opportunities for construction workers. Currently there is a shortage of construction workers in Baluchistan and the construction activities are managed through workers from other provinces.	Masons Plasterer Plumber Carpenter Electrician Scaffolder Glazer and painter Pavers Carpet layer Pipe fitter Welders			TTC Quetta TTC Gwadar TTC Hub

Key potentials/strengths:	<p>Projects are already identified.</p> <p>Work on some projects is already initiated and others are in bidding and designing stage.</p> <p>It has potential for overseas employment.</p>
Key weaknesses / risks:	<p>Trades need to be introduced in training institutes in Baluchistan.</p> <p>Could not find a Business Membership Organisation in Baluchistan. Coordination with FWO (dealing with CPEC construction projects),</p> <p>GDA and GPA will be required.</p>
Other remarks:	<p>Institutes operating in other provinces can be utilized for speedy development of construction workers.</p>
CBTA Qualifications available	<p>NVQF 1: Electrician, Plumber</p> <p>NVQF 2: Electrician, Mason, Plumber, Welder</p> <p>NVQF 3: Electrician, Plumber,</p>
CBTA Required	<p>Scaffolders, General Construction (Civil)</p>

Industrial –Manufacturing – Mining

Geographical Area			Trades/ Professions	Employment potentials	Business Membership Organisation(s)	Training establishments	
Cluster Location	Sector/Subsector	Rational					
Lasbela	Industrial: Manufacturing Mining	Artisan and professional trades are frequently required to help and support the growth and expansion for industrial units in Lasbela.	Trades/skills required by the sector include:			Existing TVET institutes of Labour Department and reputed private sector institutes including TTC Hub and LECU can easily be used and their capacity can be developed. Government Mining department can collaboration with Reputable Engineering Universities, Stone Development Company and Pakistan Marble Processing Association for Mining and Marble processing courses	
		The mines in Baluchistan can play a big role in contributing to Pakistan's economic prosperity. Marble is the largest commercially exploitable mineral and its deposits are found in abundance.	Machine Operators Mechanics Electricians Welders Quarry Master Chain Wire Saw Operator Mining Supervisor Drilling Expert Blasting Expert Loading Expert				Lasbela Chamber of Commerce and Industry. Pakistan Marble Processing Association
		A dedicated marble processing estate is developed in Lasbela.	Tile Polisher Gang Saw Operator Tile Cutting Operator Safety leads	The subsector will require about 1400 workers in next 3 years.	Lasbela Industrial Estate Development Authority		

Key potentials/strengths:	Superior quality marble is available as raw material. Marble city is established in Gadani where industrial units are established to process marble. There is a complete set up from Mining to Market. 52 units are operating in Marble City and 150 Industries are registered with LCCI. The area is the heart of manufacturing in Baluchistan.
Key weaknesses / risks:	None of the technical training institutes in Baluchistan caters specific training in Mining.
Other remarks:	This can be utilized to support the mining, marble and manufacturing set-up in Lasbela
CBTA Qualifications available	NVQF 1: Electrical Machine Technician NVQF 2: Electrical Machine Technician, Welding, Machinist, Mechanic
CBTA Required	General Mining Technicians, Safety Leaders, Marble Processing.

Services – Hotel

Geographical Area				Employment potentials	Business Membership Organisation(s)	Training establishments
Cluster	Location	Sector/Subsector	Rational	Trades/Professions		
Gwadar – Quetta – Along the Kashgar Gwadar corridor		Services: Hotel Industry	<p>Pakistan's hospitality industry is booming due to growing economic activities particularly after the CPEC.</p> <p>The rate of hotel occupancy has gone up to 80% across the country compared to 35% in previous years. The sector has greater possibilities of female employment</p>	<p>Trades/skills required by the sector include:</p> <p>Hotel Operations Hospitality and Tourism Management Professional Cooking Food & Beverage Production and Service Front Office/Guest Services Customer Services Sales Housekeeping Porters Concierge Waiter/Waitresses Air-conditioning operation and maintenance</p>	<p>Pakistan Hotel Association (PHA) Karachi</p> <p>Pakistan Tourism Development Corporation</p> <p>Involve BWBA for Women involvement in the profession.</p> <p>The subsector will require about 1500 persons in next 3 years.</p>	<p>Women TTC, Quetta Government Vocational Institute Quetta, Polytechnic Quetta, and some reputed private sector organizations</p> <p>Pakistan Institute of Tourism and Hotel Management, Karachi, College of Tourism & Hotel Management (COTHM) Karachi and Pakistan Hotel Association be used to develop required qualifications and to support introduction of these trades in Baluchistan.</p>
Key potentials/strengths:	The movement of expatriates and local travel for CPEC is having positive impact on Hotel Industry. Once the CPEC route is operational there will be demand of hotels along the route.					
Key weaknesses / risks:	<p>There is no BIA or training institute in Baluchistan to support this area. It will require support at National level BIAs.</p> <p>Business travel in Pakistan plays a key growth driver for the hotel industry that also depends on the law and order situation.</p> <p>The growth in hotel industry is closely linked to growth in GDP and business-related activity, any adverse movement in the same could also hurt industry profitability and revenue indicators.</p>					
Other remarks:	construction / up-gradation of 2700 km Corridor from Gwadar to Kashgar will require hotels motels and cafes along the road.					

CBTA
Qualifications
available

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
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

CBTA Required

House Keeping, Hotel Operations, Hospitality, and Tour management.

Agriculture – Fisheries

Geographical Area				Employment potentials	Business Membership Organisation(s)	Training establishments
Cluster	Location	Sector/Subsector	Rational	Trades/Professions		
Lasbela – Gwadar – Sur Bander		Agriculture:	Global Fisheries market is USD 140 billion. Global annual per capita consumption of fish has been increasing at around 1 percent per year. The contribution of Pakistan was only USD 325 Million in 2106.	Trades/skills required by the sector include: Catching Fishermen Safety Mechanized Fishing Cleaning Glazing Grading and Sorting	Gwadar Education Welfare Society Gwadar Moid (Fishermen) Ittehad (Union)	Potential Establishments Fisheries Training Institute Sur Bander (in construction phase).
		Fisheries	The exports from Pakistan can easily increase three times.	Freezing Packing Aquaculture Refrigeration and Air Conditioning		
Key potentials/strengths:	There is a coast line of 750 KM. Population in the vicinity is in fishing profession A training Institute for Fisheries is planned in Sur Bander Mega Fish Processing Industry is planned in collaboration with China.					
Key weaknesses / risks:	Currently there is no formal training offered in this area.					
Other remarks:	This area needs to be studied in detail as it has a huge potential for economic growth. Due to untrained Fisher-men there is a huge wastage and species are depleting.					
CBTA Qualifications available	NVQF 2: HVAC					
CBTA Required	Fish Catching and Processing, Food Safety & Quality					

Agriculture – Minor Crops

Geographical Area	Cluster Location	Sector/Subsector	Rational	Trades/ Professions	Employment potentials	Business Membership Organisation(s)	Training establishments
	Quetta – Ziarat – Mustang- Kalat- Pishin	Agriculture: Minor Crop	Baluchistan is gifted with the land and climate to grow variety of fruits. A large number of people are involved in growing fruits and vegetable. However due to lack of training and use of old methods the yield is low. Agriculture contributes to 29 % in GDP	Trades/skills required by the sector include: Pest Management Green House Farming Grading Cleaning & packing Fruit Processing Judicious use of water Advance Farming Tunnel Farming Kitchen Farming Bee Keeping	Employment potential needs to be assessed as no data is available.	Baluchistan Fruits & Vegetables Growers & Progressive Society Baluchistan Horticulture Cooperative Society Agriculture Training Women Division	Potential Establishments are: Baluchistan Agriculture College. Quetta. Agriculture Research Institute Quetta. Agriculture Department- Women Division, Quetta.
Key potentials/strengths:	Baluchistan has largest contribution of apple, apricot, grapes, and tomato in national production There are multiple climate zones to produce good quality fruits Mobile Courses are already being offered.						
Key weaknesses / risks:	Water availability is a problem in the province. There is no structured training of farmers. Farmers are using conventional ways of farming resulting in huge wastage.						
Other remarks:	It requires detailed study on delivery of the program as the farmers are scattered in the province.						
CBTA Qualifications available	NVQF 2: Citrus Production and Processing NVQF 4: Farm Supervisor						
CBTA Required	Modern Farming Techniques						

Sectors for Women

Geographical Area							
Cluster	Location	Sector/Subsector	Rational	Trades/ Professions	Employment potentials	Business Membership Organisation(s)	Training establishments
				Trades/skills required by the sector include: Distribution Operation Distribution Planning International Freight Operation Computer Operation Cookery, Front Office Customer Services Sales Housekeeping Waitresses Telephone operators Kitchen Farming Bee Keeping Lady health workers Health Care Technicians Carpet / Handcrafts			
		Sectors for Women: Supply Chain Hotel Health Care Agriculture Handicrafts	Baluchistan has 47 % population of women. It is important that they participate in the economic development.		On a conservative side, the requirement would be 500 to 1000 women.	PIFFA Baluchistan Women Business Association Agriculture Department- Women Division Baluchistan Ministry of Health	Women TTC Quetta TTC Gwadar Sardar Bhadur Khan Women University (Demand Driven Courses will need to be introduced in selected TTC.s) Existing Health Department institutes situated in Quetta and reputed private sector institute
	Quetta–Gwadar - Lasbela						
		Key potentials/strengths:	Baluchistan has 47% female population. Women Development Cell has been established by the government. Agriculture Training- Women Division is playing an active role to train women in Kitchen Gardening and bee keeping.				

	The awareness and need for women to get skill and work is increasing. BWBA is very progressive.
Key weaknesses /risks:	Main focus of working women is on handicrafts and on part time basis. Training Institutes do not offer modern trades.
Other remarks:	There is a huge potential in Lady Health Worker Program and requires more study. This could not be covered in depth due to limited time to establish contacts with relevant people.
CBTA Qualifications available	NVQF 2: Computer Operator; Office Assistant, Customer Service & Sales Assistant; Hospitality Cook, Waiter NVQF 3: Call Centre Agent; Logistics & Supply Chain Assistant; NVQF 4: E-commerce
CBTA Required	International Freight Operations, Housekeeping, Modern Farming, Lady Health Worker, Health Care Technicians - Dispenser, Operation Theatre Assistant, X-Ray Assistant, Dental Assistant, Nurses, Eye Technician, ECG Operator, Carpet, and Handicraft

Profile of Business Organizations

Based in Baluchistan are limited number of trade and business organizations and there are areas where a BIA linked to an identified sector is not based there. In such cases the BIA's operating at national level are considered. It is healthier to emphasis on demand driven trade by improving the system and introducing the trades that has potential for employability and economic growth.

PIFFA¹

Item	Details	
Name	Pakistan International Freight Forwarders Association (PIFFA)	
Address / Headquarter	257-C, Block-6, P.E.C.H.S. Karachi-75400, Pakistan Tel: + 92 21 343 22671-3 Fax: + 92 21 343 22670 Email: piffa@piffapk.com URL: www.piffapk.com	
Key contact / focal person(s)	Mr. Muhammad Ilyas Chairman PIFFA Tel: + 92 21 343 22671-3 Fax: + 92 21 343 22670 Email: piffa@piffapk.com	Mr. Habibullah A. Latif Secretary General Tel: + 92 21 343 22671-3 Fax: + 92 21 343 22670 Email: piffa@piffapk.com
Organisational form	Non-profit organisation Autonomous Institution of Public Interest, "Trade Body".	
Legal status	Registered with the Directorate General of Trade Organisations, Ministry of Commerce as a trade association	
Members	PIFFA has more than 500 Freight Forwarding Companies as Members.	
Brief history, founding year, etc.	PIFFA was established in 2005 and became the sole representative body of Pakistan Freight Forwarders. PIFFA is representing more than 500 companies providing Land, Air, Ocean Combined Transport, and other Logistics services.	
Purpose	PIFFA aims to provide effective representation and support for Pakistan freight services industry to observe the highest standards of professional competence.	

¹ Organization profile of PIFFA

	<p>The Association aims to achieve standardization in the industry and to promote a high degree of professional conduct among its members, including ethics and financial viability.</p> <p>The role of the association includes support for the Pakistan trade worldwide, the development and the maintenance of healthy international freight services industry within Pakistan.</p> <p>PIFFA is realizing importance of CPEC and is introducing diploma in other functions within Supply Chain</p>
PIFFA - FIATA Diploma in Freight Forwarding	<p>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.</p>
Other Remarks	<p>Association is successfully running trainings at its own institute in Lahore and Karachi</p>

Findings

PIFFA intends to provide representation and support on national level for Pakistan's freight services and logistics industry to implement international standards. It has 563 members. PIFFA has started its own training centre in Karachi and Lahore. The course provides basic knowledge of all functions of international freight forwarding. Realizing the importance of CPEC requirements they plan to start a diploma course in Supply Chain Management shortly. PIFFA plans to start discussion with its members to set-up a mechanism for monitoring work-force demand and initiating demand based training program through a centralized PIFFA desk. They have membership across Pakistan including Baluchistan and this is the only relevant organisation at this point that is related to Supply Chain.

Conclusions, Recommendations, Road Map

Economic growth of the country is strongly linked to the efficiency of the supply chain. It will become significant with the completion of the CPEC Project. This is the right time to align and develop the skills. 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 has started to operate their own training centres in Karachi and Lahore. The fact is that supply chain will have to play a major role once CPEC is operational and currently this is the only available association to support. They can be utilized to initiate these courses in Baluchistan.

Next steps:

- Conduct a meeting and discuss the viability of developing the NVQF standards for trades that can be initiated by end of 2018.
- Discuss their involvement as SME to support in designing and assisting in introducing new trades related on Supply Chain and to support in the capacity development of institutes in Baluchistan on Supply Chain.
- They can be a national partner on Supply Chain for TVET.
- Agree on the level of their involvement and assist in developing their capacity to work as a potential partner.

LCCI²

Item	Details
Name	Lasbela Chamber of commerce and Industry
Address / Headquarter	LCCI Office Building, DC-26, HITE, Hub District Lasbela Phone: +(92-0853) 363261-3 Fax: +(92-0853) 363264 E-mail : info@lasbelachamber.com lasbelachamber@gmail.com Website: www.lasbelachamber.com
Key contact / focal person(s)	Mr. Ismail Suttar – President Mr. Abdul Rasheed- Secretary General
Organisational form	Lasbela District in the province of Baluchistan, its importance is also due to its proximity of Karachi, the hub of economic activities of the country and the development of Gwadar port. It has emerged as the industrially and commercially most active region of Baluchistan having great potential for industrial and commercial investment. There are five Industrial Estates under LCCI including a Marble City and a large Ship Breaking Yard.
Legal status	It was formed in 1995 after being licensed by the Ministry of Commerce, Government of Pakistan, and being registered with the Securities Exchange Commission of Pakistan.
Members	There are 150 industrial units having an estimated investment of about Rs. 150.00 billion, producing Electric Power, Cement, Textile Yarn and Fabrics, Glucose, Sugar Confectionary, Food Products, Pharmaceutical Products, Petrochemicals, Chemicals, Ceramics, Engineering Goods, Marble, and Granite Products, etc.
Purpose	Vision: "To see the Lasbela District most prosperous and economically sound enabling the region to cater to the requirements of upcoming Gwadar and Sonmiani ports in Baluchistan." Objectives: " To try to create conducive environment to attract industrial investment in Lasbela District in view of almost saturation in Karachi and its surroundings, by way of pursuing LIEDA, NHA, PASDEC, Pakistan Railway and District Governments to develop necessary infrastructure in the region To tap the mineral resources of Baluchistan and to take maximum advantage of these resources by creating awareness regarding the modern mining and processing technology and by employing modern marketing techniques To suggest to and pursue the Government to establish Sea Food City at Dham, Lasbela creating opportunities for investment in this sector to tap the sea food resources of the coastal line of Baluchistan To suggest the building of small dams and reservoirs to store flood water to raise the level of underground water resources to facilitate the agricultural growth in the region, which is already producing fruit

² Organizational Profile of LCCI

	<p>vegetable, wheat, cotton etc. This will also facilitate the growth in the poultry and livestock sector</p> <p>To facilitate the members in solving their day to day problems regarding the interpretation of laws and procedures, provision of infra-structure facilities, by playing a role of bridge between Government and the private sector</p> <p>To endeavor to bring the more and more business enterprises into the membership folds of the Chamber based on Chamber's performance. To accomplish the above objectives, the Chamber has been actively engaged and will perform the following activities: -"</p>
Management	<p>The Chamber's policies and programs are determined by a 12-member Executive Committee, which is constituted every year. Out of total members of Executive Committee, one half retires every year and in their place, new members are inducted through elections. The Managing Committee every year elects the President and Vice President of the Chamber. President controls the working of the Chamber with the assistance of Vice President.</p>
Staff	<p>The Chamber's workings are carried out through the consultations with the Sub-Committee formed every year by the Executive Committee, to deal with various subjects and issues like trade and industry problems, customs and sales tax problems, labor problems, etc.</p>
Services	<p>The chamber's basic function is to protect and promote the interest of trade, commerce, and industry in Lasbela District. It strives hard to espouse the cause of private sector enterprises and to redouble its contribution in the socio-economic development in the country. It also works on the capacity building of the members and their staff by way of organizing the seminars and workshops on the issues pertaining to taxation, environment, labor laws, management and marketing, processing etc.</p>

Findings

Lasbela Chamber of Commerce and Industry is the most important Chamber of the province of Baluchistan having majority of the manufacturing industry. In Baluchistan, this chamber has the maximum number of industries as its members. LCCI will have an important role to play in the industrial development of the Baluchistan and could be the best partner for the implementation of TVET. The executive committee and the members are concerned for the skill development of the youth in that area and to handle the situation, they have taken an institute through TUSTEC in Hub with modern machinery installed. The institute is called Light Engineering Upgradation Centre (LEUC). This will be used to train the youth on demand driven skills for the member organisations and will be an opportunity to upgrade the skill level of the regional community.

Conclusions, Recommendation, Road Map

Lasbela Chamber can be used for implementing the TVET Sector Support Program in Baluchistan in industrial sector as a quick-win and then it can be replicated in other parts. They represent good number of industries and sectors. This is an opportunity for TVET to create foot print in Baluchistan. The president and the Secretary General are concerned for the skill development of the people in the region and to provide the skilled work force for the member

organisation. The initiative that they have taken to use LECU for this purpose indicates their seriousness in participation of skill development of the population residing in Lasbela. This is an opportunity to be used for implementing CVT model in this institute through capacity building of the Chamber and the Institute.

Next Steps

- A dialogue needs to start to bring clarity on the roles and responsibility for the implementation of the program. Arrange a meeting with the Executive Committee to discuss and agree on terms of reference, roles, and responsibilities for entering into a potential partnership.
- Mutually agree and position one person from TVET at Chamber Office to build the capacity of the chamber.

PHA³

Item	Details
Name	Pakistan Hotel Association (PHA)
Address / Headquarter	Suite # 01, Ground Floor, Shafi Court Merewether Road, Civil Lines Karachi-75530, Pakistan. Phone: (92-21) 3568 6407 Fax: (92-21) 3568 8852 Email: info@pha.org.pk
Key contact / focal person(s)	Mr. Mustansir Zakir, Chairman Mr. Zubair Surti, Senior Vice Chairman Ms. Fauzia Azhar – Secretary General
Organisational form	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. It has around 150 members.
Legal status	PHA was first registered under Section 3 of the Trade Organizations Ordinance, 1961 and the license was granted by the Ministry of Commerce. Under the Trade Association Act 2013, PHA was registered at 2. August 2013. Accredited by the Ministry of Tourism, this body is the only representative body of the hotel industry in Pakistan.
Brief history, founding year, etc.	Pakistan Hotels Association was established in 1963. All the leading hotels in Pakistan from One to Five Star are members of the Association.
Purpose	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.
Financing	Membership Fee, donations from member companies, promotions & projects.
Services	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 Help in expansion and development of existing projects 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

³ Organizational profile of PHA

Findings

The hotel industry is one of the possible growth sectors in the country owing to the economic activities taking place on CPEC. This is evident that the occupancy of hotels has improved and that the on-line booking through portals is growing. One can see the inflow of foreigners and increased local travels. According to an estimate, there will be around 125,000 trucks and long-haul cargo vehicles on the route between Gwadar and Kashgar once the Gwadar port is fully operational. This may be providing an ultimate opportunity for Pakistan's Hospitality Business to flourish. This also has potential for women employment. There is no other association representing hotel industry in Baluchistan.

Conclusions, Recommendations, Road Map

PHA is the only association representing hotel industry in Pakistan at national level with members in all the provinces. PHA has a strong network and all additions and expansions in hotels are in their data. They also participate in human resource development of the hotel staff. It will be beneficial to engage them as a partner at national level including Baluchistan to develop desired qualifications and possible solution for delivery of training in Baluchistan. This is the only organisation that can be of any support in the Hotel industry.

Next steps

- Arrange a consultative meeting with PHA and discuss approach for cooperation at national level including Baluchistan.
- Discuss their involvement as SME support in designing and assisting in introducing trades on hotel industry.
- Involve them as CVT partner to involve their member hotels in Baluchistan.

BWBA⁴

Item	Details
Name	Baluchistan Women Business Association (BWBA)
Address / Headquarter	House No B 29, Chaman Housing Scheme, Airport Road Quetta Phone: (0332) 7942169 web site : bwba.org.pk Email: chairperson.bwba@gmail.com
Key contact / focal person(s)	Ms. Sana Durrani, Chairperson Ms. Saima Yaqoob– Secretary General
Organisational form	BWBA represents Business women in Baluchistan and provide united platform for the inspiration and empowerment of women in business and trade.
Legal status	It is a registered association with Director of Industries and Commerce since 2014.
Brief history, founding year, etc.	Established in 2014 to identify potential business women and support them in their trade and business through capacity enhancement opportunities. It has 5000 home based workers member and 50 enterprises.
Purpose	The purpose of this Association is to engage women members that are interested and willing to start or have a legal business to guide them and build their capacity for effective running of the business.
Governing Body	It has a seven-member governing body and advisory committees on different functions.
Services	Skill Enhancement and capacity building Product Development and Designing Technical Upgradation Quality Assurance Marketing and Promotional Support Financial Support Linkage with Microfinance Institutions.

Findings

Baluchistan Women Business Association was established in 2014 with a mission to identify potential business women and entrepreneurs in the province to support them in their trade and business by providing capacity enhancement opportunities to help professionally through leadership, education, networking, mentoring, and supporting to play a role in national economic field. Out of many objectives one of their objectives is to coordinate and partner with government to support girls' education and training to enhance social position of the women. They support skill enhancement and capacity building.

⁴ Organizational profile of BWBA

Conclusion, Recommendation, Roadmap

It is progressive association representing women. They have passion to drive professional growth in women and it is a dynamic association. The president is also part of the Quetta Chamber of Commerce and Economics. Although, the association has more focus on entrepreneurship and engage home based workers for utilizing their skills at different business; they can be pursued for women development in Baluchistan. It is a sensible association working for women and with desire to achieve their objectives. They have arranged different training sessions for the member organizations and women but they have no experience in TVET and would require capacity building.

Next Steps

- Start a consultative discussion and agree on the level of engagement.
- Utilize them to promote the professions where women can play a major role.
- Finalize the terms of references.
- Conduct the capacity building sessions for the association.

Gwadar Education Welfare Society (GEWS)⁵

Item	Details
Name	Gwadar Education Welfare Society (GEWS)
Address / Headquarter	<p>GEWS Reference Library near Mir Ghaus Bakhsh Bezanjo stadium Union Council, Southern Harbor Road, Gwadar.</p> <p>Phone: (086)4210218, (0333)-2033260, (0333)2031615 Email: thegews@gmail.com, kbfiaraq@gmail.com</p>
Key contact / focal person(s)	Mr. K. B. Firaq – President
Organisational form	GEWS provides the professional and social betterment of Gwadar fishermen by taking many initiatives and activities. Currently GEWS is serving as a wide network of fishermen.
Legal status	Gwadar Education Welfare Society (GEWS) is non-governmental organization and not-for-profit organization. It was registered in March 2006 with the social welfare department of Baluchistan under the “Voluntarily Social Welfare Agencies Ordinance 1961 to improve the livelihood of fishermen community.
Brief history, founding year, etc.	Back in 2005, a group of socially active people envisioned the idea of an organization that could create a bonding among fishermen community, offer solutions to their common but important social and professional challenges. It has 150 members.
Purpose	GEWS works for education, health, coastal life protection and economic development of communities through provision of work related knowledge and skills, technical assistance and partnership building.
Governing Body	It has a 7-member executive body and 12 members advisory board.
Services	<p>Marine life protection</p> <p>Education</p> <p>Youth Development</p> <p>Promotion of Healthy Hygiene Practices</p> <p>Gender Equality and Women Empowerment</p>

Findings

The Association is established and is working for improving the lives of fishermen. They Promote education, health, and economic development of underprivileged people, help fishermen community, and protect marine life and enhance women empowerment and youth development. They are concerned with the condition of fishermen life and want to contribute in improving their lives. Baluchistan coast is home to multiple species of shrimp, crab, lobsters, and fish. This represents a tremendous potential for growth and economic benefits for the people of Baluchistan. There are 44,760 fishermen in Baluchistan. Based on the discussions

⁵ Organizational profile of GEWS

on phone and the documentation, it was found that they have created to define the goals and aims done in professional manner.

Conclusion, Recommendation, Roadmap

Although the Association is not very mature in terms of identifying the training needs but it provides a united platform to the fishermen and they seem to operate in a structured manner. They can be engaged to explore further the needs of the industry.

Next Steps

- Assessment can be done in 2019 for potential partnership if the training centre in Sur Bander is operational.

Baluchistan Fruits & Vegetables Growers & Processors Society⁶

Item	Details
Name	Baluchistan Fruits and Vegetables Growers & Processors Society
Address / Headquarter	47-C Block – 4 Seattleite Town Quetta. Phone : (0334) 2378008 Email : baloch344@gmail.com
Key contact / focal person(s)	Mr. Sami Baloch – President
Organisational form	It provides a united platform for the Horticulture business in Baluchistan.
Legal status	It is a registered association with Director of Industries and Commerce.
Brief history, founding year, etc.	Established in 2015 and has 325 members. It was started for experience sharing in Horticulture growing and processing.
Purpose	The purpose of this Association is to support its members in capacity building for the development of exports, processing and growing the sector. It covers Quetta-Mustang-Qalat-Pishin-Ziarat
Governing Body	It has 7-member governing body.
Services	Experience Sharing Sharing new business ideas Supporting to develop Export Supporting in development of storage facilities. Supporting in arranging financial support if required

Findings

The association supports the fruit and vegetable growers in Baluchistan in an advisory role. It has 325 members. They Support and advise for the development of horticulture exports and growth of the sector. The Society acts as a pivot to support the export and processing of fruits and vegetables for their members. The current average sale of the members is around Rs. 650 million. Most of the workers hired by member organizations are unskilled and illiterate. Currently the association is not involved in hiring or skill development process for its members.

Conclusion, Recommendation, Roadmap

The association has a good representation of the sector and understands the need for skill development. The association has membership and can bring members to one platform to sell

⁶ Organizational profile

and implement the idea. The association has not worked on skill development in the past so it will require efforts to build their capability from scratch. The members are also not very literate. They can be engaged to explore further the needs of the industry. There is no Institute offering regular class room TVET training on Agriculture. There are two functionaries – Agriculture – Women Division and Agriculture Research Institute. They arrange short courses on farming for females and males respectively. The courses are mobile and Institute based. To start a regular session, these two departments can be used to design the relevant qualifications along with Baluchistan Fruit and Vegetable Growers and Processors Society and potentially Baluchistan Agriculture College can be contacted through Secretary Agriculture to start TVET

Next Steps

- Assess the organization in end 2018 for development of NVQF standards to start and possible partnership. on agriculture in addition to their regular programs

Conclusion and Recommendations

- Baluchistan is bestowed with natural resources and a coastline. Its resource potential is so far untapped.
- The development has been poor due to staggered population, weak infrastructure, and limited investment. The vast reserve potential remains untouched.
- Security situation is unpredictable.
- There are number of Technical and Vocational Training Centres in Baluchistan but are supply based. They lack instructor's training. TTC Quetta could not run the CNC section as there is no trained instructor for it. Similarly, simulators donated under FIT program by TVET SSP, GIZ are not fully utilized due to lack of instructor training.
- The availability of data on skill development, future demands, training needs, job placement and tracking of alumni is non-existent.
- Due to limited business activity, the trade or business associations are few and in some areas non-existent. Due to lack of exposure they are not conversant with the skill development process.
- To implement CVT model in a sector, the main components are trade association related to that sector, training institute offering the desired training and the curriculum based on CBT&A. Unfortunately, in Baluchistan it is very hard to get all components existing for a given sector.
- The approach taken was to identify the sectors having importance in the economic development of the province and then propose workable implementation proposal to manage TVET deployment.
- The economic progress envisioned in the CPEC and the sectors with natural advantage are evaluated.
- The main sector that is likely to grow is Services. Within Services, activities of supply chain will play a key role.
- CPEC has major portion of investment on construction of infrastructure, power houses and ultimately building Gwadar Port City. Currently, there is a shortage of construction workers. Any association representing construction was not found in Baluchistan. However, FWO is conducting major construction activities so they should be contacted in Islamabad for possible support.
- In CPEC, there is a plan to build manufacturing zones that will introduce manufacturing units. In addition, Baluchistan has finest reserves for marble and there is a dedicated industrial park to process the marble. This will require people to be developed in trades to support manufacturing.

- The need for Hotel Industry is growing the occupancy has gone up from 35 percent to 80 percent. New hotels are expected to enter the market. This will require multiple skills within hotel industry.
- Fisheries is an important sector as Baluchistan is bestowed with an ideal Coast line. Pakistan has potential to increase export by three folds. A mega Fish processing unit is part of CPEC.
- Minor Crops has a potential to grow. Baluchistan has multiple climate zones that are good for production of different variety of fruits. The current yield is low due to high wastage and use of conventional methods. There is huge potential to improve yield and introduce value added products. Water is an issue and efficient ways of irrigation will help.
- The women population is 47 percent and literacy rate is 25 percent only. The participation of women in economic development is inevitable. The sectors where women can participate are Supply Chain, Hotel, and Health Care. The area of health care workers needs to be explored more.
- The informal sector gets the skill development through Ustaad-Shagird System. The workforce can be certified through RPL and RCC.
- The relevant private sector organizations that have potential for consideration as partners and have linkage to the identified sectors are;
 - Pakistan International Freight Forwarders Association
 - Lasbela Chamber of Commerce & Industry
 - Pakistan Hotel Association
 - Baluchistan Women Business Association
 - Gwadar Education Welfare Society (GEWS)
 - Baluchistan Fruit and Vegetable Growers and Processors Society
- The sector and sub-sector identification work concentrated on the broad level identification of economic segments and related chambers and associations. Identified job opportunities, skills gap and training needs are wide-ranging and categorize the general requirements of the industry. It will require detailed analysis involving companies and selected training institutions agreeing on the qualifications to be addressed, using appropriate training methodologies and facilities.

Way Forward

Immediate: Sectors Having Training Provider & NVQF

- Industrial (Manufacturing)
 - Connect with LCCI for possible partnership. This will give a foot print of TVET in Baluchistan and will cover the manufacturing sector.
- Industrial (Construction)
 - Conduct Meeting with the training providers for partnership on construction trades that are currently being offered.

- Conduct meeting with FWO for possible OJT of the candidates of construction trades.
- Services (Supply Chain)
 - Conduct meeting with PIFFA for support to initiate the training in Supply Chain for trades that already have the NVQF prepared and proficient training providers
 - Take BWBA on board to promote women participation in these trades.
- Services (Hotel)
 - Conduct meeting with PHA to support in the programs for which the NVQF standards and capable training providers exist.
 - Take BWBA on board for women participation.

Review in 2018: Sectors Having Capability of Training Provider but NVQF not available

- Conduct review sessions with PIFFA, PHA, BF&VGPS, FWO and Ministry of Health for the sectors for which training providers have capability but the NVQF standards are not available, to agree if the relevant qualifications can be developed by end 2018.

Review in 2019: Sectors that requires review in 2019. (Training Provider and NVQF not available)

- Reassess in 2019 if appropriate training providers in Fisheries, Supply Chain and Agriculture are in place and it makes sense to initiate development of NVQF.

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K B Firaq	President	GEWS	0323-2198240	kbfiraq@gmail.com

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- 1) Lasbela Chamber of Commerce and Industry web site
- 2) Pakistan Hotel association web site
- 3) Pakistan Statistical Survey
- 4) Pakistan International Freight Forwarders Association web site
- 5) Baluchistan Government web site
- 6) Pakistan TVET Sector Support Program web site.

Annex 1

Geographical Area		
Cluster Location	Sector/Subsector	Employment Potentials (3 years)
Gwadar / Quetta	Services - Supply Chain – Port Handling – Logistics – Customer Services – Warehousing	~ 600
Gwadar/ Gwadar– Kashgar route	Industrial – Construction	~ 2000
Lasbela/ Chagai	Industrial – Mining – Marble	~ 1400
Gwadar/ Quetta	Services/Hotel and Hospitality Industry	~ 1500
Gwadar Lasbela	Agriculture–Fisheries	Need Further Assessment
Quetta/Pishin /Mastung/ Kalat/Ziarat	Agriculture–Small Crops	Need Further Assessment
All Districts	Services–Health Care	~ 1000

Annex 2

Geographical Area		Potential and Related Training Establishment
Cluster Location	Chamber / Association	
National/Karachi	Pakistan International Freight Forwarders Association (PIFFA), Karachi Email: piffa@piffapk.com ; URL: www.piffapk.com	PIFFA Training Institute, Karachi (Can be used to introduce training courses in Baluchistan) Vocational & training Centre in Gwadar is under development as a part of CPEC.
Lasbela	Lasbela Chamber of commerce and Industry E-mail : info@lasbelachamber.com lasbelachamber@gmail.com Website: www.lasbelachamber.com	TTC Hub LECU
National/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 College of Tourism & Hotel Management (COTHM) Karachi (Can be used to introduce training courses in Baluchistan)
Gwadar	Gwadar Education Welfare Society kbfiraq@gmail.com	Fisheries Training Institute Sur Bander (under construction)
Quetta	Baluchistan Fruits & Vegetables Growers & Progressive Society baloch344@gmail.com	Baluchistan Agriculture College, Agriculture Department – Women Division and Agriculture Research Institute can be used to introduce related courses.
Quetta	Baluchistan Women Business Association chairperson.bwba@gmail.com	TTC Quetta TTC Gwadar Sardar Bhadur Khan University for women
National/Islamabad	FWO info@fwo.com.pk	TTC Quetta TTC Gwadar TTC Hub

TVET Sector Support Programme

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