SPORTS GOODS MANUFACTURING SECTOR SKILLS STUDY

23rd February, 2016

ACRONYMS

2D	Two Dimensional
3D	Three Dimensional
ACTED	Agency for Technical Cooperation and Development
ADB	Asian Development Bank
AJK	Azad Jammu and Kashmir
ASP	Active Server Pages
ATC	Apprenticeship Training Centres
B.A.	Bachelor of Arts
B.Com	Bachelor of Commerce
CAD	Computer Aided Design
CAM	Computer Aided Manufacturing
CCNA	Cisco Certified Network Associate
CDTC	Ceramics Development and Training Complex
CEO	Chief Executive Officer
CFC	Common Facility Centre
COTHM	College of Tourism and Hotel Management
CR&DI	Cement Research and Development Institute
CSR	Corporate Social Responsibility
DAE	Diploma in Associate Engineering
DFID	Department for International Development
DTRE	Duty and Tax Remission on Exports
EOBI	Employees Old Age Benefit Institute
F.A.	Faculty of Arts
FATA	Federally Administrative Tribal Area
FIFA	The Fédération Internationale de Football Association / International Federation of Football Associations
FPCCI	Federation of Pakistan Chambers of Commerce and Industry
GCI	Global Competitiveness Index
GCT	Government Technical Colleges
GDP	Gross Domestic Product
GIZ	German Federal Enterprise for International Cooperation
GTDMC	Gujranwala Tools, Dies and Moulds Centre
GTTC	Government Technical Training Centre
GTTI	Government Technical Training Institute
GVTI	Government Vocational Training Institute
HRD	Human Resource Development
HRD	Human Resource Development
HSSE	Health, Safety, Security and Environment ,
HVACR	Heating, Ventilation and Air Conditioning and Refrigeration
I.Com	Intermediate in Commerce
ICS	Intermediate in Computer Sciences
IDD	Industry Demand Driven

IESOL	International English for Speakers of Other Languages
IHF	International Hockey Federation
ILO	International Labour Organization
IMAC	Independent Monitoring Association for Child Labour
IPEC	International Program on Elimination of Child Labour
ISESOL	International Spoken English for Speakers of Other Languages
KPK	Khyber Pakhtun Khwah
KTDMC	Karachi Tools Dies Moulds Centre
LPDI	Leather Products Development Institute
MCSE	Microsoft Certified Systems Engineer
MIDC	Metal Industries Development Centre
MoI	Ministry of Industries
NAVTTC	National Vocational and Technical Training Commission
NGO	Non-Governmental Organization
NIDA	National Institute of Design and Analysis
OJT	On-the-Job Training
PBS	Pakistan Bureau of Statistics
PBTE	Punjab Board of Technical Education
PEF	Punjab Education Foundation
PGMEA	Pakistan Gloves Manufacturers and Exporters Association
PHMEA	Pakistan Hockey Sticks Manufacturers and Exporters Association
PHP	Personal Home Page
PIDC	Pakistan Industrial Development Corporation Ltd.
PITAC	Pakistan Industrial Technical Assistance Centre
PMN	Pakistan Microfinance Network
PPC	Production Planning and Control
PR	Public Relations
PSDC	Pakistan Skills Development Council
PSDF	Punjab Skills Development Fund
PSGMEA	Pakistan Sports Goods Manufacturers and Exporters Association
PSQCA	Pakistan Standards and Quality Control Authority
PU	Polyurethane
PVC	Polyvinyl Chloride
PVTC	Punjab Vocational Training Council
QA	Quality Assurance
R&D	Research and Development
RDAT	Regional Directorate of Apprentices Training
RFP	Request for Proposal
Rs.	Rupees
SBP	State Bank of Pakistan
SCCI	Sialkot Chamber of Commerce and Industry
SDC	Skill Development Centre
SIDC	Sports Industry Development Centre

SIE	Small Industrial Estate
SME	Small and Medium Enterprise
SMEDA	Small and Medium Enterprise Development Authority
SOP	Standard Operating Procedure
STI	Staff Training Institute
TEVTA	Technical Education and Vocational Training Authority
ToT	Training of Trainers
TPU	Thermoplastic Polyurethane
TRTA	Trade Related Technical Assistance
TSP	Training Service Provider
TTC	Technical Training Centres
TTI	Technical Training Institutes
TUC	Technology Upgradation Centres
TUSDEC	Technology Upgradation and Skills Development Company
TVET	Technical and Vocational Education and Training
UAE	United Arab Emirates
UK	United Kingdom
UKAid	United Kingdom Agency for International Development / Department for International Development
UNICEF	United Nations Children Fund
UNIDO	United Nations Industrial Development Organization
USAID	United States Agency for International Development
VTC	Vocational Training Centres
VTI	Vocational Training Institute
WFSGI	World Federation of the Sporting Goods Industry
WTO	World Trade Organization

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EXECUTIVE SUMMARY

Punjab Skills Development Fund (PSDF) is a company established by the Government of the Punjab in partnership with Department for International Development (DFID) UK. PSDF commissions vocational training by engaging training service providers (TSPs) through a competitive bidding process. It designs training schemes that allow for quality and cost competition among training providers from different sectors, leading to availability of skilled labour in the sector.

Nielsen Pakistan was commissioned the task to conduct a Sector Skills Study on the Sports Goods Manufacturing Sector of Pakistan, concentrated in the Sialkot region. This study consisted of total 100 exploratory interviews with industry stakeholders and Training Service Providers (TSPs) and 300 quantitative interviews with sports goods manufacturing establishments. Out of these firms, 198 were formal establishments while 102 were informal establishments. This report presents the overall findings of desk research, exploratory interviews and quantitative survey of manufacturing firms.

Characteristics of Manufacturing Establishments

Sialkot city and its outskirts form the hub of the sports goods manufacturing sector in the country with over 2500 firms operating within the sector. These include formal units, informal cottage units, makers/vendors and home based occasional producers. Among these firms, the number of manufacturing units which are involved in regular manufacturing can be estimated at 1500, while the rest are of temporary and seasonal nature (formed and operated only when an order is received and later on closed). Out of this number, some 400 firms are involved in manufacturing of inflatable balls, while an equal number of firms produce gloves and other protective gear. The rest 700 units are associated with other sports goods like wooden items, leather balls, composite-based items and gymnastic tools, etc.

The majority of sports goods manufacturing firms (85%) fall under the Small & Medium Enterprises (SME) category in terms of revenue and number of employees as defined by the Small & Medium Enterprise Development Authority (SMEDA). Only 15% firms can be categorized as 'Large' establishments and these cater to the global renowned brands including Adidas, Nike, Puma and Reebok. The industry is export oriented, with 59% firms exporting their products to international markets. Due to the prevalence of small size firms in the industry, budget for training, investment in technology and infrastructure is limited.

Characteristics of Workforce

At the manager level, majority of the workforce is employed with permanent contracts and wage structures (92%). However, at the worker/operator level, only 33 percent of the workforce is hired as permanent employees. The firms employ workers on temporary contracts whenever they receive an order. Therefore, seasonal employment is a pervasive characteristic of this sector. The representation of women in the industry is very low, at 5 percent of the total number of workforce size. The representation is higher at the worker level (8%) which can be attributed to the use of women for stitching purposes in the football and gloves category. The minimum monthly wage average in the

industry remains lower than the national wage rate at PKR. 9300 only, for worker level employees. At the manager level, the minimum monthly salary average is PKR 16000 only[1].

Current Training Status

There are 36 institutes of technical & vocational training located in Sialkot and Narowal districts, run by various bodies including Technical Education and Vocational Training Authority (TEVTA), Punjab Vocational Training Council (PVTC) and the private sector TSPs like Leather Products Development Institute (LPDI), Sialkot College of Engineering & Technology, Standard Polytechnic Institute and Trigon College of Technology, etc. Out of overall 85 courses taught in these institutes, only 15 (i.e. 18%) are directly related to sports goods industry.

Sports Goods Sector of Sialkot is largely labour intensive with little benefits derived from mechanization. The most visible impact of mechanized processes in the sector is seen in the introduction of machine stitching of inflatable balls. The public and private sector TSPs contribute only a small percentage of trained workforce to the sector, leaving the traditional *ustaad & shagird* (i.e. master & helper) system[2] to fill the gap. Furthermore, the inclination of manufacturing firms towards direct recruitment from training institutions is low. Only 70-80 large and progressive sports goods producers in Sialkot possess inclination towards skilled workers qualified from TVET institutes, while medium and small sized companies still prefer the conventional master & helper system. Besides, the number of firms with in-house formal training departments is also negligible. The prevalence of qualified skilled workers in sports goods industry is very low. Hardly 2,000 personnel among the overall 55,000 employees in the sector would have obtained some technical training in an institute. This situation indicates a gap of skill-to-market-linkage for these training service providers. This can be attributed to the lack of courses which are directly relevant to the sports sector.

The results of both exploratory interviews and quant survey indicate that the sports goods producers are currently satisfied with the quality of employees that they receive. However, only 8% of the firms reported that their manager level staff was not prepared for the respective jobs and only 3.6% firms reported the same for their worker/operator level staff.

Training and Skills Needs Assessment

At the manager level, only seven out of 300 interviewed firms had vacant positions. The highest future projected demand was for the positions of Marketing Officer (10 posts)Marketing Manager was also the only hard to fill vacancy at the manager level in the firms. At the worker level, 14.3% of the firms had vacant positions for Stitcher, Machine Operator, Wood Jointer, Sampler, Technician, Sales Boy, Packer and Manual worker/helper. The projected demand was the highest for Stitchers with an estimated need of 504 more stitchers during the next 3-5 years. At the sector level, the total technical workforce demand for the next five years stands at 71,183. The highest demand is for machines stitchers for gloves and other protective gear at 26,225 workers, followed by hand stitchers for inflatable balls (13,767) and machine stitchers for inflatable balls at 4571 workers.

[1] Maximum and Minimum salary ranges for worker level and manager level staff was asked from establishments which were then averaged out.

[2] Ustaad & Shagird (i.e. master & helper) is an apprentice system where a fresh untrained person (trainee/*shagird*) is hired under a trained person (master/*ustaad*) as a helper. Passing through gradual learning process, the trainee gets expertise of the job. The learning process however is quite slow and can take some months to some years to complete.

At the worker level, the skills needed include industrial stitching (61% of firms), fabric printing (25%), woodwork (8%) and electrician (5%). At the manager level, 37% of the firms believe their managers need numeracy skills, equaled by another 37% who require teamwork skills. The discussions with sectors experts have also revealed that courses for Composite Technology, Digital Marketing and Lean Production System are required to enable the industry to cope with the increasingly competitive international manufacturing standards and to progress.

The analysis of production processes of various sub-sectors indicates the need of courses in almost 20 trades or skills. Some of these courses are already being offered at existing TVET institutes, while the rest are completely unexplored. The report includes detailed recommendations on training courses that are needed in the sector along with their duration. These have been recommended keeping in mind not only the present skill gaps in the sector but also the changing dynamics of Sports Goods market globally. The highly recommended courses include Screen Printing & Graphic Designing, Sublimation Printing, Rubber Technology, Pattern Making, Gloves Machine Stitching, Composite Technology, Digital Marketing and Lean Production System. The sector experts also stress that these training courses should be launched in collaboration with existing institutions in the region which notably include TEVTA, Sports Industry Development Centre (SIDC), Leather Products Development Institute (LPDI) and the private technical institutes affiliated with PTBE.

1. INTRODUCTION

1.1 Background

The sports goods manufacturing sector of Pakistan boasts of a rich history and a vibrant manufacturing base. Initially rising as a cottage industry, the sector now consists of well-developed manufacturing units in and around Sialkot city of Punjab. Over the time, Sialkot and its adjacent areas have developed into a cluster for manufacturing sports goods, banking on historical knowledge and availability of skilled craftsmen. The flagship product for this cluster is the inflatable ball (mainly soccer ball) which has played a large part in gaining the area international recognition. Pakistan caters to almost 70% of the global demand for inflatable balls[3]. Other products being produced in Sialkot region are cricket bats, hockey sticks, tennis rackets, indoor games and protective gear including sports clothing, gloves, pads etc.

Sialkot has the distinction of supplying to world renowned brands including Nike and Adidas. The industry provides employment to thousands of skilled and non-skilled professionals from all over the country and is a significant contributor to annual exports of Pakistan. In 2014, sports exports from the country exceeded US$ 360 million[4]. Considering the contribution of the industry to the employment market and export competitiveness of Pakistan, it occupies a prominent position from a skills development perspective.

Despite all the milestones and success of the sector, the sports goods manufacturing industry of Sialkot is still largely a labour-intensive one. Manufacturers rely on traditional knowledge and have over the time added only few semi mechanized processes to their work. The dependence on workforce to operate the machines reduces their advantage. Most manufacturing takes place in informal and unregistered cottage set ups using manual labour and little skilled input. While Pakistan has traditionally enjoyed the privilege of providing high class products of fine quality, competition from countries like India, Bangladesh, China and Taiwan are fast catching up and providing tough competition. These markets rely on their mechanized processes to deliver low cost and precise products in bulk.

Considering this, there is a need to audit the sector from a global competitiveness perspective and to develop local manufacturers and workforce. Interventions aimed at upgrading the technical skills of the workforce in the industry to set manufacturing standards are required. These interventions can best be applied after a critical assessment of the current and future needs of the industry is carried out, which will point at the key requirements for the sector.

In line with the need for such an assessment, this sector skills study has been commissioned by the Punjab Skills Development Fund (PSDF)*. The study was carried out by Nielsen Pakistan during the period April-August 2015 and contains exploratory interviews with industry stakeholders and a survey of local establishments in Sialkot.

[3] PSDF Request for Proposal
[4] Monthly Bulletin of Statistics Aug 2014; Pakistan Bureau of Statistics (http://www.pbs.gov.pk/sites/default/files/other/monthly_bulletin/monthly_bulletin_of_statistics_august_14.pdf)

1.2 Research Objectives

Specifically speaking, the objectives of this research were to explore the following questions:

- To assess current skill levels, both vocational and professional, in the sports goods sector of Punjab
- To identify skills delivery gaps and the contribution required of other industry players
- To inform PSDF's plan to strengthen the skill potential of workers in the sector; this will include identification of trades in demand, training courses required and training delivery options
- To help PSDF develop medium to long term targets for human resource development (HRD) for the sectors focusing on vocational and technical skills
- To help PSDF identify key actions for technical and vocational education and training (TVET) policy and practice that will strengthen the sectors and indicate complimentary policy actions to deal with HRD issues

*The mandate of Punjab Skills Development Fund (PSDF) dictates to maintain focus on human resource needs of different industrial sectors. To this effect, the fund has launched many sector studies of which Sports Goods Sector is the one. The organization is aware that there exists a mismatch between the demand for specific skills and available supply in sports goods manufacturing industry. The aim for this study is to focus on skills needs of the sports goods manufacturing industry.

1.3 Research Design

The research objectives have been achieved through a multi-pronged methodology, i.e.

- Desk Review
- Exploratory interviews of Sector Experts related to establishments, Training Service Providers (TSPs) On The Job Training (OJT) providers, and
- Quantitative Survey of Firms

1.3.1 Desk Review

Prior to the start of fieldwork, a review of existing literature on the sports goods manufacturing industry of the country was carried out. This helped develop a base of information that was already available, particularly from the SMEDA, United Nations Industrial Development Organization (UNIDO) in Pakistan and private research carried out by academicians and industry experts.

The desk review also included analysis of industries in other countries competing with Pakistan. Furthermore, a list of progressive and leading firms was prepared from the information provided by SMEDA and Sialkot Chamber of Commerce Industry (SCCI).

1.3.2 Exploratory Interviews

As part of the study design, some 100 exploratory interviews were carried out with stakeholders belonging to sports goods sector and related TVET sector. The break-up of these exploratory interviews is as under:

Table 1: Sample for Exploratory Interviews

Sector	Segment	No. of interviews
Associations and Sector experts	Associations, industry support bodies and TSP related entities	12
	Sub-total	12
Establishments	Inflatable Balls	20
	Composite Based Products	6
	Protective Gears	24
	Others	6
	Sub-total	56
TSPs and OJT Providers	TVET regulatory and execution bodies	2
	TVET Institutions	25
	OJT related	5
	Sub-total	32
Total		100

1.3.3 Quantitative Survey of Firms

The third tier of the research design consisted of a quantitative survey of 300 sports goods manufacturing firms. This was done through a structured questionnaire which collected information on the following four areas:

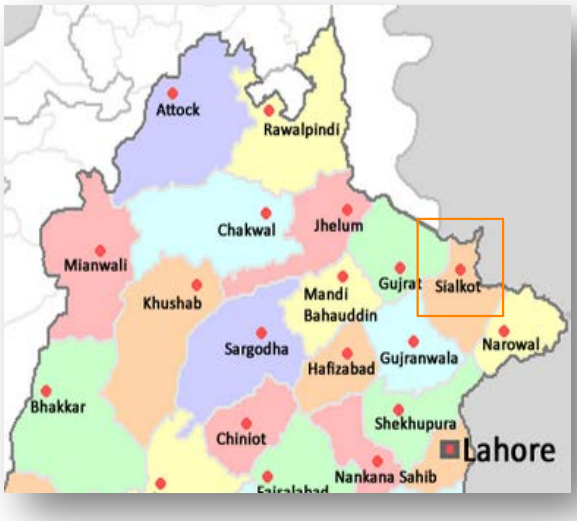
- Characteristics of Firms
- Characteristics of Workforce
- Current Skills Training Status
- Skills Training Needs Assessment

The methodology details and findings of the quantitative survey have been discussed in section 2 of the report.

2. INDUSTRY SNAPSHOT

2.1 Profile of Sialkot

Sialkot is the capital city of Sialkot District in the north-east of the province of Punjab. It is the 13th largest metropolitan area in the country by population, covering an area of 3013 Km and with the population of around 1.7 million.[5]



It is bounded to the north by the working boundary of Jammu, to north-west by Gujrat, to the west by Gujranwala and to the south by Narowal. The Chenab River flows to the north of Sialkot. The district is administratively divided into four tehsils (subdivisions), i.e. Sialkot, Daska, Pasrur and Sambrial.

Historically, this area has been an important junction of intra-regional trade as well as a stopover point for most invaders attacking the sub-continent from Central Asia. The people of the area are sturdy and hardworking. A considerable portion of the population comprises artisans having expertise in metal forming (surgical), woodworking, leather processing, apparel stitching and sports goods production, etc. It is due to these artisans that the city has become an important international city for the production of sports goods, surgical instruments, leather garments, gloves and musical instruments.[6]

The history of industrialization of Sialkot can be traced down to the era of Mughal Empire, when Jahangir (1605-1627) ordered skilled labour of Sialkot to manufacture some war weapons for his army. Later in 1870, the leather industry started to grow in Sialkot as a huge demand of horse saddles and other leather equipment had been created. Later in 1922, Syed Sahib was the first person who was awarded the contract for supplying footballs to the British Army. Over the years, this industry grew and Sialkot became the capital of sports goods, especially hand stitched football in the world.[7]

Currently, Sialkot is the hub of Sports Goods manufacturing in Pakistan with major product segments of inflatable balls, gloves & protective gears, wooden products, composite-based products and sportswear. The value chain includes marketing & export companies, raw material suppliers, production units and partial job vendors. The production processes at the manufacturing units vary depending on the type of product and the size of firm. However, the involvement of human hand is high as most of the processes are manual and labor intensive. The sector involves certain skills like pattern making, cutting, screen printing, hand stitching, machine stitching, wood working and composite forming, etc.[8]

[5] The Sports Goods Sector in Pakistan – Export Performance and Potential 2007
[6] The Sports Goods Sector in Pakistan – Export Performance and Potential 2007
[7] Asian Journal of Business and Management Sciences -- Declining Market Share of Pakistan in Football Industry; Tanveer, Rizvi and Riaz http://www.ajbms.org/articlepdf/ajbms201211i11102.pdf
[8] Expert interviews + Quantitative survey

Note: The detail of Evolution of Sports Goods Industry in Sialkot can be viewed in the publication 'Trade Related Technical Assistance (TRTA-II) Programme -- Draft Report on Industrial Sectors 2010; UNIDO – Pg 100-101' (http://trtapakistan.org/wp-content/uploads/2011/01/Sector-Report-Industrial-Products.pdf)

2.2 Manufacturing Capacity

More than 2500 establishments are engaged in the production and export of sports goods in Pakistan[9]. These include formal units, informal cottage units, makers/vendors and home based occasional producers. Among these firms, the number of manufacturing units which are engaged in regular consistent manufacturing throughout the year can be estimated at 1500[10], while the rest are of temporary and seasonal nature (formed and operated only when an order is received and later on closed). These consistent manufacturing units are highly labour intensive and engage around 55,000 personnel hired in them[11]. The culture of contracted labour and outsourcing is quite common here, while only large and organized units have permanent labour.[12]

Besides the manufacturing units, hundreds of stitching centres and service providers (generally called makers) exist in and around the city that are approached by the manufacturers for outsourcing their jobs. These are usually cottage set ups and are run from homes and shops.[13]

> "Contractors take the material from large football units and get them stitched from hand stitchers in rural areas of Narowal, Zafarwal, Merajke, Chawinda, etc. Even they get it done from other districts like Gujranwala, Gujrat and even Faisalabad."Malik Asad Ali, Proprietor M. Zaheer Sports

Majority of manufacturers are engaged in the production of inflatable balls, sportswear and sports gloves, while others produce the items like cricket bats, hockey sticks, rackets, cricket balls, hockey balls, tennis balls, protective gears and exercise and gymnastic equipment, etc.[14] Sialkot city is the hub of the sports goods manufacturing clusters. The manufacturers in Sialkot are the official suppliers of major international brands including Adidas, Nike, Puma, Select, Lotto, Umbro, Mitre, Micassa, Diadora, Wilsoms and Decathion, etc.[15]

[9] Expert interviews
[10] Expert interviews + Sialkot Regional Profile; FPCCI (http://www.fpcci.com.pk/reports/Sialkot%20Regional%20Profile.pdf) + Trade Related Technical Assistance (TRTA-II) Programme -- Draft Report on Industrial Sectors 2010; UNIDO (http://trtapakistan.org/wp-content/uploads/2011/01/Sector-Report-Industrial-Products.pdf)
[11] Worked-out on the basis of leads gathered from expert interviews
[12] Expert interviews + Trade Related Technical Assistance (TRTA-II) Programme -- Draft Report on Industrial Sectors 2010; UNIDO (http://trtapakistan.org/wp-content/uploads/2011/01/Sector-Report-Industrial-Products.pdf)
[13] http://www.ilo.org/global/about-the-ilo/newsroom/features/WCMS_071247/lang--en/index.htm
[14] Sialkot Regional Profile; FPCCI (http://www.fpcci.com.pk/reports/Sialkot%20Regional%20Profile.pdf)
[15] http://www.pakistantoday.com.pk/2014/05/26/sports/42-million-soccer-balls-exported-from-sialkot-for-fifa-world-cup/

The break-up of manufacturing base among various segments is as under:

Table 2: Manufacturing Base of Sports Goods Manufacturing Sector

Category	No. of units	No. of employees
Inflatable balls	400	15,000
Gloves and other protective gears	400	12,000
Composite-based products	20	1,000
Wooden sports products	100	5,000
Sportswear	300	12,000
Other items	280	10,000
Total	1500	55,000

Source: Estimates based on expert opinion and multiple secondary sources

Note: These do not include makers/vendors, occasional producers and sublet football stitching centers.

The number of large, medium and small units in different segments is estimated to be as under:

Table 3: No. of Units by Product Category and Unit Size

Category	Total no. of units	Split by unit size		
		Large	Medium	Small
Inflatable balls	400	50	100	250
Gloves and other protective gears	400	70	100	230
Composite Hockey	20	-	5	15
Wooden sports products	100	10	20	70
Sportswear	300	50	50	200
Other items	280	50	80	150
Total	1500	230	355	915

Source: Estimates based on expert opinion and secondary sources

Figure 1: Industry split by product category

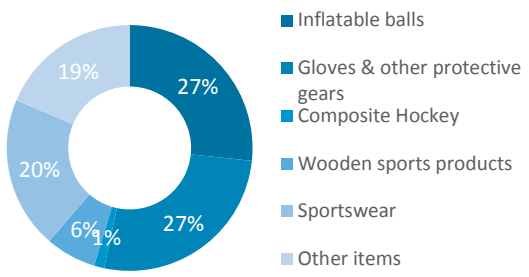
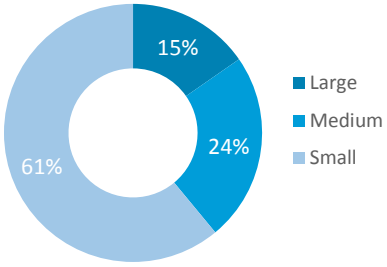


Figure 2: Industry split by unit size



Large units are the suppliers of renowned global brands like Adidas, Nike, Mikasa, Puma, Select, Erimma, Reebok, Slazenger, TK, Griffen, Obo, Stag, Brabo and STX, etc., while some of them have their own brands with global recognition, e.g. CA, Eshan, Grays, Malik, AM, Alitra, Model, Chenab and Metador, etc. On the other hand, the medium-sized units cater to the middle and lower segments of the global market, while small producers export to small importers and sometimes provide vendor services to large and medium units in Sialkot. The industry is dominantly export oriented.

2.3 Football Hand-Stitching Centres

Since 1996, an estimated 7000 children were stitching footballs in Sialkot. Later in 1997, the ILO launched the 'International Program on Elimination of Child Labour (IPEC) in the Soccer Ball Industry in Sialkot' in collaboration with the Government of Pakistan, FIFA, the World Federation of the Sporting Goods Industry (WFSGI), trade unions, manufacturers, UNICEF and NGOs. The project was so successful that child labour was completely phased out by the year 2000.[16]

Under the program, thousands of formal stitching centres were established to transfer the work from homes to these centres. Now, the bulk of football stitching has been transferred from homes to these stitching centres.[17]

Some 2300 stitching centres are based in Sialkot district, while 300 are located outside the district. Each centre should consist of at least 5 stitchers, while the upper limit can be in hundreds. Some 40% of stitching centres are male stitching centres, 35% female stitching centres, 15% combined centres and 10% house-based stitching centres.[18]

Majority of the stitching centres have been established by football manufacturers and they get their footballs stitched there through ad hoc labour contractors. Some other stitching centres have been established by individuals who receive the stitching orders from manufacturers and get them done

[16] http://www.ilo.org/global/about-the-ilo/newsroom/features/WCMS_071247/lang--en/index.htm
[17] http://www.ilo.org/global/about-the-ilo/newsroom/features/WCMS_071247/lang--en/index.htm
[18] Expert interviews + IMAC website

through ad hoc labour. A hand-stitcher generally sews 3-4 footballs a day and earns Rs. 80-120 per football, i.e. Rs. 300-450 per day. The income of a worker who manages to work the entire month can be in the range of just 8000 to 13000 per month. On the contrary, a construction worker can earn Rs. 14000-15000 and a mason Rs. 25000-30000 per month[19]. Hence a skilled football stitcher earns even lower than a construction worker. Due to low wages in football stitching, people prohibit adopting it as a permanent profession; rather it is done as a part time or ad-hoc work by women, farmers and general people during their spare time.[20]

[19] Expert interviews
[20] Expert interviews

2.4 Sports Goods Produced

The major categories of sports goods products in Pakistan include inflatable balls, sports gloves, composite and woods based products, protective gear and sportswear, etc. The major products under each segment are as under:

Table 4: Sports Goods Segment and Products

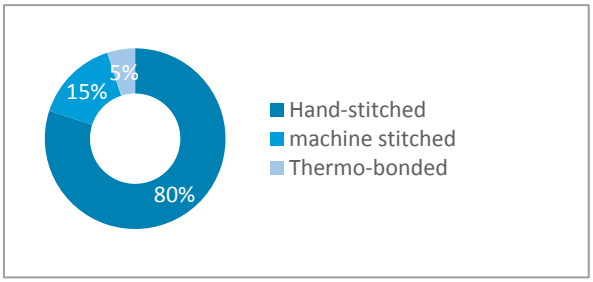
Inflatable Balls	Composite based Products	Wood based Products	Protective gears	Sports Gloves	Other balls	Sports Wear	Misc.
Soccer balls Futsal/Sala balls Volley balls Hand balls Basket balls Net balls Latex rubber bladder, etc.	Field hockey sticks Roller hockey sticks	Cricket bats Field hockey sticks Roller hockey sticks Polo sticks Cricket wickets Lawn tennis rackets Badminton rackets Squash Rackets Carom boards Chess boards, etc.	Shin pads Elbow and knee pads Cricket thigh pads Abdominal guards Chest guards Holsters Cut resistant vests Hoods, etc.	Batting gloves Goal keeper gloves Wicket keeper gloves Baseball gloves Boxing gloves Cycling gloves Biking gloves, etc.	Cricket balls Hockey balls Lawn tennis balls Table tennis balls Punching balls, etc.	Sportswear Track suits Sports uniform Sports shoes, etc.	Badminton Shuttle Cocks Exercise and gymnastic equipment Football bladder Sports bags Cycling and biking equipment Punching bags Sports nets, etc.

2.4.1 Inflatable Balls: Around 400 units are engaged in the production of inflatable balls including soccer balls, futsal balls, volley balls, hand balls, basket balls and net balls, etc.

Over 80% of all footballs produced in Pakistan are hand-stitched, while 15% machine stitched and 5% thermo-bonded balls.

The major producers are Forward, Capital, Silver Star, Talon, Awan, Alberta, Comet, Medrigal, Ambassador, Broomley, Penna, Eureka, Khalid Oversea, K.M. Ashraf, Sublime, Anwar Khawaja, Vital, etc. The same are the producers of multiple types of football, i.e. hand-stitched, machine stitched and thermo-bonded. On the other hand, the medium and small players are in the production of hand-stitched balls alone.[21]

Figure 3: Types of football manufactured



2.4.2 Sports Gloves and other Protective Gears: This segment comprises of some 400 units that manufacture different types of sports gloves and other protective gears like shin pads, elbow pads, knee pads, thigh pad, abdominal guards and chest guards, etc. Some of these also manufacture mechanical gloves and working gloves alongside sports gloves. The major producers include Talon, Abson, Ace, Akhter Yousaf, Akita, Alberta, Anwar Khawaja, CA, Comet, Mellow, Astek, Jaffson, Penna, Unik and Top-in-Town, etc.[22]

2.4.3 Wood-based products: Around 100 units are working in this segment within Sialkot city and surroundings. They manufacture various wood-based products like cricket bat, cricket wickets, hockey stick, polo sticks, rackets, carom board and chess board, etc. The major players in this segment include CA, Ehsan, AM, Malik, Model, Barna and Exact, etc. Some of these produce composite version of hockey and bat as well.[23]

2.4.4 Composite-based products: This is among the smallest segments yet due to low adoption of composite technology by the players in Sialkot. Around 20 players exist in this segment including Grays of Cambridge (Anwar Khawaja), Ali Trading (Alitra), Malik, Ehsan, Model, Maxima, Chenab, Dita, Sialkot Sports (Alpha), Microfine, M.T. Techniques and YMS, etc. The main product manufactured by these players is field hockey stick.[24]

[21] Expert interviews
[22] Expert interviews
[23] Expert interviews
[24] Expert interviews

2.5 Export of Sports Goods

Pakistan exported sports goods of US$364 million in 2013-14.[25] The exports have grown at an average rate of 3.3% per annum during the last 3 years. Sports goods lie among the significant exportable items of Pakistan besides textiles, rice, leather, chemical and pharma and fruits and vegetables. It makes some 1.4% of overall export of Pakistan.[26]

Figure 4: Export of Sports Goods by Product

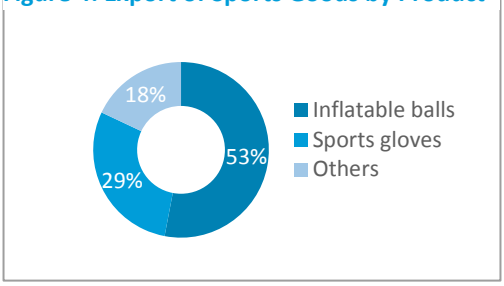
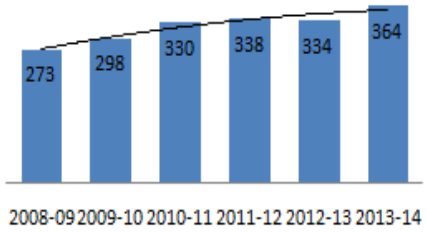


Figure 5: Export Value of Sports Goods

Table 2.5 Export Value (Million US$)						
	2008-09	**2009-10**	**2010-11**	**2011-12**	**2012-13**	**2013-14**
Export	273	298	330	338	334	364
Growth (%)	*-10*	*9*	*11*	*2*	*-1*	*9*



Over half of the export value consists of inflatable balls, while some 30% of sports gloves and the rest of other items including cricket bats, hockey sticks, tennis rackets, cricket balls, hockey balls, tennis balls, protective gears, martial arts and gymnastic equipment, etc.[27] In number terms, some 50 million inflatable balls, 38 million pairs of sports gloves and millions of other articles are exported from Pakistan each year.[28]

Export destinations for sports goods include Germany, USA, UK, France, Italy, Brazil, Argentina, Mexico, Spain, Netherlands, Hong Kong, Denmark, Canada, Belgium, Australia, South Africa, UAE and Chile, etc.[29]

The giant global football brands like Adidas, Nike, Puma and Reebok, etc. actually are not the producers themselves; rather they get footballs produced from various developing countries due to their product quality and cost efficiency. Pakistan, China and Thailand are the major hubs for this and jointly contribute 70% of total export of footballs.[30] Pakistan's main competitors in sports goods market are

[25] Monthly Bulletin of Statistics Aug 2014; Pakistan Bureau of Statistics (http://www.pbs.gov.pk/sites/default/files/other/monthly_bulletin/monthly_bulletin_of_statistics_august_14.pdf)
[26] SME Observer Jul-Sep 2014; Small & Medium Enterprise Development Authority (Download from http://www.smeda.org/index.php?option=com_phocadownload&view=category&id=46&Itemid=566)
[27] Monthly Bulletin of Statistics Aug 2014; Pakistan Bureau of Statistics (http://www.pbs.gov.pk/sites/default/files/other/monthly_bulletin/monthly_bulletin_of_statistics_august_14.pdf)
[28] Monthly Bulletin of Statistics Aug 2014; Pakistan Bureau of Statistics (http://www.pbs.gov.pk/sites/default/files/other/monthly_bulletin/monthly_bulletin_of_statistics_august_14.pdf)
[29] Pakistan Bureau of Statistics Export Database
[30] Expert interviews + Asian Journal of Business and Management Sciences -- Declining Market Share of Pakistan in Football Industry; Tanveer, Rizvi and Riaz http://www.ajbms.org/articlepdf/ajbms201211i11102.pdf

China, India, Taiwan, Bangladesh, Thailand and South Korea. These countries are giving tough time to Pakistan in international market.[31]

2.6 Import of Sports Goods

Due to the production limitations in some cases, Pakistan has to import some sports items to meet the local demand. In 2012-13, Pakistan imported some 5.5 million football bladders, 3,000 water ski boards, 17,000 golf equipment, 7,000 golf balls, 250,000 badminton rackets, 700,000 tennis balls, 400,000 badminton shuttle cocks and 12,000 cricket balls, etc. However, the total number of imported items is just a fraction of overall number of sports goods exported from Pakistan.[32]

[31] http://www.authorstream.com/Presentation/kool_zain2001-398893-sialkot-sports-industry-development-economics-education-ppt-powerpoint
[32] Pakistan Bureau of Statistics Import Database

2.7 Industry Challenges

Sports goods industry presently faces a number of challenges. These include:

- Energy crisis hampers productivity and causes the delivery problems, particularly in case of foreign buyers which already allow short lead time
- Abundance of small-sized companies with weak management skills and basic manufacturing structures leading to overall low industry labour and technical standards
- Difficulty in adapting to new technology like composite-based products and thermo-bonded mechanized footballs (the low adoption of better technology is not only due to lack of capital investment with producers, but also the lack of knowledge and skills to use modern technology.
- Global competition, particularly China's rapid progress in football and sports gloves segments
- Limited supply of TVET qualified skilled manpower and gaps in skills of existing manpower (This results in low productivity and hampers the capacity of meeting bulk orders in time)
- Higher labour turnover and low retention rate due to the shortage of skilled labour
- Contractual labour system is prevalent, especially in inflatable balls and sports gloves segments. This proves to be a barrier towards the development of permanent pool of skilled labour with the manufacturing units.
- Lack of technological advancement and mechanization for innovation and productivity
- Increasing prices of raw material, especially latex, butyl, Polyurethane (PU), Polyvinyl Chloride (PVC) and Thermoplastic Polyurethane (TPU), etc.
- Non-compliance with strict international standards for product quality, workplace, labour safety, gender discrimination and environmental protection, etc. (The investment and cost needed to comply with these standards is hard to be managed by small players)
- Political and economic issues confronting the country leading to inflation in inputs and uncertainty of operations[33]

> "Due the issues of labour shortage, energy crisis and lack of government support, we remain defensive in international market as compared to our international competitors." Muhammad Naseer, President PSGMEA

> "We face difficulty in hiring skilled machine stitchers and screen printers these days. We place banners in the city and paste ad on Chamber notice Board. But it takes time to search for the desired person." Mirza Muhammad Waqas, HR Manager Penna Overseas Corporation

[33] Expert interviews + http://www.authorstream.com/Presentation/kool_zain2001-398893-sialkot-sports-industry-development-economics-education-ppt-powerpoint/ + Trade Related Technical Assistance (TRTA-II) Programme -- Draft Report on Industrial Sectors 2010; UNIDO (http://trtapakistan.org/wp-content/uploads/2011/01/Sector-Report-Industrial-Products.pdf) + Asian Journal of Business and Management Sciences -- Declining Market Share of Pakistan in Football Industry; Tanveer, Rizvi and Riaz http://www.ajbms.org/articlepdf/ajbms201211i11102.pdf

2.8 Industry SWOT Analysis

2.8.1 Strengths: Major strengths of sports goods industry in Sialkot are:

- World's largest pool of multi-skilled labour for sports goods industry exists in Pakistan
- Highest international market share of soccer ball and major in other sports goods
- World's only place to produce high quality hand stitched footballs in bulk
- Strong infrastructure for the industry i.e. industrial estates, dry port and airport, etc.
- Low cost localization of new technologies through reverse engineering and customized solutions; i.e. small investment -- big work
- A large number of small manufacturers exist that can cater to small orders as well (China and Taiwan do not handle small orders)
- Ability to complete big orders within the given timelines through in-house and outsourced production
- Ability and capacity to handle customized orders; can focus on niche markets
- Smaller lead time vis-à-vis international competitors due to ready facilities and expert labour
- Dynamic and reliable linkages in international markets
- Strong business relations with multinational brands like Adidas, Nike, Puma, Select, Lotto, Umbro, Mitre, Micassa, Griffen, Slazenger, Obo, STX and Diadora, etc.
- Abundant availability of raw material (leather, cotton and Kashmir Willow)
- International certifications for quality, safety, environment and human rights/child labour with many companies
- Engagement of international agencies and NGOs working for development of industry and community (e.g. UNICEF, IMAC, UNIDO, USAID, etc.)
- Support of Sialkot Chambers of Commerce and other trade associations

2.8.2 Weaknesses: Major weaknesses of sports goods industry in Sialkot are:

- Majority are small sized companies with weak management skills and low progressiveness
- Excessive reliance on international brands rather than introduction of own local brands (Only a few local brands exist, e.g. CA, Grays, Malik, Ehsan, Alitra, Model, Chenab and Metador, etc.)
- Lack of product innovation, main reliance on the designs of the ordering customers
- Security situation in the country is a barrier to personal visits of foreigners for facility assessment and product development; causing diversion of orders to other countries
- Absence of standardized production processes, rather domestic solutions at each manufacturer
- Absence of internationally accredited testing labs
- Concentration in few geographical markets (international)
- Family oriented business approach (*Saith* culture) and lack of real corporate culture
- Frequent power and gas outages
- High turnover of workers due to contractor system
- Lack of inclination of new generation towards low-paid blue collar jobs in sports goods industry
- Lack of designing skills and facilities
- Lack of R&D and modern technology in the sector
- Less focus on local market (Over 95% products are exported)
- Low compliance to labour laws by SMEs due to inefficient monitoring system

- Meager share of TVET qualified skilled workers in overall workforce that cause low productivity
- New innovative raw materials not available in local market
- Poor working conditions coupled with compliance issues
- Price competition among local producers
- Switching of labour to other sectors due to comparatively lower wages in sports goods units
- Conventional marketing and selling approach

2.8.3 Opportunities: Major opportunities for sports goods industry in Sialkot are:

- Increasing trend of people towards sports globally and respective increase in demand of Pakistani sports goods
- Decreasing competition from China and other countries in Scandinavian states due to high health and safety requirements there
- Raw material development at local level (e.g. bladder, adhesives, PVC sheets, etc.)
- Exploration of new markets
- Focus on latest technologies for soccer ball, e.g. machine stitched and thermo-bonded
- Adoption of composite technology for other products like roller hockey sticks, beach hockey sticks, baseball bat, tennis rackets, squash rackets, badminton rackets, paddle rackets, lacrosse shafts, skate boards, canoe paddle, rafting paddle and fishing rod, etc.
- Growing international market size
- Joint ventures with international stakeholders
- Newly emerging markets of Middle East, Far East and Central Asian Republics
- Presence and services provision by various institutions public or private to the cluster
- Public / private focus on international branding
- Rising domestic market potential
- Support of Government and international agencies on competitiveness and compliance
- Improvement in security situation after the success of Operation Zarb-e-Azab is likely to boost local economy, while the confidence of international buyers and investors will also enhance

2.8.4 Threats: Major threats to sports goods industry in Sialkot are:

- Low competitiveness due to decrease in export prices and increase in production overheads
- Ever increasing cut-throat competition by international counterparts in China, Taiwan and India.
- The implementation of Child Labour elimination program during 2007 to 2010 took away a whole slice of potential skilled generation and now the industry is facing acute shortage of new intake and has to rely on older skilled workers. The problem would become worst when the existing older workers will be retired and they would not be replaced by their sons.
- Imposition of social, environmental, technical and compliance standards are barriers to trade
- Increasing usage of mechanized and thermo-bonded ball in international tournaments
- Increasing competition, especially with China and India, etc.
- Increasing prices of raw materials [34]

[34] Expert Interviews + The Sports Goods Sector in Pakistan – Export Performance and Potential 2007; TRTA + Trade Related Technical Assistance (TRTA-II) Programme -- Draft Report on Industrial Sectors 2010; UNIDO (http://trtapakistan.org/wp-content/uploads/2011/01/Sector-Report-Industrial-Products.pdf)

2.9 New Technology Adoption by the Sports Goods manufacturing Industry

2.9.1 Global scenario: The world of sports is continually changing and the use of technology is just one of those areas that have made an impact on many sports in the modern day. Today, leading sports goods suppliers like Adidas, Nike and Puma, etc. spend more than one percent of their annual global turnover on Research & Development. In high-tech (and tightly guarded) test labs equipped with very latest technology, the sports brands work closely with top sportsmen, measuring and recording their movements to develop equipment for optimal performance. They also work together with coaches, sports scientists, aerodynamic engineers, global hydrodynamics experts, optical engineers and psychologists to develop more efficient sports goods products. Some even have purpose-built facilities to develop and test equipment under varying conditions. Consequently, the natural materials (wood, twine, gut, rubber) used to make the equipment of yesteryear have been progressively replaced by a wide range of highly sophisticated, man-made materials, including alloys and polymers. Equipment made from these lighter, more durable materials has allowed sportsmen around the world to minimize injury and to push the boundaries of their performance.[35]

2.9.2 Pakistan Scenario: Manufacturing of majority of items in the sports goods industry is still based on manual skills of expert craftsmen. These items include hand-stitched inflatable balls, cricket bat, wooden hockey stick, wooden rackets, carom board, sports gloves and other protective gears, and cricket hard balls, etc. But the global scenario is changing quickly and the new technology and mechanization is quickly replacing the artisan's skills. Though some technologies like machine stitched football, thermo-bonded football and composite hockey have been adopted; an overall laziness exists in the industry towards timely investment into new technology.[36]

2.9.3 No adoption of metal technology in rackets segment: The first segment of sports goods sector to be adversely affected by technology was wood-based rackets (badminton, squash and tennis). Some 20 years ago, dozens of factories in Sialkot used to manufacture and export wood-based rackets, but these wiped out after the international buyers started to demand metal (Mild Steel, aluminum) and then composite based rackets. Instead of adapting to new technology, the local racket manufacturers shifted to other products like wooden bats and inflatable balls, etc. So, the industry shifted mostly to Taiwan, South Korea and Malaysia. The local industry didn't respond to the technological advancement and resultantly lost a very lucrative market unfortunately.[37]

2.9.4 Late and limited adoption of composite technology: Composites are formed by combining materials together to form an overall structure that is better than the sum of the individual components. Regarding sports goods, the composites include fiber-reinforced materials like glass fiber, carbon fiber, aramid, graphite and Kevlar, etc. The products made of composites are tougher, lighter and having better stroke.[38]

[35] http://www.wipo.int/wipo_magazine/en/2012/05/article_0005.html
[36] Expert Interviews + The Sports Goods Sector in Pakistan – Export Performance and Potential 2007
[37] Expert Interviews + The Sports Goods Sector in Pakistan – Export Performance and Potential 2007
[38] Expert interviews

The introduction of Astroturf caused the need of non-wood hockey sticks. This resulted in the innovation of composite hockey sticks. In 2001, International Hockey Federation (IHF) approved the use of composite hockey sticks with the ban on wooden sticks in international events. As the local industry was not prepared, it resisted the IHF decision and went into the international litigation to gain time. The litigation continued for almost five years, while the court decision came in favor of IHF. During that period, Pakistani manufacturers took initiative and visited China to import the technology. By the time when the decision came, many manufacturers had established the plants through direct import of technology and reverse engineering and were ready to cater to international orders of composite hockey. Though the industry was 4-5 years late in technology adoption, it still covered the space and survived. Presently, some 20 units in Sialkot are engaged in production and export of composite hockey sticks.

The adoption of composite technology is mostly individual firm level, while the practical institutional support seems non-existent. No technical training facility has been established, neither any of the existing TVET institute offers any course of composite technology. Also, the plan of establishing the Product Development Centre for Composite Products at SIDC premises has not been materialized and the vacant plot reflects the pessimistic progress of last ten years. The aim of setting up this development centre was to facilitate sports goods industry and to enable it to cope with the emerging technology of composite materials and to progress into the segment. The project was to provide services like product testing (physical and chemical), generate skilled workforce and enhance productivity of composite units. However, the project is still at its zero level.

Furthermore, the dedicated building but no development and testing equipment (only a hardness testing machine exists) at Industrial Development Centre on Composite Based Material for Sports Goods is the example of wasted investment. The project was to provide common facility services of fabrication, pressing, finishing, testing and manufacturing advisory service. If the project has been fully functional, a large number of medium and small players too would have come into composite segment and the exports would be multiple times than they are now.[39]

The sports sector adopted composite technology partially as the players established plants only for composite-based field hockey sticks and didn't opt for a large number of other composite-based products. In fact composite products constitute the largest segment of sports goods market globally as more than 120 sports items in the world (i.e. over 50% of the all sports products used in the world) are now made with composite material. These include composite field hockey sticks, roller hockey sticks, beach hockey sticks, cricket bats, baseball bat, tennis rackets, squash rackets, badminton rackets, paddle rackets, lacrosse shafts, skate boards, canoe paddle, rafting paddle and fishing rod, etc. Further to this, composite technology is being used globally in a number of products belonging to other sectors like storage tanks, walking sticks, airplane structure, racing car bodies and military equipment, etc. The local producers in Sialkot are hesitant to invest in development and production facilities for these composite-

[39] Mr. Ishaq Mughal, Project Incharge of Industrial Development Centre on Composite Based Material for Sports Goods

based items. If the industry expands its base towards these high value composite products, the size of the industry and the volume of exports can be multiplied only in a few years.[40]

2.9.5 Late adoption of thermo-bonded balls: Thermo-bonded technology has brought out such a football that doesn't involve a single stitch; rather the individual panels are pasted on the specially treated bladder. This technology was first introduced in the world in early 2000s. The 2002 FIFA World Cup was played with thermo-bonded footballs and that was a serious blow on Pakistan's football industry as it earlier had the monopoly in football supplied, especially on the occasion of global events like FIFA World Cup. Though the industry in Sialkot was affected due to 10-15% reduction in the orders of hand-stitched footballs, but still it didn't initiate to adopt the technology with the hope that thermo-bonded footballs would prove transitory and the stitched footballs would come again into the global events. Meanwhile, SMEDA planned to establish Sports Industry Development Centre (SIDC) in Sialkot to support the industry towards development, skilled labour provision, technology transfer and contract production, but the project was delayed. Again the FIFA World Cup 2008 was played with thermo-bonded balls and Pakistan was out of the event due to non-availability of technology. On the other hand China maintained its monopoly in thermo-bonded ball supplies from 2002 to 2010.

It was after 2010 when Pakistani producers took initiative and started importing and reverse-engineering the technology. This enabled the local producers to supply some smaller orders to international buyers. However, the major buyers like Adidas and Nike still remained away due to low capacity of development and production here. The Adidas order for the World Cup again went to China for 2014 FIFA World Cup. But it was fortunate for Pakistan that some problems at Chinese supplier's end forced Adidas to place some orders of World Cup footballs to Pakistan. It proved a turning point and Pakistan again came into mainstream and struggled to revive its position. In this way, the late adoption of technology kept the industry into recession for almost one decade and many football producers had to switch to other products like sportswear and protective gears, etc.

SIDC finally came on the scene with a total investment of Rs. 436 million in 2013 when the local industry had already made the required developments. SIDC is undoubtedly a great project, but the late entry has reduced its utility as currently just 15-20% of its development and production capacity is being utilized. It can still be useful for small and medium sized producers who cannot invest in thermo-bonded technology, but lack of marketing and persuasion at SIDC end seems to be a barrier.[41]

2.9.6 Non-adoption of certain technologies: The local industry didn't adopt technology for a number of such products that have huge demand in international market, e.g. fishing equipment (world's largest sports), rugby ball, golf sticks and high-tech motor sportswear and related protective gears, etc. [42]

[40] Expert Interviews + The Sports Goods Sector in Pakistan – Export Performance and Potential 2007 + Composite Based Sports Goods Industry -- History, Products, Scope and Future by Mr. Sohail Yaqub Mehr + http://www.newsonprojects.com/story.asp?news_code=7859

[41] Expert interviews

[42] Expert interviews

3. WORKFORCE CHARACTERISTICS

The key characteristics of the workforce are as under:

Number of Employees	Some 55,000 personnel are employed at around formal 1500 units around the city.[43]
Status of Employment	Permanent labour is hired only by large and progressive manufacturers. On the other hand, small, medium and many large units have the system of ad hoc and contractual labour. The recruitment of ad hoc labour and prevalence of contract-based labour system prohibit the factory owners to develop a permanent workforce and this factor hurdles the systematic skills development.[44]
Gender	The workforce employed at sports goods industry is highly dominated by males, while female workers get engaged only in football stitching centers or with large and progressive units. The exploratory interviews revealed that females make roughly 2-3% of overall workforce employed in the industry. This was backed by the establishment survey which reiterated that women workers constitute only 5% of the total workforce and are concentrated in few job tasks. The conservative environment in the area does not encourage females to work in factories as the work environment there is not supportive for them. The employers too hesitate to hire women due to the risk of any mishap with them and due to certain limitations attached with women, e.g. they can't handle heavy tasks and can't work for extended hours or in night shift when a large order is to be completed in short time. However, the large and progressive units in the area have established separate departments for female workers where they perform various jobs like hand stitching, machine stitching, screen printing, assembling, inspection and packing, etc.[45]
Employees Turnover Rate	As the majority of workforce is on ad-hoc or contractual basis, the employers have less direct control over them. Hence, the switching of companies by the employees is a common practice. However, large and progressive companies have proper systems, while good salaries and benefits results in low turnover with them.[46]
Working Hours	The companies with ad hoc or contractual system have no specific timings. When an order is received, they have to work day and night. As the employees are hired on per-piece wage basis, they may work for as long a time as they wish or as the contractor or employer wants from them.

"When we need extra production, we don't hire extra labour, rather our existing labour works over time for some days to meet the production target. Female workers however do not stay for over time and we face much difficulty."Muhammad Shoaib, Production Manager Gold Panel Ltd.

[43] Worked out on the basis of leads gathered from Expert Interviews
[44] Expert interviews
[45] Expert interviews
[46] Expert interviews

	On the other hand, the large progressive companies have 9 to 5 working hours with one hour break. Some companies run two shifts when required.[47]
Average wages	Discussing with sector experts led to the following detailed information about wages in the industry according to the job title. The average wages for different designations/tasks are as under: **Table 5: Average Wages by Designation** **Designation/Task** — **Av. monthly wages (Rs.)** Pattern Maker — 40,000 Supervisor/Foreman — 30,000 Bat Scrub Master/Karigar — 25,000 Gloves Stitcher/Karigar — 30,000 Football hand stitcher — 10,000 Machine Operator (Saw machine, bladder machine, sheet cutting machine, etc.) — 12,000 Lamination worker — 15,000 Sorting and Matching Worker — 15,000 Gloves trimmer — 12,000 Packing workers — 12,000 Helper — 7,000 Screen Printer — 15,000 The survey of establishments noted the maximum and minimum salary ranges of the manager/supervisory level staff and the worker level staff. For establishments which paid per unit rates to workers, the average was calculated.
Qualification and training Status	The master & helper system is the norm of sports goods manufacturing industry in Pakistan. This system is the one where a skilled worker (master or *karigar*) keeps some unskilled workers or helpers for the purpose of getting help from them in labourious tasks and to train them for future. The helpers are mostly teenagers and are given nominal salaries ranging from Rs. 5000 to 8000 per month (vis-à-vis Rs. 15000 to 30000 salary of master/*karigar*). The helper is given training on a very low pace and it can take many years to enable him to achieve mastery in the job. Almost entire skilled work-force presently on floor has come from the Master-helper channel and they have low literacy (primary or maximum middle) and are without any formal training at some institute.[48] The prevalence of qualified skilled workers in sports goods industry is very low. Hardly 2000 personnel among the overall 55000 permanent employees would have obtained some technical training at some institute.[49]

[47] Expert interviews
[48] Expert interviews
[49] Expert interviews

4. SKILLS ANALYSIS

4.1 Need for Technical Training

Better access to quality employment for the citizens should be the prime aim of any government. Unless effective measures are taken to build the human capital of new entrants into the labour market as well as existing participants in this market, the society is bound to remain burdened with a low human capital.

In fact, the ongoing demographic transition in Punjab is increasing the share of young adults in the population. Approximately two-thirds of Punjab's population (i.e. 66 million) today is below the age of 30 years. Within this group, the size of population between the ages of 15 to 29 is estimated at about 30 million. The high number of young adults seeking productive employment requires Punjab to increase its rate of job creation to avoid further rise in unemployment rate.

The youth bulge in Punjab is resulting in the entrance of more than 1 million new workers in job market every year. At the current rates of labour force participation, this implies the need of at least 1 million new employment opportunities every year till 2020 to keep unemployment at its current level. The matter of concern is that the rate of growth of employment in the province has been lower than the rate of growth of labour force in the recent past. Therefore, the increase in rate of employment creation is an important challenge.

The demographic composition of Punjab provides an opportunity for huge economic growth provided these young adults are connected to productive opportunities. This also provides an opportunity for women to participate more actively in the labour force and boost economic growth. On the contrary, the failure to exploit these opportunities can have severe social, economic and political consequences.

The Labour Force Survey indicates that only 12% of the present working-age population (15-64 years) in Punjab has acquired skills training. This is resulting in low skills level of the workforce and hampering the access to quality jobs. Thus the need really exists to expand the fabric of technical training by designing such interventions that increase the rate of human capital accumulation in work force, especially for those individuals who have low education attainment and poor quality of learning.

Punjab Government's Skills Development Sector Plan targets to train 2 million workers by 2018. The plan not only aims at increasing the supply of skilled labour but also takes the challenge of improving the economic and non-economic returns by providing better earning through quality jobs to the trained personnel and supplying quality workforce to the job market for utmost productivity. [50]

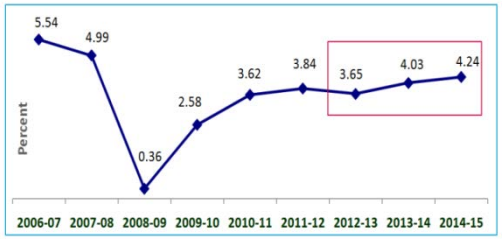
[50] *Source: Punjab Skills Development Plan 2018: Government of Punjab*

Pakistan's economic revival would need better skills provision in future

Pakistan is a developing country and lies among the Next Eleven, the 11 countries that, along with the BRICs (Brazil, Russia, India, China and South Africa), have a potential to become the world's large economies in 21st century.

The economy of Pakistan experienced recession during 2008-09 to 2012-13 based on acute energy crises, terrorism, internal political disputes, low level of FDIs and squeezed foreign exchange reserves. However, the country is now back on track and the economic growth is gaining strength as a result of elimination of terrorism, control on unrest in the economic hub of Karachi, steady implementation of structural reforms by the government and other factors like steep increase in forex reserves, a favorable slump in international oil prices and resultant decrease in import bills and decline in inflation[51]. In May 2015, the State Bank of Pakistan (SBP) cut the benchmark interest rate to its lowest level in 42 years. Also the benchmark KSE-100 stock index has advanced about 16% during 2014-15, featuring it among the world's top 10 performers.[52]Most recently in July 2015, the settlement of a major political dispute pertaining to the alleged election rigging issue is also likely to further improve the country situation.

Figure 6: Pakistan's GDP Growth Rate



Source: Economic Survey of Pakistan 2014-15: Ministry of Finance

The country is entering into new horizons of progress with the launch of mega projects funded by China. The Chinese President visited Pakistan in April 2015 and inaugurated infrastructure and energy projects worth US$ 46 billion that equals 20% of Pakistan's GDP.[53] The economists are terming this deal a game changer that would give a historic boost to Pakistan's economic development.

In mid-2015, numerous reputed media outlets like Bloomberg, Forbes and the Economist etc. reported that with a fast-improving security, Pakistan has the potential to become a global turnaround success story. The present rightfulness of Pakistan's economy can be measured by the Economist's report that states that Pakistan's economy is doing even better than the economies of Canada and the USA. Similarly, the recent headlines of many Western newspapers gloss over Pakistan's progress on the security front, the increased political stability, and incremental progress on the economic front. Besides, in June 20015 Moody's Investors Service upgraded Pakistan's sovereign credit ratings for the first time since 2008. Also Standard & Poor's has raised Pakistan's credit rating outlook to positive from stable.[54]

The current improved economic, political and security situation will expectedly boost the economic activities. And this would require more skilled people to match the boom. This situation presents a unique opportunity for Pakistan to achieve sustainable economic growth through efficient use of its manpower in future.[55]

[51] Pakistan Development Update – April 2015:The World Bank
[52] http://www.thenews.com.pk/Todays-News-13-39025-Pak-economy-doing-betterthan-US-Canada-economies
[53] http://money.cnn.com/2015/04/20/news/economy/pakistan-china-aid-infrastucture/index.html
[54] http://www.thenews.com.pk/Todays-News-13-39025-Pak-economy-doing-betterthan-US-Canada-economies
[55] IMF (Daily Times July 25, 2015 -- 'Pakistan's economy is improving, says IMF official'

4.2 Challenges to Skills Development Initiatives

International experience suggests that despite putting in substantial programme costs, the positive benefits of skill development and vocational training programs are not always guaranteed.[56] We see many skill development initiatives that have not brought out the desired results due to reasons such as lack of need assessment, poor course design, low linkage between academia and industry and deficient marketing to attract the students as per capacity, etc.

A skills development program is believed to be successful if it produces net gains in terms of economic and non-economic outcomes. The success of a program depends on the timely provision of funds, the prevalent economic growth environment as well as features of program design, including the following:

- Adequate supply of quality training opportunities that are aligned with labour demand;
- Providing low cost access to these opportunities
- Maximizing the return to these opportunities through complementary interventions that improve access to jobs and markets.

The possible challenges faced by any skills development initiative in Pakistan are as under:

- The need for expensive machinery, equipment and materials and respective upgradation with time make a TVET institute an expensive project to establish and run.
- Achieving admission rate to meet the capacity is believed to be the most difficult aspect due to low inclination of people towards technical education and training, especially those living in urban areas
- Blue collar jobs are less liked by the people, especially those living in cities. They want white collar jobs and tend to get general education (F.A./B.A.) or professional education (I.Com/B.Com/ICS/Computer diploma, etc.) for career progression.
- Low salaries and facilities for blue collar jobs at small and medium-sized factories (especially sports goods industry) make the youngsters less interested in getting technical training and get these jobs. The youngsters tend to get informal training in such fields that have the opportunity of self-employment, e.g. telecom shop, mobile phone repairing, driving, auto mechanic, electrician, fabrication, etc.
- The people belonging to the rural areas and poor communities are relatively more inclined towards technical training as they can't afford higher education and want their sons to become earners soon. But such people can't afford fees of technical institutes and expect no fee or even stipend.
- A general dearth of qualified and experienced instructors caused by brain drain is a barrier towards the provision of quality education and training.
- Recruitment of ad hoc labour and prevalence of contract-based labour system at factories (especially sports goods industry) prohibit the factory owners from developing a constant manpower. The absence of permanent staff causes low interest of factory owners in formal technical training of manpower.

[56] Punjab Skills Development Plan 2018: Government of Punjab (Further references: World Bank 2012, Orazio Attanasio and others 2011, David Card and others 2011, Natalie Chun and others 2012, Joan Hicks and others 2011, and Fares and Puerto 2009).

5. SKILLS SUPPLY SECTOR

5.1 Footprints of skills suppliers in Sialkot and Narowal Districts

Technical and vocational education and training (TVET) is handled in Sialkot and Narowal districts by various bodies like Technical Education and Vocational Training Authority (TEVTA), Pakistan Vocational Training Council (PVTC), Private institutes affiliated with Punjab Board of Technical Education (PBTE), Leather Products Development Institute (LPDI) by Pakistan Gloves Manufacturers and Exporters Association (PGMEA), (TUSDEC, PITAC, APGMA and the private sector institutions. These bodies collectively run 36 training institutes in these districts.

Table 6: Training Service Providers in Sialkot and Narowal Districts

	College of Technology	TTC	VTI	ATC	Service and Training Centre	Total
TEVTA	1	5	6	1	1	14
PVTC	-	-	5	0	-	5
PBTE affiliated private institutes	6	7	-	-	-	13
Leather Products Development Institute (LDPI)	-	-	-	-	1	1
SMEDA SIDC	-	1	-	-	1	2
TUSDEC NIDA	-	1	-	-	-	1
Total	7	14	11	1	3	36

Source: Info provided by the respective bodies + websites

Punjab Skills Development Fund (PSDF) Punjab Skills Development Fund (PSDF) is a not-for-profit company set up under the Companies Ordinance 1984 by the Government of the Punjab in collaboration with Department for International Development UK. Established in 2010, it is a UK£50 million training fund set up with the objective of financing 135,000 individuals by stimulating a market for training services.[57]

Technical Education & Vocational Training Authority (TEVTA) is a provincial government body that runs Government Technical Colleges (GCTs), Government Technical Training Centres (GTTCs), Apprenticeship Training Centres (ATCs), Government Technical Training Institutes (GTTIs), Government Vocational Training Institutes (GVTIs) and Service Centres in Punjab. TEVTA network in Sialkot and Narowal districts consists of 14 centres. These include one GCT for men, 6 GVTIs for women, 5 GTTCs for men, one GTTC for women and one Apprentices Training Centre (ATC) for men. The authority also runs one development centre for surgical goods sector in Sialkot, i.e. Metal Industries Development Centre (MIDC). These institutes offer fee-based regular courses as well as stipend-based Industry Demand

[57] PSDF Website

Driven (IDD) Courses*. The establishment of two new GCTs each for male and female is underway in Narowal on 59 and 40 kanal area, respectively.[58]

*These are 2nd shift short courses of 3 to 6 month duration introduced by TEVTA in its campuses.

Punjab Vocational Training Council (PVTC) is an autonomous corporate body established by the Punjab Government. Its mission is to enhance employability for disadvantaged youth by imparting demand driven skill training through Muslim charity (Zakat) and private sector participation. The council runs 170 stipend-based vocational training institutes (VTIs) in Punjab. Among them, 3 VTIs for men and 2 for women exist in Sialkot and Narowal districts.[59]

Private sector technical training institutes in Sialkot and Narowal districts are around 13 in number and offer TVET courses under affiliation with PBTE. These include technical colleges and TTCs. The courses range from 3 months certificate courses to 3-years diplomas.

Sports Industry Development Centre (SIDC) in Sialkot is a joint initiative of Ministry of Industries (MoI), Small and Medium Enterprise Development Authority (SMEDA) and Sialkot Chamber of Commerce and Industry (SCCI). The aim of the centre is to help sports goods sector to adopt new technology of thermo-bonded mechanized football by providing training, common manufacturing facility, mold development service and technical advisory service. The space for a common facility of composite-based products to be built in future is also reserved within SIDC premises. The training aspect of SIDC includes the launch of short courses related to sports industry.

Leather Products Development Institute (LPDI) was established with financial and technical assistance of German Federal Enterprise for International Cooperation (GIZ) and United Nations Industrial Development Organization (UNIDO). Pakistan Gloves Manufacturers and Exporters Association (PGMEA) is responsible for supervision and management of this institute, while the curricula have been developed by National Vocational and Technical Training Commission (NAVTTC). LPDI offers 9 courses related to leather garments and sports-wear sectors.[60]

Technology Upgradation and Skills Development Company (TUSDEC) is a wholly owned subsidiary of Pakistan Industrial Development Corporation Ltd. (PIDC) with the aim of technology upgradation in the key industrial sectors of the country. Among various programs and projects of technology upgradation, CAD/CAM training centres are important interventions of TUSDEC. The body runs 5 advanced CAD/CAM training institutes in Pakistan. One of these centres exists in Sialkot.[61]

[58] TEVTA District Office Sialkot
[59] Punjab Vocational Training Council (http://pvtc.gop.pk/Corporate/Institutes%20Network/North/NarowalVTIs.aspx)
[60] LPDI website
[61] http://tusdec.org.pk/nida/

5.2 Courses Offered by skills suppliers in Sialkot and Narowal Districts

5.2.1 Courses offered by TEVTA institutes: Out of some 40 courses offered by TEVTA institutes in Sialkot and Narowal districts, only one course is directly related while 4-5 are in general or indirectly related with sports goods sector. The only trade with exclusive relationship is Industrial Stitching, while the trades with indirect or general relationship with sports good industry are Electrical, Mechanical, Matric Vocational, Fabric Printing, Computer Applications and Spoken English. [62]The overall list of courses with respective relevance is as under:

Table 7: Courses offered by TEVTA institutes in Sialkot and Narowal Districts

Courses Offered	Related – Exclusive or in-general			
	Inflatable Balls	Protective Gears	Composite Based Products	Wooden items
Paid Regular Courses				
36-Months DAE				
DAE Auto and Diesel				
DAE Civil				
DAE Electrical	√	√	√	√
DAE Electronics				
DAE Mechanical	√	√	√	√
24-Months Matric Vocational				
Matric Vocational				
12-Months Courses				
Dress Making				
Electronics Applications (Radio and TV)				
Fashion Designing				
Auto and Farm Machinery Repair				
Auto Mechanic				
Electrical	√	√	√	√
Machine Shop				
Motor Winding				
Tailoring				
Welding				
Wood Work				√
Auto CAD				
Welder				
6-Months Courses				
Auto Electrician				

[62] TEVTA Sialkot office

Civil Surveyor				
Electrical Wiring Technician				
Electrician				
Plumber				
Auto and Farm Machinery				
Textile Designing				
Beautician				
Industrial Stitching	√	√		
Computer Applications (CCA)	√	√	√	√
Domestic Tailoring				
Electrical and Mechanical	√	√	√	√
Fabric Printing		√		
Handicrafts				
HVACR				
Machine Embroidery				
Tailoring				
Tractor Operator				
Turner				
Wiremen				
3-Months Courses				
Beautician				
Domestic Tailoring				
Painting				
Computer Applications (CCA)	√	√	√	√
Cooking and Baking				
Fabric Printing		√		
Machine Embroidery				
Tailoring				
Spoken English	√	√	√	√
Stipend-based Industry Demand Driven (IDD) Courses				
6-Months Courses				
Web Designing				
Industrial Stitching	√	√		
Beautician				
Computer Applications (CCA)	√	√	√	√
Electrician	√	√	√	√
Motor Winding				
Motorcycle Mechanic				
HVACR				
3-Months Courses				
Cooking				

Beautician				
Spoken English				
OJT-based courses at Apprentices Training Centre (ATC)*				
Industrial Stitching Machine Operator (6+6 months)	√	√		
Electrician (12+12 months)	√	√	√	√
Computer Applications (6+6 months)	√	√	√	√
Machinist (12+12 months)				
Welder (12+12 months)				
Surgical Instruments Machinist (12+12 months)				
Bench Fitter (12+12 months)				

*ATC students pass half of the program duration at the institute and the rest half at some business/industry for on-the-job training. The students are given a stipend of Rs. 6500 per month (50% of min. wages declared by the Govt.).

5.2.2 Courses offered by PVTC institutes: PVTC runs 3 VTIs for men and 2 for women in Sialkot and Narowal districts. Among these institutes, only VTI for male Sialkot offers 7 such courses that are directly related to sports industry.

VTI Sialkot exists in Small Industrial Estate (SIE) that is the heart of industry in the city. SIE comprise of 242 industrial units including 56 sports goods manufacturers. These units are medium-to-large in size in perspective of Sialkot. With 20 trained instructors, VTI has been successfully providing skilled workforce to sports goods industry since 2008. It has the instructor-student ratio of 1:15, while the institute's capacity is over-utilized. The sports industry related courses offered at VTI Sialkot are:

Table 8: Technical Courses at VTI Sialkot

Course Name	Duration	Stipend (Rs. Per month)
Computer Pattern Designing	6+2 months	500
Leather Garment Stitching	6+2 months	500
Screen Printing and Computer Designing	6+2 months	500
Web and Graphics Designing	6+2 months	500
Import-Export Procedure and Documentation	6+2 months	500
Auto CAD Operator	6+2 months	500
Computerized Application and Office Professional	6+2 months	500

The duration of each of these courses is 8 months including 2 months OJT training at some related industrial units. The capacity of each courses in two shifts range from 40 to 65 students, while the enrolments often surpass the capacity due to good repute of the institute and high demand of its courses in the industry. The second shift offers the repeat courses under the Chief Minister's Industry Demand Driven (IDD) Courses Program. Aggregately, more than 800 trained males are produced by the

institute each year and almost 60% of these go for the job, while the rest 40% adopt different options like further education, self-employment and going abroad. This suggests that the institute provides almost 500 trained personnel to sports industry each year. Most recently, VTI has started a remote campus for female at Ugoki near Sialkot offering Leather Garments Stitching under IDD Program with the aim to empower women workers[63].

5.2.3 Courses offered by TUSDEC: NIDA Sialkot is one of the five operational CAD/CAM centres established by TUSDEC in order to facilitate the local Surgical, Leather and Sports industries by inducing modern tools and techniques to design, develop and market their products. NIDA Sialkot is imparting trainings in modern Computer Aided Design and Computer Aided Manufacturing (CAD/CAM). NIDA Sialkot offers 13 courses that are quite related to sports industry.[64] The detail of these courses is as under:

Table 9: Technical and Professional Courses at NIDA Sialkot

Course Name	Duration	No. of lectures	Fee for entire course (Rs.)
Computer Basics	4 weeks	20	5,000
Computer Hardware and Troubleshooting	3 weeks	16	5,900
Import and Export Documentation	4 weeks	25	6,000
Web Designing	3 weeks	14	4,900
Dynamic Website Development (Dreamweaver – ASP or PHP)	8 weeks	40	8,000
Design and Implementation of Accounting Systems	4 weeks	20	6,000
2D and 3D Drafting using AutoCAD	4 weeks	24	6,000
3D Studio Max – 3D Modeling and Rendering	6 weeks	30	11,900
3D Studio Max – Animation and Design	6 weeks	30	6,000
Graphic and Vector Design (CorelDraw, Adobe Photoshop, Illustrator)	4 weeks	20	6,000
Advance Local Area Network Design / MCSE	7weeks	35	10,000
Advanced Wide Area Network Design / CCNA	6 weeks	30	10,000

5.2.4 Courses offered by LPDI: Established with the financial and technical assistance of UNIDO in 2000, LDPI is being managed by PGMEA that is a representative body of leather gloves producers in Pakistan. This participatory approach has helped in aligning the institute with the industry needs, while the institute gets assistance of the industry in admissions, OJT and placement. Majority of the passouts are employed in Sialkot based sports gloves and garments units, while some go for self-employment initiatives like vendors/makers and freelance service providers. The institute exists in a purpose built campus possessed with vast rooms and state of the art labs and shops. It employs latest equipment, innovative leather products technology, updated curricula and experienced faculty. LPDI offers a

[63] *Expert Interviews + PVTC website*
[64] NIDA social media account

number of short courses that are directed related to sports gloves, protective gears and sportswear industry.[65] These courses are:

Table 10: Technical and Professional Courses at LPDI Sialkot

Course Name	Duration	Stipend (Rs. Per month)
CAD/CAM Computerized Pattern Designing	6 months	2,200
Leather Gloves Pattern Making	6 months	2,200
Leather Garments Pattern Making	6 months	2,200
Leather Gloves Stitching	6 months	2,200
Leather Garments Stitching	6 months	2,200
Sportswear Stitching	6 months	2,200
Production Planning and Control	6 months	2,200
Fashion Designing	6 months	2,200
Merchandising Management Techniques	6 months	2,200

5.2.5 Courses offered by SIDC: The training aspect of SIDC includes the launch of a number of short courses related to sports industry. It has recently introduced a basic course of AutoCAD, while the future plans include the introduction of a number of sports goods related courses like 3 Year Diploma in Rubber Technology, 12 month course of Rubber Technologist and 3 months courses in Thermo-Bonded Football Technology, Football Lab Operations, Garments Stitching and Boiler Operations, etc.

5.2.6 Courses offered by Private Technical Institutes: Some 13 private sector technical training institutes in Sialkot and Narowal districts offer TVET courses under affiliation with PBTE. These include the following:

Table 11: Private Technical Institutes Affiliated with PTBE

Institute Name	Location
Sialkot College of Engineering and Technology	Khadim Ali Road, Sialkot
Standard Polytechnic Institute	Khadim Ali Road, Sialkot
Trigon College of Technology	Katchery Road, Sialkot
Apexian College of Technology	Defence Road, Sialkot
Qureshi Technical Training Centre	Jail Road, Sialkot
Sialkot Technical Institute	Gohadpur Road, Sialkot
Kasib Polytechnic Institute	Jinnah Chowk, Daska
Royal College of Technology Daska	Circular Road, Daska
Royal College of Technology Sambrial	G.T. Road, Sambrial
Sultan Engineering and Computer Institute	Model Town, Pasrur
City College of Technology	Pasrur Road, Narowal
Narowal Institute of Technology	Circular Road, Narowal
Standard Polytechnic Institute	Shakargarh Road, Zafarwal

65

Private technical institutes offer courses of various durations ranging from 3 months short courses to 3 year diploma. The 3-years diploma is offered in Civil and Electrical trades, while short courses of 3 to 6 months include various trades like Civil Surveyor, Quantity Surveyor, AutoCAD, Safety Inspection, 3D Max, Electrician, Auto Electrician, Auto Servicing, Civil Draftsman, Refrigeration and Air-conditioning, Welder, etc. The exams for these courses are conducted and certificates issued by PTBE. These institutes can't offer any course other than the ones approved by PTBE as the acceptance of such private courses would be low without the certificate of any testing authority like PTBE.

None of the courses offered by private technical institutes are directly related to sports goods industry; however some trade courses offered like Electrician and 3D Max can have some indirect reference to the skills needed.

Table 12: Technical Courses at Private Institutes

Course Name	Duration
DAE Civil (Diploma)	3 years
DAE Electrical (Diploma)	3 years
AutoCAD	6 months
Civil Surveyor	6 months
Quantity Surveyor	6 months
Safety Inspection	6 months
Electrician	6 months
Auto Electrician	6 months
Auto Mechanic	6 months
Auto Servicing	6 months
Civil Draftsman	6 months
Refrigeration and Air-conditioning	6 months
Welder	6 months
3D Max Professional	3 months
Other courses	3-6 months

6. ATTRIBUTES OF TVET INSTITUTES IN SIALKOT

6.1 Sports goods industry related courses

Out of almost 85 courses taught in the technical training institutes of Sialkot and Narowal districts, some 15 (i.e. 18%) are directly related to sports goods industry. The duration of these courses ranges from 4 weeks to 6 months, however high dominance exists for 6 month courses. These courses are generating almost 800 skilled personnel per annum for the sports goods industry of Sialkot[66]. However, the number of passouts actually joining sports goods industry are hardly 500 per annum[67], while the rest tend to adopt other options like further education, jobs in other sectors like textile, leather garments and surgical instruments, etc., self-employment or going abroad.

Table 13: TVET Institutes and Respective Sports Industry Related Courses

Institute	Overall number of courses offered	Sports Industry Related			
		No. of courses directly related	Names of courses	Duration	Passouts per annum (Appx.)
TEVTA (GCT, TTCs, GVTIs and ATC)	40	1	Industrial Stitching at two GVTIs	6 months	60
			Industrial Stitching Machine Operator at ATC (OJT-based)	6+6 months*	15
Sub-total					75
PVTC VTI Small Industrial Estate Sialkot	9	3	Screen Printing and Computer Designing	6+2 months	100
			Computerized Pattern Designing	6+2 months	65
			Import-Export Procedure and Documentation	6+2 months	100
Sub-total					265
TUSDEC NIDA Kashmir Road	12	1	Import and Export Documentation	4 weeks	100
Sub-total					100
LPDI Kashmir Road	9	9	CAD/CAM Computerized Pattern Designing	6 months	40
			Leather Gloves Pattern Making	6 months	40
			Leather Garments Pattern Making	6 months	40
			Leather Gloves Stitching	6 months	40
			Leather Garments Stitching	6 months	40
			Sportswear Stitching	6 months	40
			Production Planning and Control	6 months	40
			Fashion Designing	6 months	40

[66] Worked out on the basis of information shared by TVET bodies + Literature & websites of TVET institutes
[67] Estimate based on expert interviews

			Merchandising Management Techniques	6 months	40
Sub-total					360
Private technical institutes	15	0	-	-	0
Sub-total					0
Grand total	85	15	-	-	800

* 6-month classroom training and 6 months internship/OJT training

** 6-month classroom training and 2 months internship/OJT training

6.2 OJT system:

The concept of apprenticeship, internship or on-the-job training (OJT) is to provide opportunity to the trainees to work and learn in the real work environment. Some technical training bodies make it mandatory for all trainees to complete their OJT for grooming of skills and to prepare them to accomplish the job responsibilities effectively. On the other hand, OJT is not a part of the training system of some other technical training bodies.

6.2.1 OJT system at TEVTA Institutes in Sialkot: OJT is not the part of training system at TEVTA's GCT, TTCs and GVTIs. However, TEVTA ATC Sialkot necessitates 6 months apprenticeship of each student at some industry present on ATC panel.

6.2.1.1 OJT system at ATC Sialkot: OJT and placement activities for ATC students are managed by Regional Directorate of Apprentices Training (RDAT). In Sialkot, the RDAT office exists within the ATC campus. Hence a close coordination exists between RDAT staff, the ATC management and the students. Under the Apprentices Act, every registered business with more than 50 employees and having at least 5 employees in the apprentice-able trade is under obligation to employ and train apprentices if given the task by respective body. Based on the annual output of almost 100 apprentices at ATC Sialkot, RDAT has put some specific factories on its panel that are bound to accept and train apprentices. A monthly stipend equivalent to 50% of minimum wages is also paid to the trainees during the course of apprenticeship. Presently, around 50 manufacturers in Sialkot belonging to different sectors are on RDAT panel including around 25 sports goods units. The ATC apprentices sent to sports goods units belong to the trades of Industrial Stitching Machine Operator, Electrician and Computer Applications.

Table 14: Sports Goods Unit on RDAT Panel

Sports Goods Units on RDAT Panel	
Ali Trading and Co. Ltd. (Alitra)	Kampala Industries Ltd.
Anwar Khawaja Industries Ltd.	Khalid Overseas Ltd.
Awan Sports Ltd.	Leather Field Ltd. (3 units)
Bonzer Sports Ltd.	Leather Ware Ltd.
Boxing Techniques	Lofty Sports Ltd.
Capital Sports Ltd.	Moltex Sporting Goods Ltd.

Cobija Industries	Padana Gloves Ltd.
Fircos Industries Ltd.	Peena Overseas Ltd.
First American Corporation Ltd.	Shafy Sports Ltd.
Forward Sports Ltd.	Taj Mahal Sports Ltd.
Fox and Associate	Talon Sports Ltd.
Glaring Sports Ltd.	Towne Brothers Ltd.
Grays of Cambridge Ltd.	Vital Ltd., etc.

6.2.2 OJT system at VTI Sialkot: VTI Sialkot seems to have most effective OJT system among the TVET providers in Sialkot. A dedicated OJT & Placement Officer has been appointed for this purpose. The activities of the officer regarding OJT are as under:

- Coordination with the Principal and the local Board of Management for devising effective strategy for OJT of trainees and maintain updated record.
- Career counseling with trainees
- Identification such employers that are willing to allow OJT of students
- Building and maintaining PR with potential employers
- Active pursuit with potential employer for motivating them to allow the trainees for OJT
- Arrangement for the OJT of trainees with potential employers and maintain record
- Getting feedback from employers regarding the performance of OJT trainees at work and then motivating them for improved performance during OJT period for ensure employment for themselves and other students of VTI

VTI has a number of sports goods units on its panel that allow voluntary OJT. The prominent among them are Alberta, Anwar Khawaja, Awan, Capital, Gold Panel, Grays, K.M. Ashraf and Talon, etc. The VTI trainees sent to these units for OJT belong to the trades of Computerized Pattern Designing, Leather Garments Stitching, Screen Printing and Import-Export Procedure and Documentation.

The trainees of VTI are well accepted by the industry due to their good knowledge about the trade and no binding about salary/stipend. The OJT to job conversion of VTI students is more than 60%. These trainees are hired by the same OJT providers during or soon after the OJT period.

Contrary to the case of ATC trainees, the stipend for VTI's OJT trainees is not fixed; rather it is on the discretion of the OJT provider. Some of them pay good stipend upto Rs. 10000 per month while some offer mere a token salary for pocket money and free lunch and tea, etc.

Table 15: Sports Goods Units at VTI Panel

Sports Goods Units on VTI Panel	
Alberta Sports Ltd.	J.J. Martial Arts Ltd.
Anwar Khawaja Industries Ltd.	K.M. Ashraf Ltd.
Awan Sports Ltd.	Klaro Sports
Capital Sports Ltd.	Nizam Sons
Gold Panel	Talon Sports Ltd.
Grays of Cambridge Ltd.	Teknic, etc.

6.3 Placement system

A major aspect of TVET programs is the placement of passouts within a shortest period after passing out. Almost all TVET bodies working in Sialkot have some placement related activity.

6.3.1 Placement system at TEVTA institutes: TEVTA has recently established a Placement Department to ensure better placement of its passouts. The placement officers at provincial and zonal level undertake various placement activities like seeking international contracts for skilled labour provision to overseas organizations, especially in Middle East, organizing job fairs and exhibitions and devising strategies to enable the TEVTA district offices to make better placement of individual passouts. Placement officers have also been appointed on district and institute level.[68]

6.3.2 Placement system at ATC Sialkot: When ATC students are sent by RDAT for apprenticeship to respective factories, this in fact is a step towards final employment of the students. In majority of cases, the apprenticeship providers themselves offer job to the trainees during the period of their apprenticeship. If that is not the case, the apprentices themselves are able to get good jobs elsewhere or adopt self-employment as they would have got good experience during apprenticeship of 6 months or so.[69]

6.3.3 Placement system at VTI Sialkot: VTI Sialkot has an effective placement system in place. A dedicated OJT and Placement Officer undertakes activities for career counseling and placement of passouts. The respective activities are as under:

- Coordination with the Principal and the local Board of Management for devising effective strategy for placement of passouts and maintain updated record
- Identification of potential employers to explore opportunities for placement of passouts
- Active pursuit with potential employer for motivating them to employ the VTI passouts
- Receiving enquiries from employers regarding demand of technical personnel in their companies and following up with that
- Assessment of existing trades with respect to the job opportunities in the area and recommendation for replacement or start of new trades

[68] Expert interviews
[69] Expert Interviews

6.4 Course Fees and Stipend System

Majority of courses offered by TVET institutes in Sialkot and Narowal are stipend-based, while some courses have specific monthly fee. A nominal fee of Rs. 200 per month is charged for regular morning courses at TEVTA GCT, GTTCs and GVTIs, while some self-financed courses like Fashion Designing and Beautician have higher fee of Rs. 600-1000 per month. On the other hand, the students of Industry Demand Driven (IDD) courses at these institutes are given a stipend of Rs. 500 per month.

"We feel that even a fee of Rs. 500 per month is hard for students to pay. That's why we are facing difficulty in attracting students. Hence, we are planning to make arrangements of stipend and other facilities to attract more and more students." Muhammad Sarwar Hanif, Project Director SIDC

AT PVTC institutes, both regular and IDD courses offer a monthly stipend of Rs. 500. In fact, the institute is funded with Rs. 2500 per month for each student by PVTC. From this amount, Rs. 2000 is spent by the institute for faculty salaries, administration and overheads, etc. while Rs. 500 is given to the student as stipend. Both TEVTA and PVTC pay the stipend amount to the students aggregately at the course-end.[70]

"A master would first engage his helper in petty jobs like machine oiling, floor cleaning and material shifting, etc. for a year, then he will start involving him in actual work. The passouts of our institutes learn on fast track and they reach to a specific leaning point in 3-4 months where the traditional helper will reach in 3 years."Professor Abdul Hameed, Principal Sialkot College of Technology

All the courses at TEVTA's Apprentices Training Centre (ATC) are stipend based. Each apprentice is given a monthly stipend equal to 50% of minimum wage announced by the government. For instance, the current minimum monthly wage announced in Budget 2015-16 is Rs. 13000, while the present monthly stipend for each student is Rs. 7500. The apprentice even goes on receiving the stipend while he is spending his internship at some industry.[71]

LPDI offers a scholarship/stipend of Rs. 2200 per month[72], while TUSDEC NIDA charges fee of Rs. 5000 to 8000 per month. The present fee charged by SIDC is Rs. 500 per month, while the institute is planning to offer stipend and other attractions for students in future. The fee charged by private technical institutes affiliated with PBTE varies from Rs. 2000 to 3000 per month. As Civil trade is in high demand because of better prospects abroad and its training involves expensive equipment, the fee charged for it the highest, i.e. up to Rs. 3000 per month, while other trades have relatively lower fees

[70] Expert interviews
[71] Expert interviews
[72] https://www.facebook.com/LPDI1/photos_stream?ref=page_internal

Table16: Course Fees or Stipend at TVET Institutes

Institute/Course Category	Fee (Rs. Per month)	Stipend (Rs. Per month)
TEVTA Regular	200	-
TEVTA Self-Financed	600-1000	
TEVTA IDD	-	500
TEVTA ATC	-	6,500
PVTC regular	-	500
PVTC IDD	-	500
LPDI		2,200
TUSDEC NIDA	5,000-12,000	-
SIDC	500	-
Private institutes	2,000-3,000	-

7. NEED OF QUALIFIED SKILLED WORKERS

7.1 Preference towards qualified skilled workers

Only large and progressive sports goods producers have shown their inclination towards skilled workers qualified from TVET institutes, while medium and small sized companies still prefer the conventional master-helper system.

Master-helper system is the one where a skilled worker (master or *karigar*) keeps some unskilled workers or helpers for the purpose of getting help from them in labourious tasks and to train them for future. The helpers are mostly teenagers and are given nominal salaries ranging from Rs. 5000 to 8000 per month (vis-à-vis Rs. 15000 to 30000 salary of master/*karigar*). The helper is given training at a very low pace and it can take many years to enable him to get mastery in the job. On the other hand, a skilled worker coming from a TVET institute learns fast and goes up the ladder in a short time as he has sound knowledge about processes.

The establishment survey gathered that only 15% of sports goods manufacturers in Sialkot would be willing to hire skilled workers trained by TVET institutes. These constitute mere 5% of overall number of sports goods units and one-third of total number of large units. These companies have a multi-level employee hierarchy consisting of higher management, middle management, supervisors and foremen, etc. and possess a large employee base (e.g. 300 or more direct employees). The majority of the employees are on the company's direct payroll and not in the contractor's pool. Many of these companies have such managers and supervisors who themselves came from TVET institute and have gradually developed their designations. All of these firms are export oriented and have high quality benchmarks.

On the other hand, the companies that do not prefer qualified skilled workers are small to medium sized or even large firm. These generally rely on contractor system where a production department or function is handed over to a contractor who arranges the labour at his own and charges the company on per-piece basis. Some small firms directly recruit the staff but the wages are still on per-piece basis.

7.2 Reasons for Preference of Qualified Skilled Workers

Large sports goods companies have reported the following reasons behind their preference towards qualified skilled workers:

Corporate Social Responsibility	In order to meet their corporate social responsibility (CSR), the large progressive organizations create OJT opportunities for the students of technical and professional institutes. While providing OJT, the companies get the chance of preparing the pool of skilled workers for their upcoming needs.
Convenient recruitment	Qualified skilled workers can be recruited quite conveniently if the employer has prior communication and coordination with TVET institutes. Even the students can be recruited in advance for any future need. Also the system of internship and apprenticeship makes hiring even easier.
Fast tracks mastery	Basic understanding of qualified skilled workers towards the technical aspects of the job is quite strong. This enables them to attain mastery in a shorter span of time.
Potential to go up the hierarchy level	Literacy level and communication of a qualified skilled worker is better than the one coming from the master-helper channel. These attributes coupled with wider understanding of technical aspects create potential in him to go up the hierarchy level and undertake supervisory and managerial tasks efficiently. So, the qualified skilled workers fit well into the long-term plans of the companies with large set-ups..
Positive attitude	The institutional teachings and the stay in a formal educational environment automatically create specific traits and attitudes like courteousness, discipline, regularity and workplace ethics. Such personal attitudes are valuable to the system oriented large organizations On the other hand, the workers coming from master-helper channel often do not possess such traits and upset the work environment.
Material and equipment handling	The students of technical institutes are taught about better handling of materials and equipment. Hence, they tend to avoid material wastage and equipment damage. Such handling perfections benefit the employer in short as well as long run.
Health and Safety	As the students learn the aspect of safety while getting technical education, they can ensure better safety measures at work place and can minimize accidents at work place.

"We have special focus on creating the habit of punctuality, regularity and professionalism. That is the reason the large companies prefer to hire our students. By now many of our ex-students have gradually reached to key posts in companies" Muhammad Imran, OJT & Placement Officer VIT Sialkot

"We prefer the technical students because they are better in communication and have sense of safety, quality and time management. They can also make necessary calculations. Their switch-over time for a task is lower than a normal worker." Asad Bajwa, GM Talon Sports Ltd.

"The persons trained from our institute can handle things better. They can communicate well with their seniors and can maintain records. They can follow drawings." Engineer Ch. Muhammad Latif, Principal Standard Polytechnic Institute

"The stitchers from master-helper channel are easily available, but they maltreat out expensive machines and lead to rejections. Qualified stitchers are better value for money." Dr. Noman Idris Butt, CEO Capital Sports Ltd.

7.3 Reasons for Non-Preference of Qualified Skilled Workers

The reasons of low preference towards qualified skilled workers by majority of establishments have been stated to be as under:

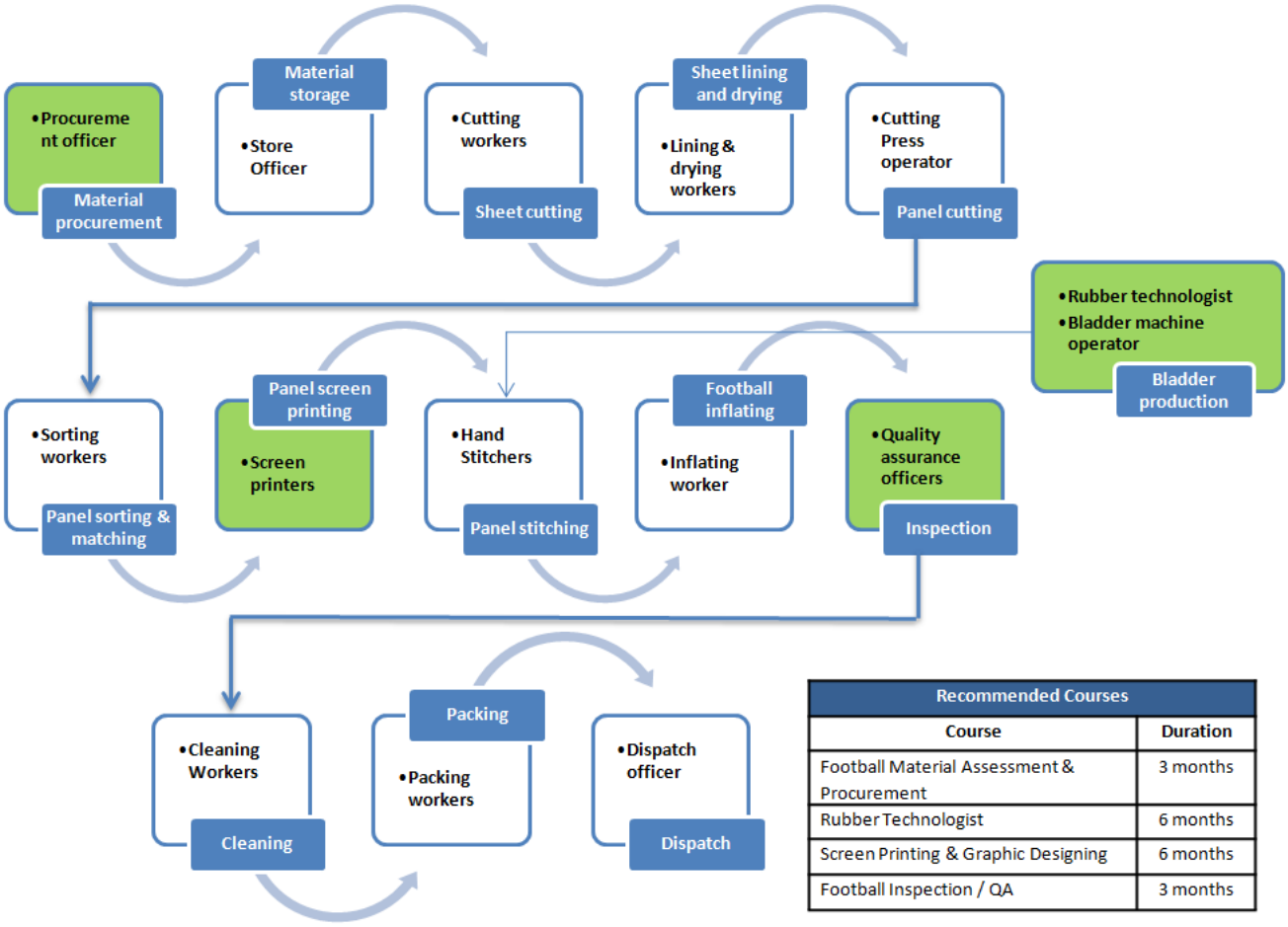
Low availability of qualified skilled workers	Almost all the medium and small establishments and even some large ones that were covered during expert interview phase indicated that they have never been approached by the pass-outs of TVET institutes for OJT or employment. The obvious reasons are the present limited output of TVET institutes (i.e. 500 pass-outs per annum available for sports goods sector) and preference of the pass-outs for large units only. "No skilled worker from any institute ever came to us for job. So, we have to totally rely on master-helper system. However, qualified persons for Admin and Accounts jobs come to us and we hire them." Muhammad Shoaib, Production Manager Gold Panel Ltd. "We never feel the need of qualified skilled workers and are okay with master-helper channel. When we hire a master/*karigar*, he himself brings helpers for him. On the other hand we cannot find qualified personnel so easily." Muhammad Akhtar, CEO Akhtar Yousaf Trading Co. Ltd.
Conventional proprietor culture / *saith* culture	The owners of majority of medium and small companies in Sialkot have low literacy and are running their enterprises in conventional style. Being less progressive, they tend to stick to old methods and systems. They generally hire labour on cheap rates and tend to have harsh attitude towards them and even sometimes use abusive language for them. They are comfortable with traditional master-helper system of labour provision. They perceive that the qualified skilled workers sophisticated and costly and they will not adjust in their specific environment.
Temporary hiring	Majority of medium and small manufacturers in Sialkot do not keep a permanent work force. This is because they do not have consistent orders from their customers. When they receive some order, they hire labour on contractual basis and get the order completed. After that they would free the labour as they are not able to bear their salaries until the next order comes. In these circumstances, the option of hiring permanent skilled workers with technical qualification does not exist with them. "We sometimes have less orders and sometimes more, so keeping a permanent labour is not feasible for us."Sheikh Khurram Shahzad, Proprietor Rimpa
Contractor system and per-piece wage system	Majority of medium and small companies and even many large companies have the system of contracted labour. They do not hire the labour directly, rather contract out the department to some contractor who is fully responsible of arranging the required number of labour and get the work done from them on the basis of per-piece wages. In this scenario, little space for permanent hiring of qualified skilled workers exists in such companies. "Traditional skilled workers/*karigars* suit more to the small units like us as we have to get the work done on per-piece basis. A qualified person is more interested in permanent job."Qaisar Mahmood, Proprietor Qaisar Gloves Maker

Not ready to pay higher salaries	Qualified skilled workers generally expect higher salaries than the ones given to traditional workers. Being highly cost conscious, specific manufacturers are not ready to pay higher salaries and provide additional benefits. Hence, they avoid hiring qualified skilled worker and go on with their cheaper traditional arrangements. "We have to compete in the market with low cost. So, we cannot afford high salaries of qualified persons. We easily hire skilled persons and helpers from the market when needed."Malik Hidayat, Proprietor Malik Bat
Not ready to give paid training	Medium and small manufacturers perceive that the passouts of technical institutes are quite raw in expertise and will need time to learn the tasks for a specific period. The manufacturers want that the hired person should start producing on very first day of his joining. It is a fact that the TVET qualified persons need some time to adapt their generalized knowledge into the specific mastery for the given task. So, the companies prefer such a skilled worker coming from master-helper channel that starts running the machine on the very first day of his duty. "A hockey manufacturer expects that a trainee of technical institute should start making hockey and give him financial benefit from his very first day. But this is not possible as he will first learn the mechanism behind the task and then start working in systematic way."Saeed Anwar, Principal Apprentices Training Centre Sialkot
Fear of wastage and damage	Manufacturers perceive that the workers coming from technical institutes would not be able to contribute to production at first; rather they would waste their time and material during the course of learning and even can damage tools and equipment during this process. "The employers of Sialkot are so much cost conscious that they do not bear any idle time. So, they do not prefer to hire a person on salary that needs further training. Even a large manufacturer doesn't give a frontline seat to a new passout of technical institute due to fear of wastage and damage. "Fouzan Muhammad, Manager
Fear of theft of company secrets	Sports goods manufacturers in Sialkot are highly conscious about the trade secrets including customer names, product designs and production systems. Therefore, they are reluctant to share information with new comers from formal training technical institutes. Workers under ustaad-shagardi system tend to stay longer and are committed to the work through heavy advance payments etc.

8. PRODUCTION PROCESS AND RESPECTIVE TRAINING NEEDS

8.1.1 Hand Stitched Football: The production of hand stitched footballs involves more than a dozen phases/tasks, while four of these may require technical courses[73]. The detail of production process and respective need of technical courses is as under:

Figure 7: Production process, Personnel Engaged and Courses Needed for Hand Stitched Football

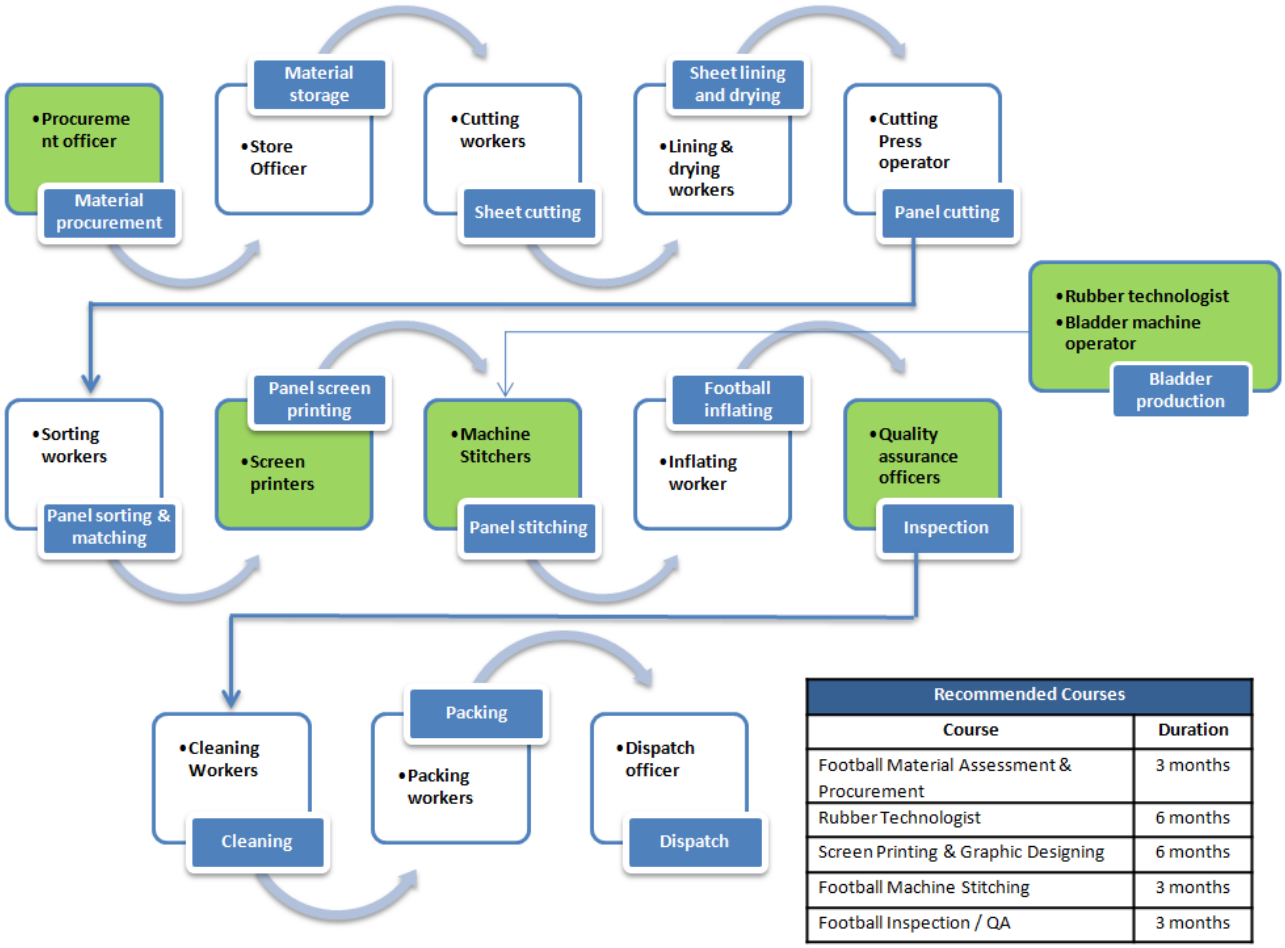


Recommended Courses	
Course	**Duration**
Football Material Assessment & Procurement	3 months
Rubber Technologist	6 months
Screen Printing & Graphic Designing	6 months
Football Inspection / QA	3 months

73

8.1.2 Machine Stitched Football: The production of machine stitched footballs involves around 15 phases/tasks, while four of these may require technical courses.[74] The detail of production process and respective need of technical courses is as under:

Figure 8: Production Process, Personnel Engaged and Courses Needed for Machine Stitched Football

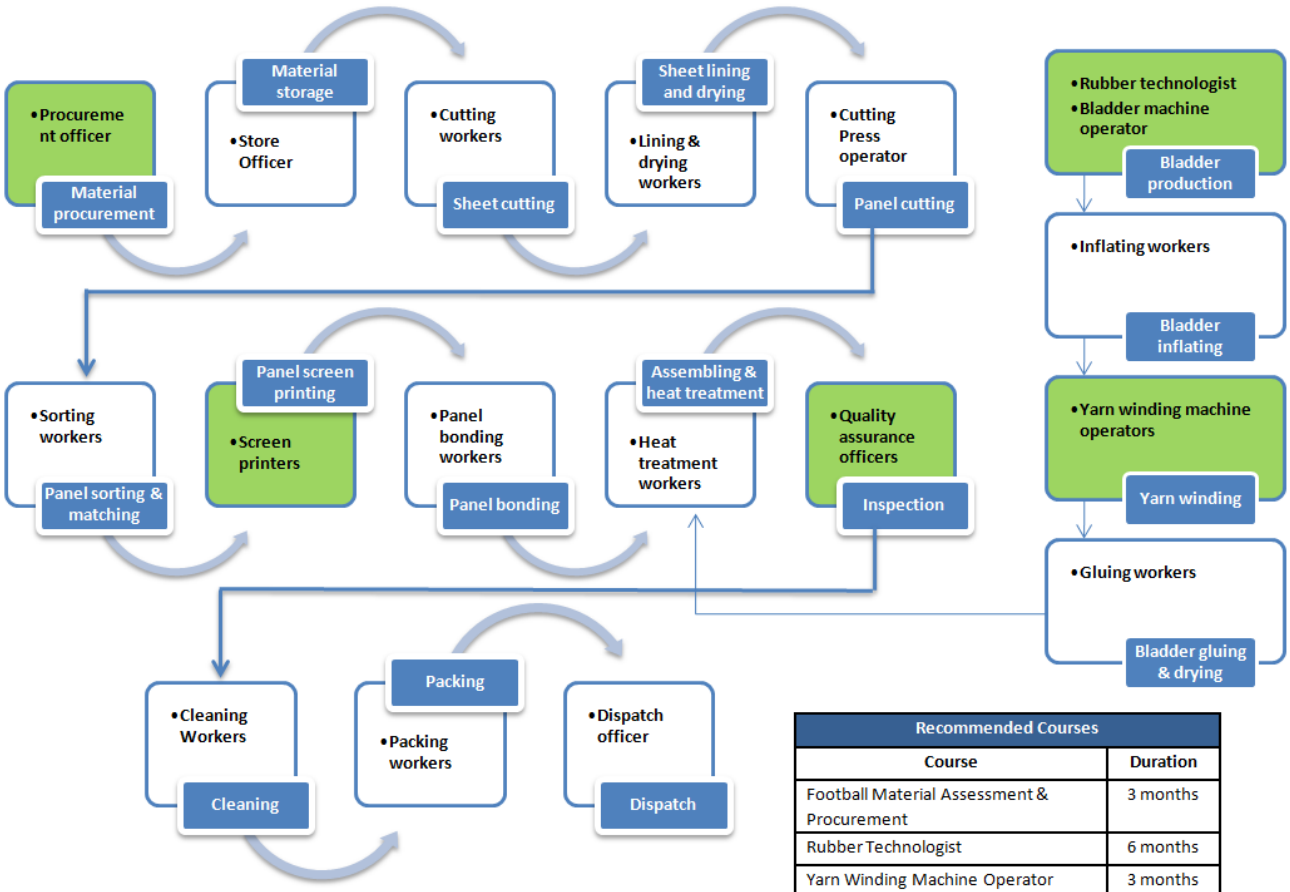


Recommended Courses	
Course	**Duration**
Football Material Assessment & Procurement	3 months
Rubber Technologist	6 months
Screen Printing & Graphic Designing	6 months
Football Machine Stitching	3 months
Football Inspection / QA	3 months

74

8.1.3 Thermo-bonded Football: The production of thermo-bonded footballs involves some 17 phases/tasks, while five of these may require technical courses[75]. The detail of production process and respective need of technical courses is as under:

Figure 9: Production Process, Personnel Engaged and Courses Needed for Thermo-bonded Football

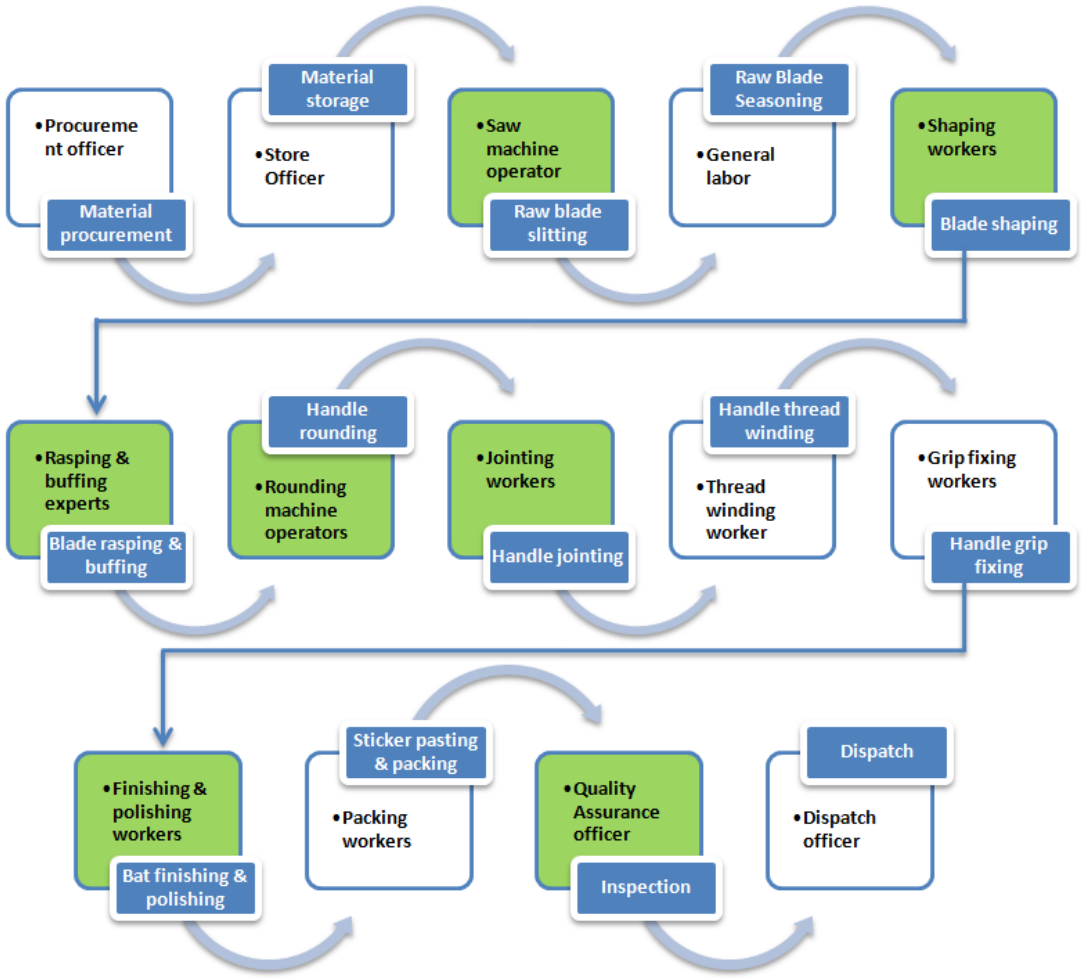


Recommended Courses	
Course	**Duration**
Football Material Assessment & Procurement	3 months
Rubber Technologist	6 months
Yarn Winding Machine Operator	3 months
Screen Printing & Graphic Designing	6 months
Football Inspection / QA	3 months

[75] Expert interviews + Facility Visits

8.1.4 Wooden Cricket Bat: The production of wooden cricket bats involves around a dozen phases/tasks, while seven of these may require a combined technical course[76]. The detail of production process and respective need of technical courses is as under:

Figure 10: Production Process, Personnel Engaged and Courses Needed for Wooden Cricket Bat

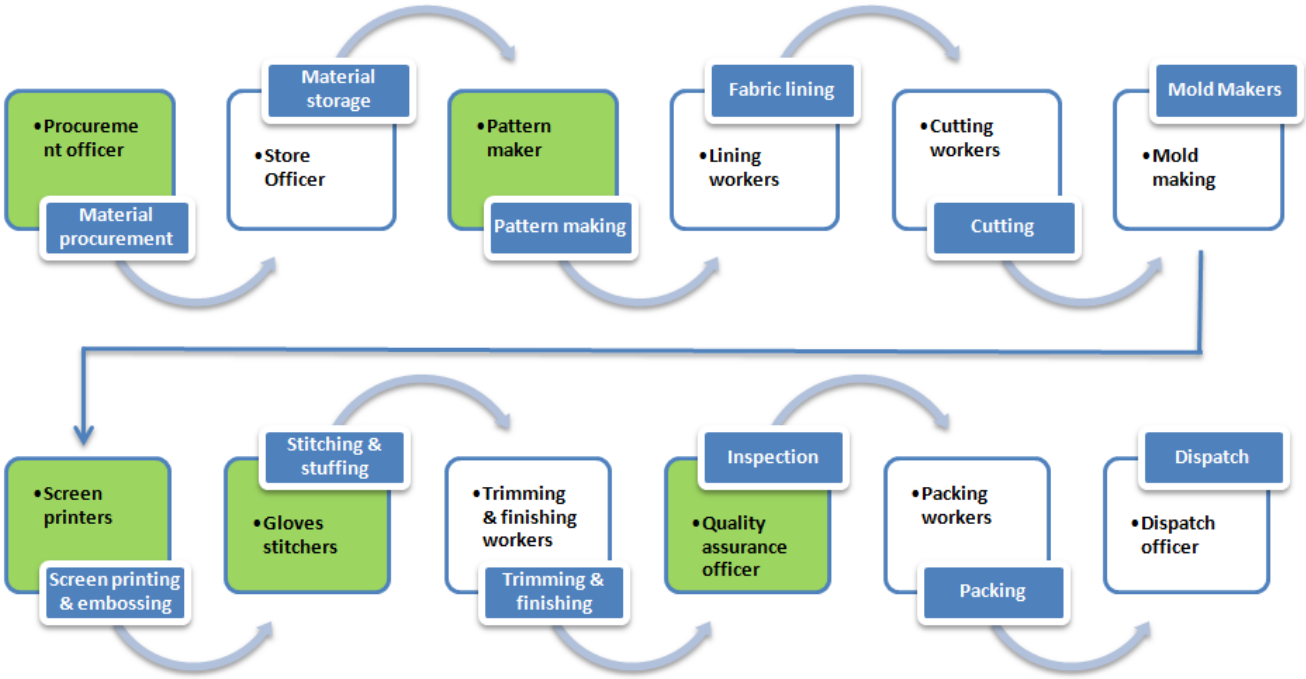


Recommended Courses	
Course	**Duration**
Bat making / Woodworking [Covering all aspects]	6 months

[76] Expert interviews + Facility Visits

8.1.5 Sports Gloves & other Protective Gears: The production of sports gloves and other protective gears involves around a dozen phases/tasks, while five of these may require technical courses[77]. The detail of production process and respective need of technical courses is as under:

Figure 11: Production Process, Personnel Engaged and Courses Needed for Sports Gloves & other Protective Gears

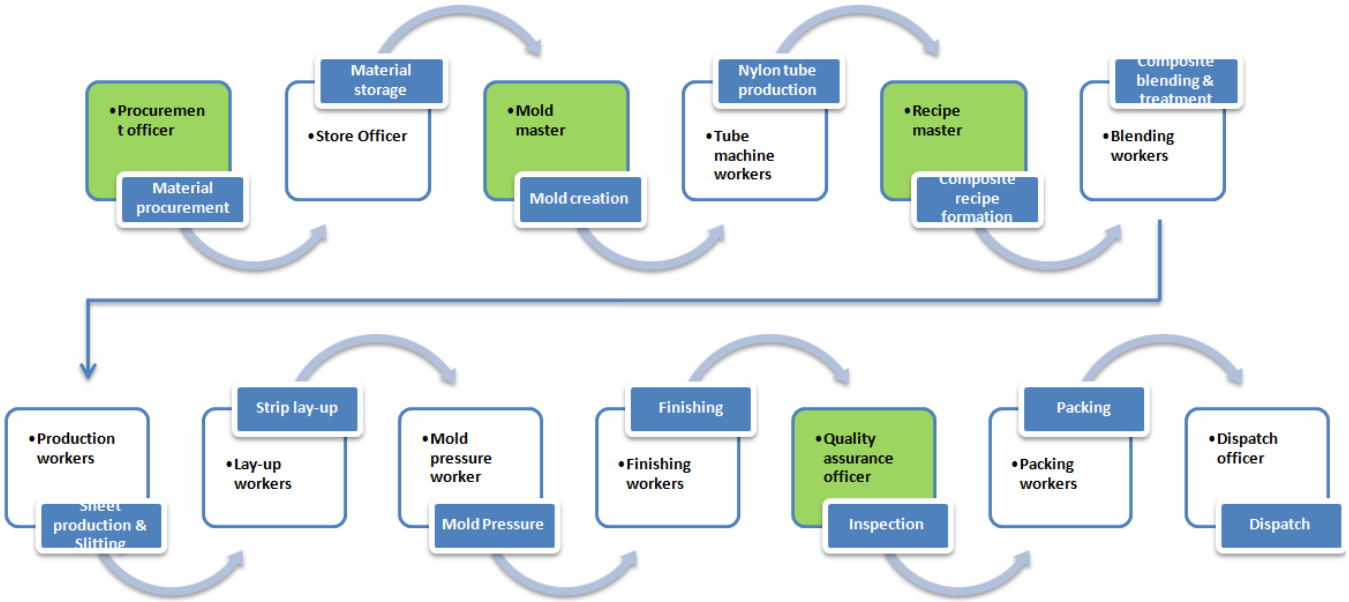


Recommended Courses	
Course	**Duration**
Gloves Material Assessment & Procurement	3 months
Pattern Maker	6 months
Screen Printing & Graphic Designing	6 months
Gloves Machine Stitching	6 months
Gloves Inspection / QA	3 months

[77] Expert interviews + Facility Visits

8.1.6 Composite Hockey Sticks: The production of composite hockey involves around 20 phases/tasks and supplementary processes, while four of these may require technical courses. [78]The detail of production process and respective need of technical courses is as under:

Figure 12: Production Process, Personnel Engaged and Courses Needed for Composite Hockey Sticks



Recommended Courses	
Course	**Duration**
Composite Material Assessment & Procurement	3 months
Mold Master	6 months
Composite Technology	6 months
Composite Products Inspection / QA	3 months

[78] Expert Interviews + Facility Visits

QUANTITATIVE SURVEY

SPORTS GOODS MANUFACTURING FIRMS

FINDINGS OF THE ESTABLISHMENT SURVEY

9. SURVEY DESIGN

9.1 Selection of Firms

The quantitative survey covered 300 firms (198 formal and 102 informal) in Sialkot city and its surrounding areas. The literature review covering previously published reports and statistics from SMEDA and the Sialkot Chamber of Commerce reveal that the total number of sports goods manufacturers in the cluster can be placed at close to 2,500 (Pakistan Bureau of Statistics, 2014)[79]. The survey sample was designed, based on this total number of firms as the total universe.

The sample was further broken down into quotas according to the following considerations:

- Products manufactured
- Registration Status
- Size of establishment

9.2 Design of Survey Tool

The survey questionnaire was designed in collaboration with the Punjab Skills Development Fund (PSDF). The aim of the survey was to determine the current skill levels in the industry and to identify any skills related gaps that can be fulfilled through skills training interventions in the cluster. This objective guided the design of the survey questionnaire. The questionnaire was divided into four main sections:

- Characteristics of Firms
- Characteristics of Workforce
- Current Training Status
- Training Needs Assessment

9.3 Geographical Locations

The sports goods manufacturing cluster is scattered around the city of Sialkot. The main concentrations are on Daska Road, Defence Road, Marala Road, S.I.E, Ugoki Road, Kashmir Road, Pasrur Road and

[79]Monthly Bulletin of Statistics Aug 2014; Pakistan Bureau of Statistics (http://www.pbs.gov.pk/sites/default/files/other/monthly_bulletin/monthly_bulletin_of_statistics_august_14.pdf)

Wazirabad Road. Apart from these areas, numerous football stitching centres are also established in villages and outskirts surrounding the city.

9.4 Response Rate

The response rates for establishment surveys are generally very low, owing to lack of time amongst managers at the establishments and their schedule[80]. The response rate for this survey stood at 32%. Most firms had to be contacted twice, first for an appointment and introductory meeting and second for the survey interview itself.

[80] Petroni, R., Sigman, R., Willimack, D., Cohen, S. and Tucker, C., 2004. Response rates and nonresponse in establishment surveys–BLS and Census Bureau. Federal Economic Statistics Advisory Committee, 1, p.50.

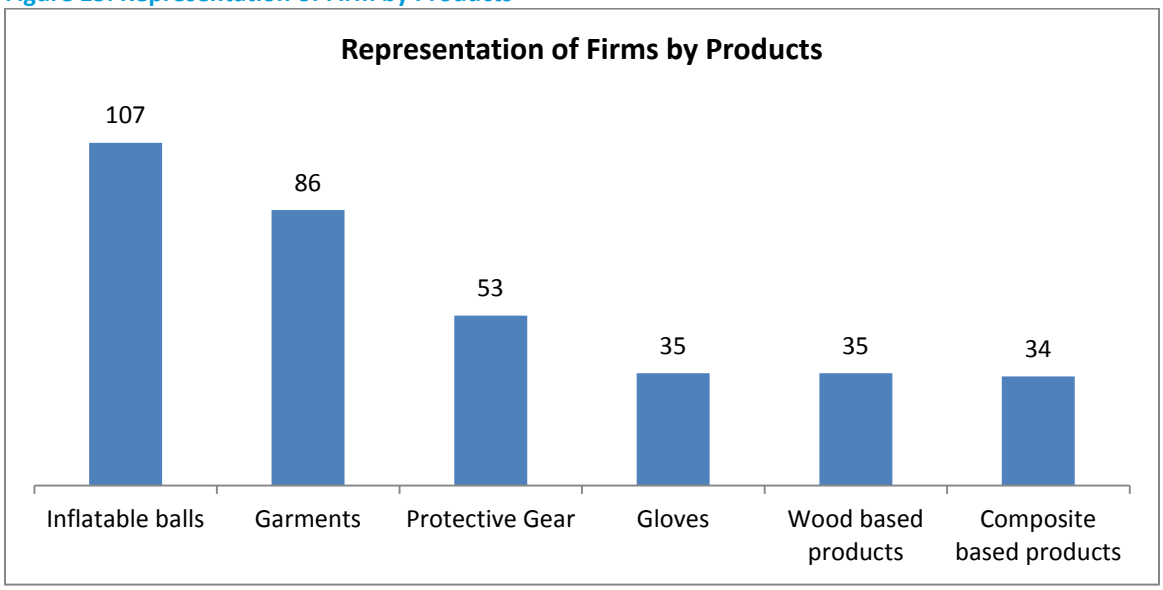
10. CHARACTERISTICS OF FIRMS

10.1 Representation of firms by products

The Sialkot sports goods manufacturing cluster produces a large variety of sports goods. The main outputs of the industry in terms of volume include inflatable balls, sports goods garments and gloves. To ensure that the study covered the skills dynamics of these main products, they were allocated a representative sample, based on the number of firms in the universe.

The achieved sample of firms has been represented below, categorized by the products manufactured.

Figure 13: Representation of Firm by Products

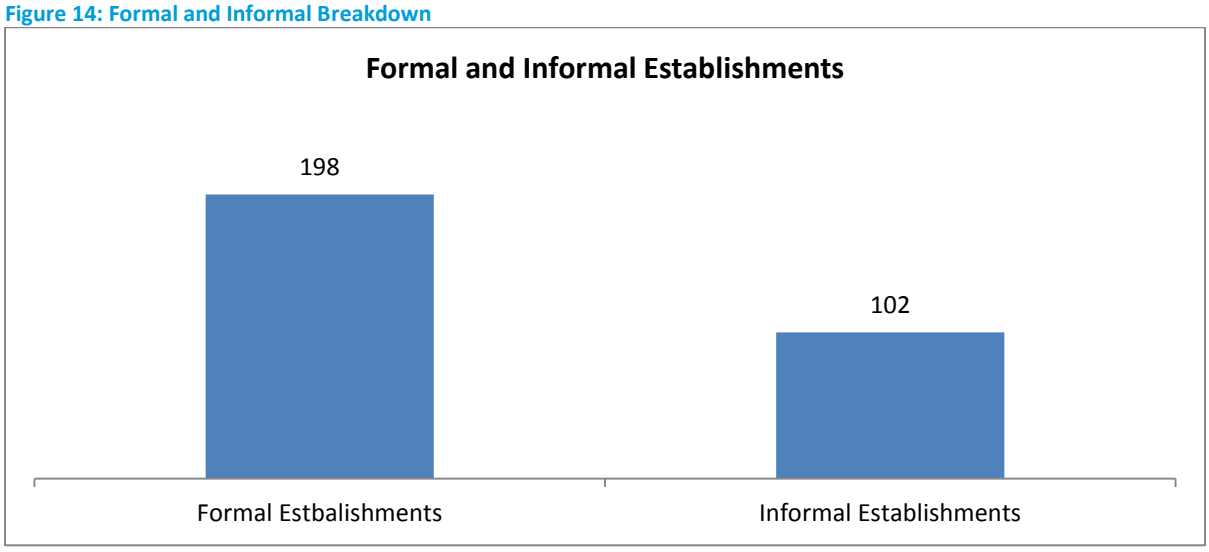


*N= 300 (*The above sum total exceeds the 300 sample covered by thee quantitative survey as some firms produced more than one key product.)

10.2 Formal & Informal Breakdown

The registration status was taken as a differentiator between formal and informal establishments. Based on this, 198 formal and 102 informal establishments were interviewed in the survey.

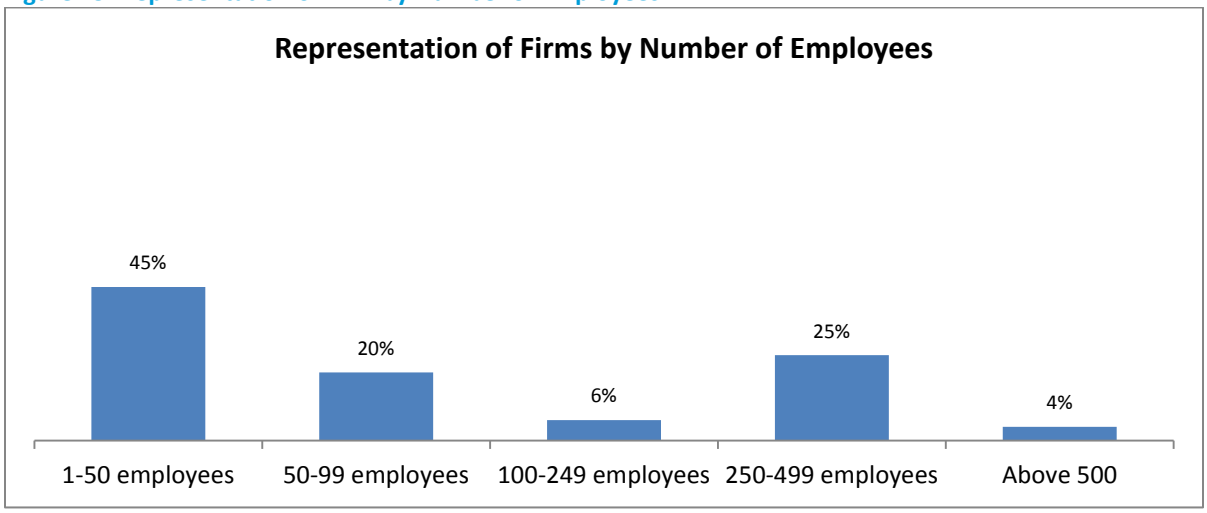
Figure 14: Formal and Informal Breakdown



N= 300 (All firms)

10.3 Firms by the Number of Employees

Figure 15: Representation of Firm by Number of Employees



N= 300 (All firms)

Majority of sports goods manufacturing firms located in Sialkot are Small and Medium Sized Enterprises (SMEs). Of the total interviewed firms, 71% belonged to the SME category with less than 250 employees, as defined by SMEDA categories of firm size by number of employees[81].

[81] http://www.smeda.org/index.php?option=com_fsf&view=faq&catid=3&faqid=48

10.4 Firm Departments and Job Titles

Firms were mapped for the different departments and titles given to their employees. Of the total firms interviewed, 65% had formal departments within their setup while 35% did not have any such arrangement. Smaller firms usually ran under the supervision of the owner or under a single supervisor responsible for overlooking entire operations. These firms also lacked formal titles and workers were known by the nature of their work for example, 'painter' or 'stitcher' or simply as 'karegar'. The most common titles used in the industry within the specific type of firms are presented in the table below:

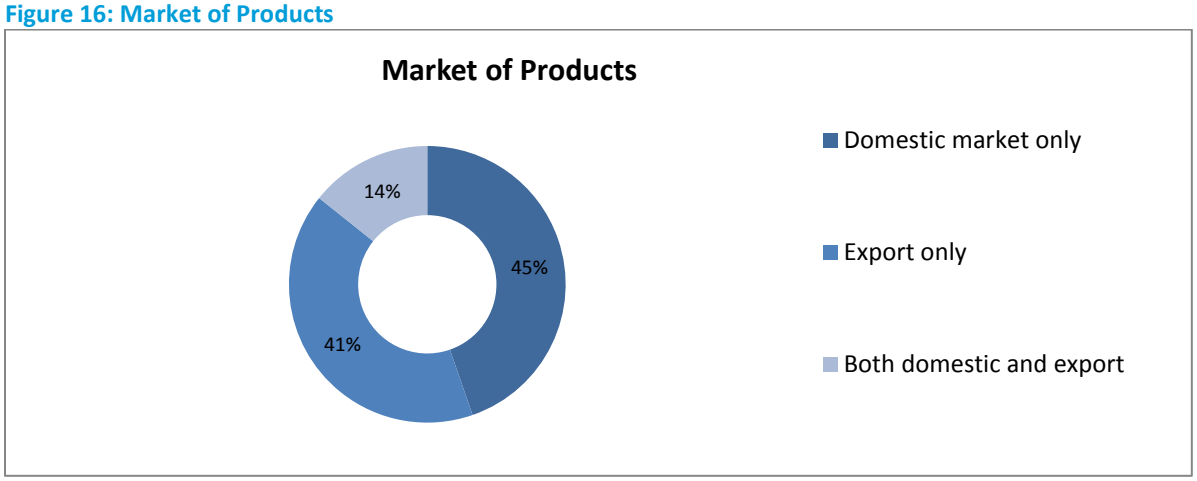
Table 17: Firm Department and Job Titles

Inflatable balls	Gloves	Sports Garments	Woodwork and composite based products
Purchase officer	Purchase officer	Purchase officer	Purchase officer
Panel cutter	Pattern maker	Pattern maker	Machine Operator (Saw machine, bladder machine, sheet cutting machine, etc.)
Laminator	Cutter	Cutter	Bat Scrub Master/ Karegar
Screen Printer	Gloves trimmer	Garment trimmer	Finishing workers (Ironing & Trimming)
Hand Stitcher/ Karegar	Gloves Stitcher/ Karegar	Garment Stitcher/Karegar	Inspector
Machine Stitcher/ Karegar	Packer	Finishing workers (Ironing & Folding)	
Quality inspector	Inspector	Inspector	
Packer			

10.5 Markets Supplied by Firms

Of the total interviewed firms, 55% exported their products to the international market, depicting the export oriented nature of the industry. It is pertinent to mention here that the firms supplying to domestic market includes those which are outsourced manufacturing units of larger manufacturers and commercial exporters. These firms do not take part in the export process themselves but their products reach international markets eventually through the indirect channel.

Figure 16: Market of Products

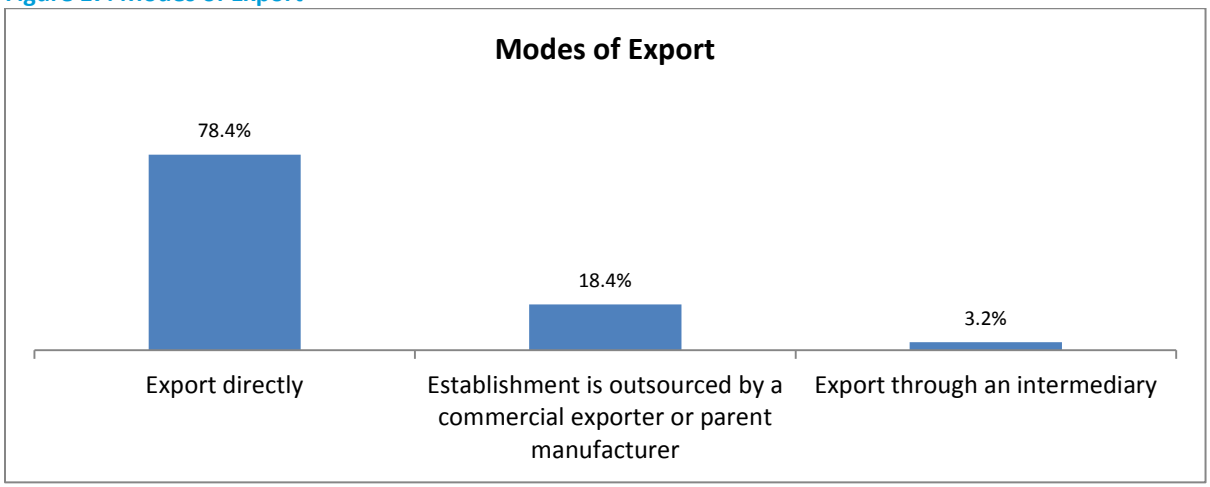


N= 300 (All firms)

10.6 Modes of Export

Firms which export their products were further asked about the modes through which they do so. A majority of firms (78%) export their products directly to another country using their self-developed contacts and trade linkages. A small percent of the firms (3%) use intermediaries like trading agents for their export and 18% of the firms are outsourced units of a larger commercial exporter or parent manufacturer.

Figure 17: Modes of Export



N= 185 (Firms which export their products)

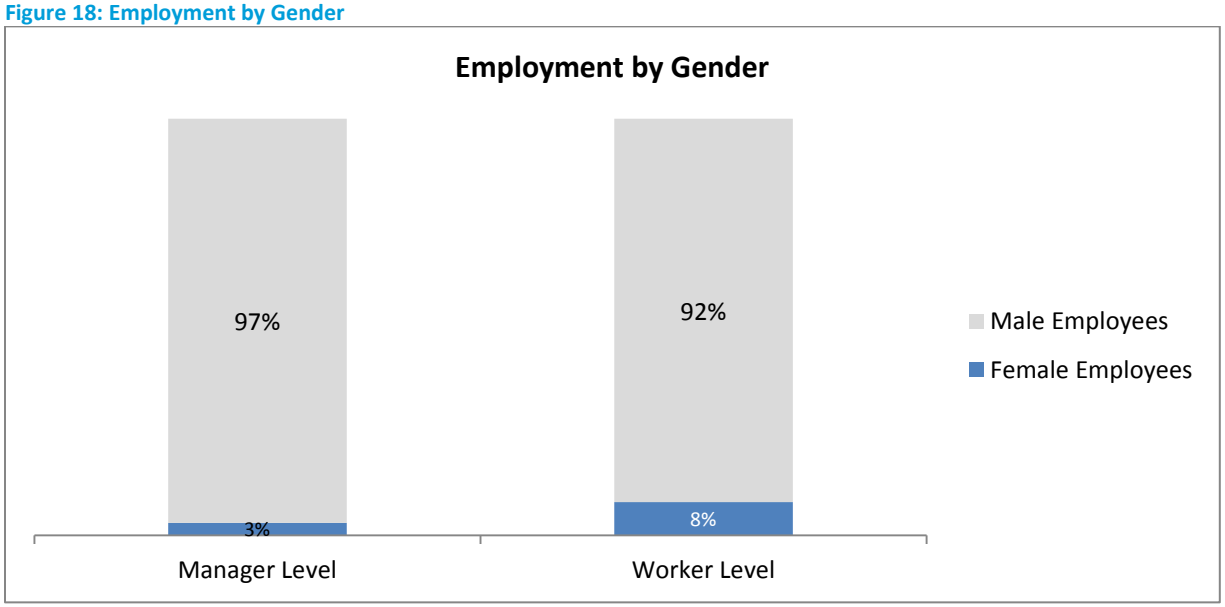
11. CHARACTERISTICS OF WORKFORCE

The survey questionnaire collected information about the workforce employed at establishment firms including the strength of the workforce, gender, employment structure and wages.

11.1 Employment by Gender

At the manager/supervisor level, very few women employees were found, contributing to only 3% of the workforce. At the worker level, the contribution of the women workforce grows to 8% of the total workforce.

Figure 18: Employment by Gender

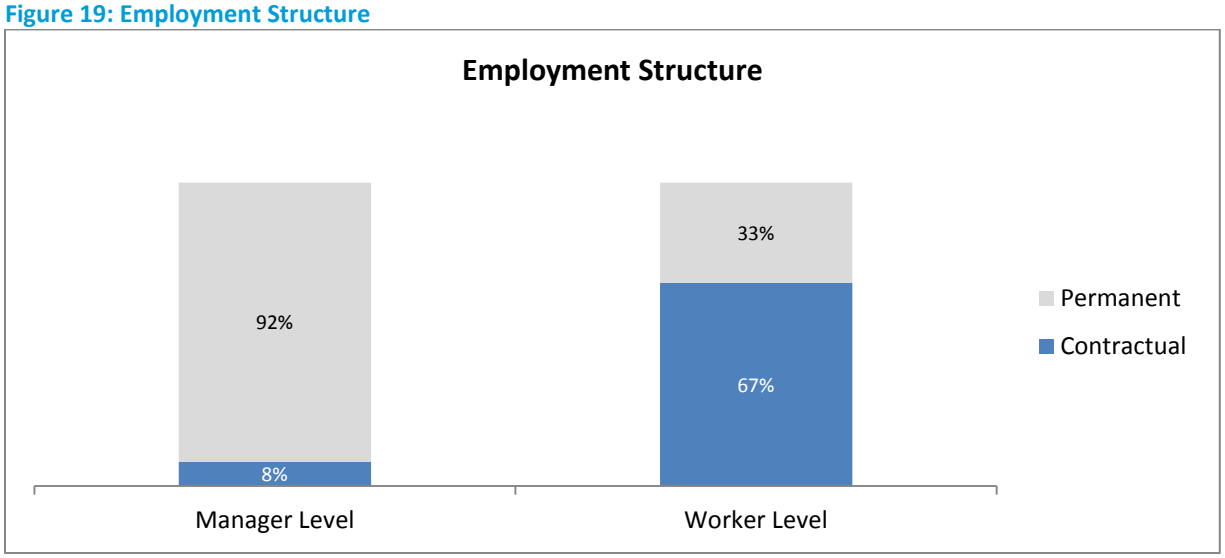


N= 300 (All firms)

11.2 Employment Structure

At the manager level, most employees (92%) have permanent employment contracts with regular wage structure. At the worker/operator level, most employees are contractual with wages paid on number of units produced or hours spent.

Figure 19: Employment Structure



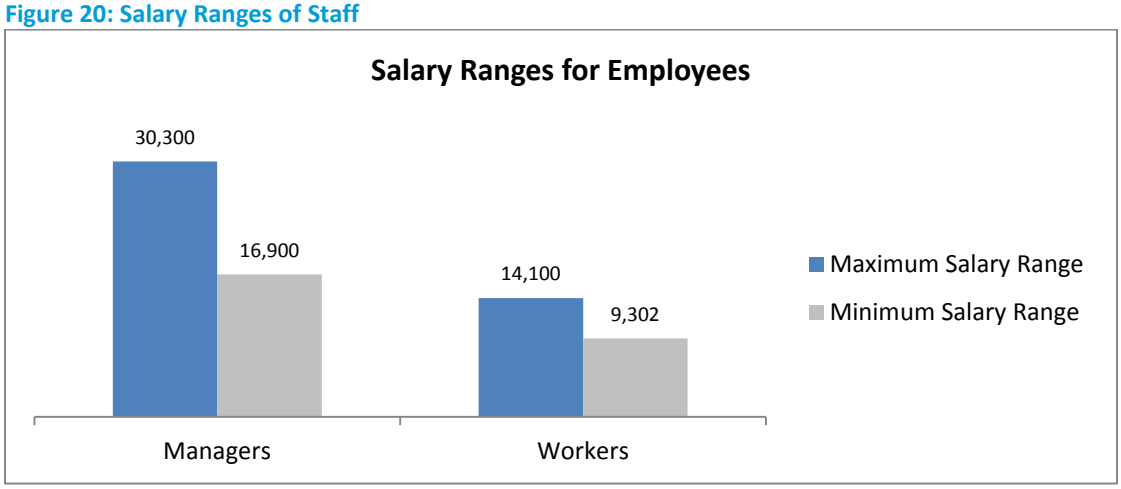
N= 300 (All firms)

11.3 Salary Ranges of Staff

The averages of the salaries received by manager level staff and worker level staff have been shown in figure 21. For the worker level staff, most employees are hired on contractual basis and are paid per-piece rates. For these workers, the average wages earned have been recorded to estimate monthly earnings.

The maximum average salary paid to managers and supervisory level employees in the sector is Pak Rs. 30,300 and the minimum is at Pak Rs.16, 900. For workers and operator level employees, the maximum salary average is Pak Rs. 14, 100 and the minimum is Pak Rs. 9,302.

Figure 20: Salary Ranges of Staff

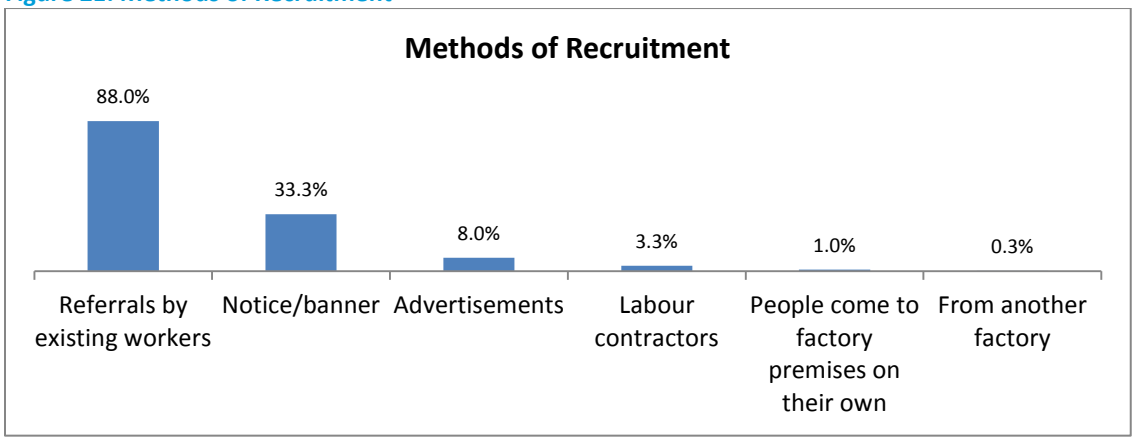


N= 300 (All firms)

11.4 Methods of Recruitment

A large majority of firms recruit their employees through referral by existing workers. Employees bring their friends and relatives to work when a vacancy opens. Another popular method for recruitment is through notice and banners placed on the gate and walls of the manufacturing units which would attract prospective employees. Advertisements in newspapers were used by 8% of the firms.

Figure 21: Methods of Recruitment

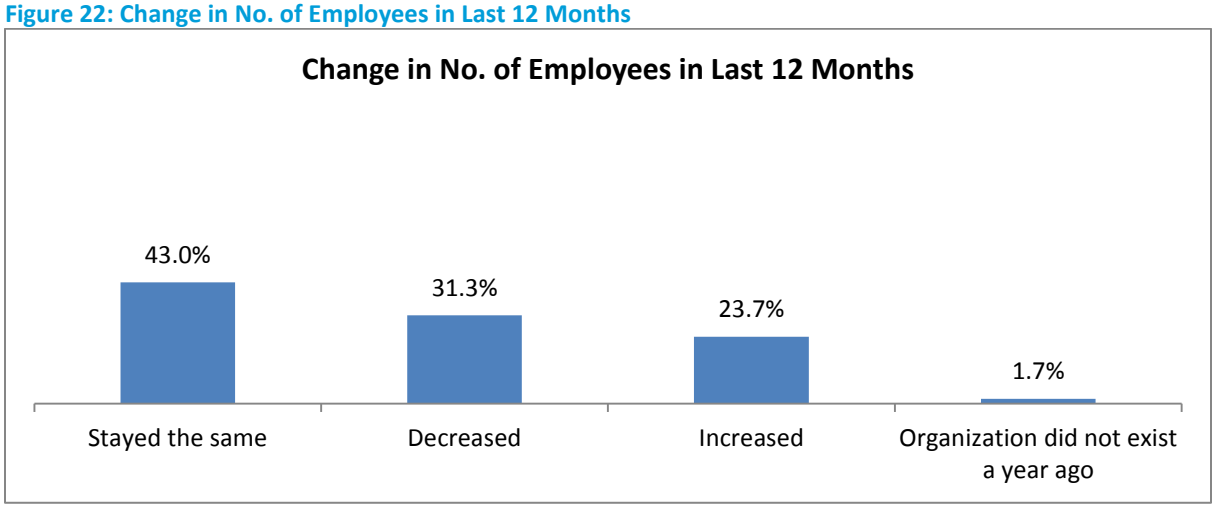


N= 300 (All firms) Percentage figures exceed 100 as a single firm could use multiple recruitment methods.

11.5 Change In Number Of Employees In Last 12 Months

Only 23.7% firms reported an increase in the number of their employees while 43% did not undergo any change in employee base. Overall, the numbers show that the industry is going through a contraction period. A possible reason for this observation could be the fact that there are no upcoming football or cricket tournaments in near future which has dampened production and order levels. The industry is largely driven by bulk orders and production levels are increased only after an order is received.

Figure 22: Change in No. of Employees in Last 12 Months

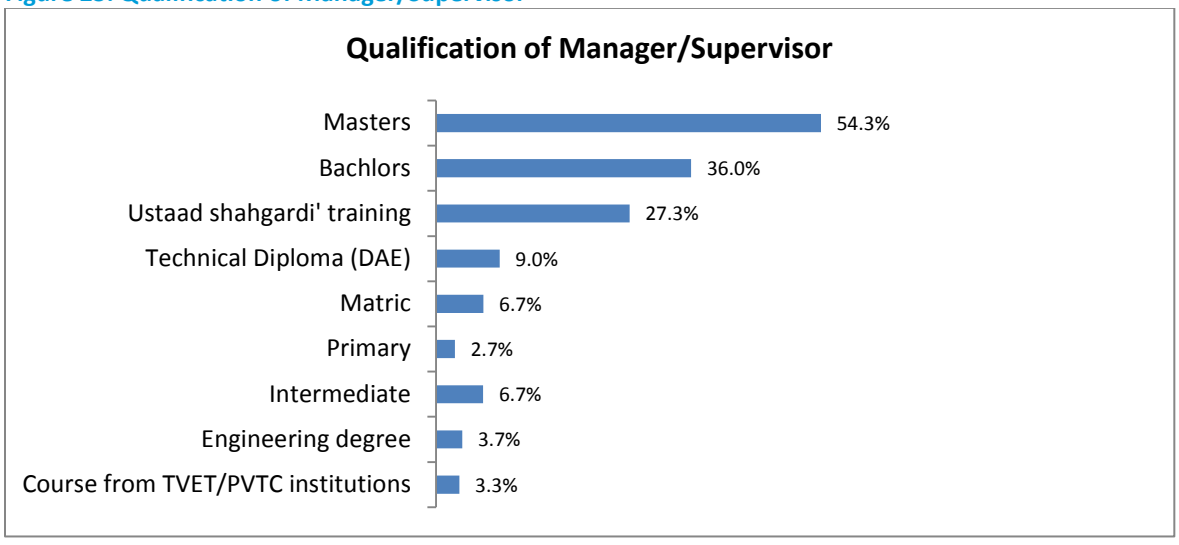


N= 300 (All firms)

11.6 Qualification Criteria for Recruiting Employees

Firms were asked about the qualification criteria they have placed on recruiting staff at manager/supervisor level and at the worker/operator level.

Figure 23: Qualification of Manager/Supervisor

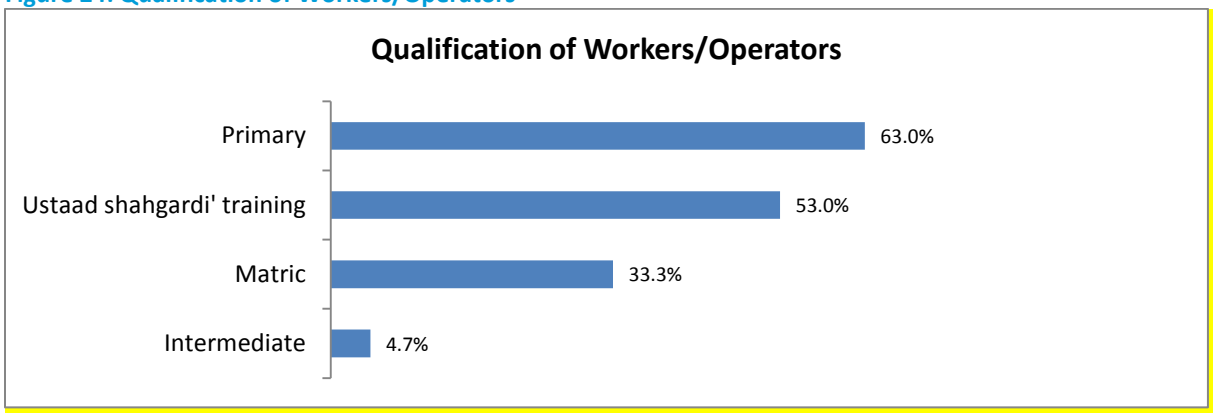


N= 300 (All firms. Percentage figures exceed 100 as a single firm could choose more than one qualification for recruiting)

At the manager/supervisor level, most firms (54.3%) require a master's degree for their manager/supervisor level staff. While there is an emphasis on academic qualifications, 27.3% also require that the manager/supervisor is also trained in the technical skills of the trade preferably through the traditional 'ustaad shahgardi system' which is the main mode of skills transfer and learning in the area.

At the worker/operator level, most firms (63.0%) recruit employees who possess primary education and have been trained under an 'ustaad'. Furthermore, none of the firms reported that they recruit workers above intermediate level education or trained from a TVET/PVTC institution. This implies that the sector does not have a preference for candidates qualified from vocational institutes as yet. This can also be attributed to the fact that the TSPs in the sector provide very few courses related to manufacturing of sports goods. Due to this, the preference for vocational qualified workers is not apparent.

Figure 24: Qualification of Workers/Operators



N= 300 (All firms. Percentages could exceed 100% as firms could choose more than one qualification

11.7 Current Vacancies at Firms

Firms were asked about the current vacancies for managers and worker level staff at their establishment. For the manager level, only seven (7) of the 300 firms had vacant vacancies and reported a total of 10 vacancies. The details of these vacancies have been given below:

Table 18: Current Vacancies at Firms (Managers)

Vacancy Title	No. of vacant positions	Qualification Required	Experience Required (years)	Estimated Future Demand (Next three years)
Human Resource Officer	1	MBA	0	0
Marketing Manager	1	Masters	10	1
Chief Accountant	1	MBA	5	0
Supervisor Quality Control	1	Bachelors	1	1
Purchase Manager	1	Bachelors	5	0
General Manager	3	Intermediate	3	6
Marketing Officer	2	Intermediate	3	10
Total No. of Vacancies	**10**			**18**

N= 7(All firms with current vacancies for managers/supervisors)

There were greater vacancies at the worker/operator level. Of the 300 firms interviewed, 43 (14.3%) had current vacancies for workers in their establishments. The total numbers of current vacancies reported were 499.

Table 19: Current Vacancies at Firms (Workers)

Product Category	Title	Number of vacancies	Qualification	Experience	Estimated Demand (3-5 years)
Inflatable balls	Hand Stitcher	65	No educational criteria/ Skilled at stitching	2 years	40
	Cutting worker	18	No educational criteria/ Master trained	5 years	21
	Screen Printer	10	Matric/DAE diploma	3 years	13
	Bladder Machine Operator	10	No education/Skilled	1 year	19
	Machine Stitcher	160	No educational criteria/ Skilled at stitching	2 years	260
	Sales Boy	2	Bachelors	3 years	20
	Packer	12	No education	No experience	10

Wood based products	Wood Jointer	6	No education/Skilled	2 years	12
	Sampler	8	No education/Skilled	2 years	12
	Saw machine operator	6	No education/Skilled	3 years	13
	Polish workers	12	No education/Skilled	2 years	12
	Blade shaper	3	No education/Skilled	No experience	5
	Packer	2	No education	No experience	6
Gloves and Protective Gear	Machine stitcher	150	No educational criteria/ Skilled at stitching	1/2 years	204
	Lamination worker	5	No educational criteria/ Skilled	2 years	9
	Screen Printer	11	No educational criteria/ Skilled	No experience	10
	Packer	16	No education	1 year	20
	Finishing worker	8	No education/Skilled	1 year	16
Composite Products	Mold Master	3	Matric/DAE diploma	3 years	5
	Tube machine workers	4	Matric/DAE diploma	3 years	7
Total number of vacancies		499			714

N= 43 (All firms with vacancies for workers/operators)

11.8 Hard to Fill Vacancies

At the manager level, firms did not experience hard-to-fill vacancy except for the position of Marketing Manager. The main constraint for the marketing position was the lack of applicants with good interpersonal skills. At the workers level, firms experienced difficulty in filling positions for machine stitcher and machine operator. Firms producing hand stitched inflatable ball did not report need for hand stitcher, implying that the need for this task is being adequately filled by the labor force. Twenty seven (27) of the 43 firms with vacant positions felt difficulty in filling the following positions.

Table 20: Hard to Fill Vacancies

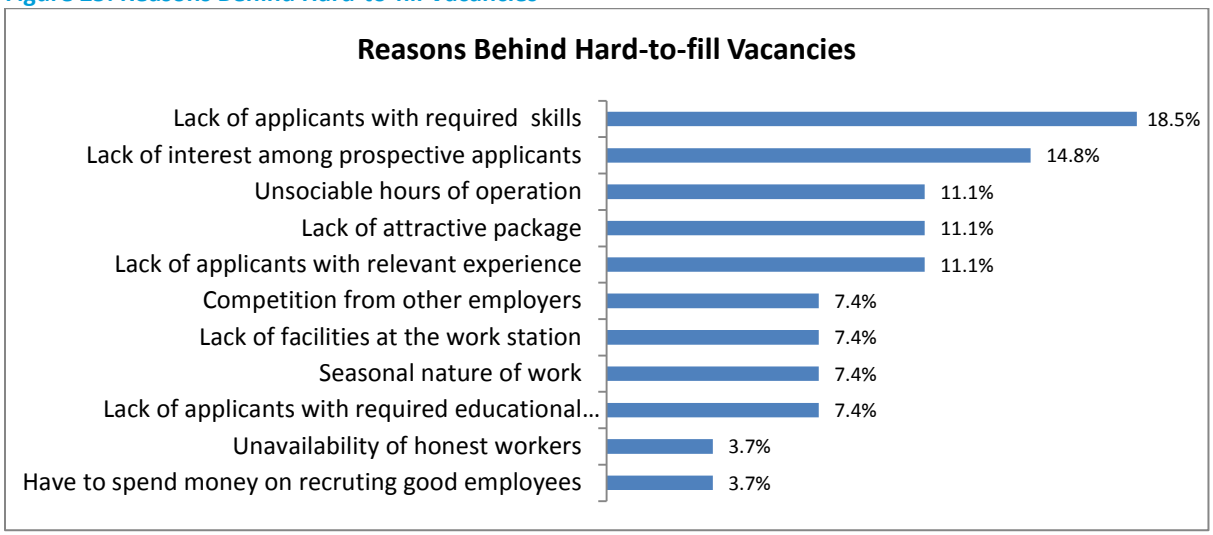
Job role	Duration since vacant	Positions available (cumulative)
Machine Stitcher	6 months (Constant deficit in market)	300
Saw Machine Operator	1 year	5
Bladder Machine Operator	1 year (Constant deficit in market)	4
Tube Machine Worker	2 year	1

N= 27 (Firms with hard to fill vacancies)

11.9 Reasons behind Hard-to-fill Vacancies

Firms which reported difficulty in filling up current vacancies were further asked about the reason due which the difficulty is occurring.

Figure 25: Reasons Behind Hard-to-fill Vacancies



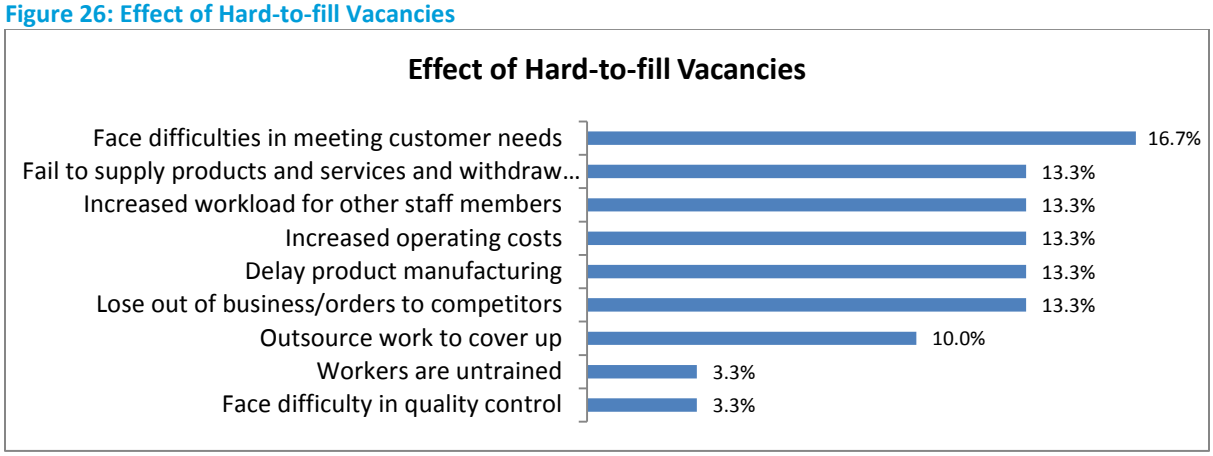
N= 27(Firms with hard to fill vacancies)

The main reason quoted by firms facing difficulty in filling current vacancies is 'lack of applicants with required skills', cited by 18.5% of the firms followed by 'lack of interest among prospective applicants' (14.8% firms).

11.10 Effect of Hard-to-fill Vacancies

Firms with hard-to-fill vacancies in their organization were further asked about any impact or loss that they faced as a result of the vacant vacancies.

Figure 26: Effect of Hard-to-fill Vacancies



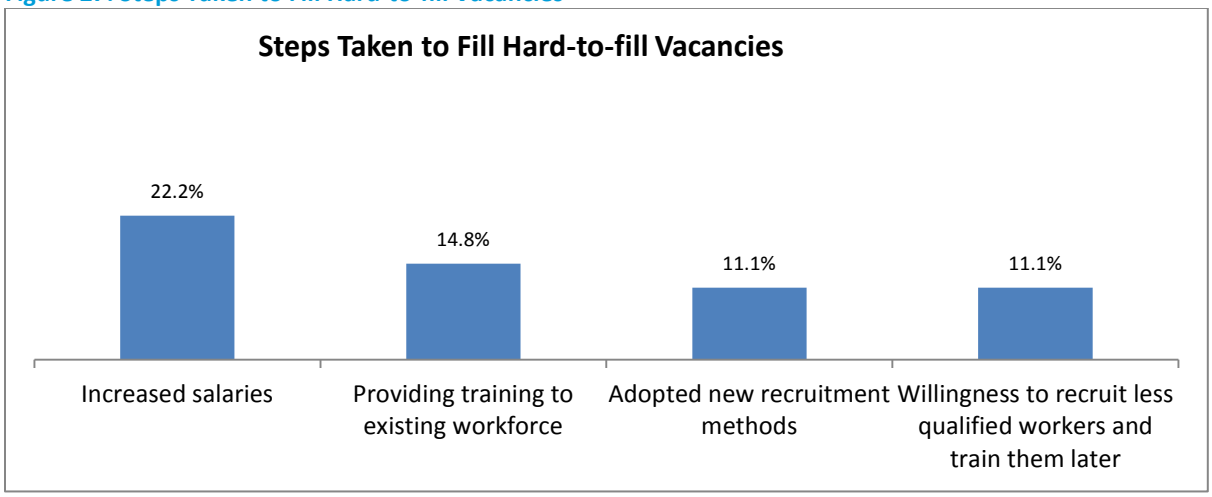
N=27 (Firms with hard to fill vacancies)

All of the firms reported some kind of organizational loss due to the vacancy of these positions. The most quoted impact for the firms was that they 'face difficulties in meeting customer needs', felt by 16.7% of the firms with hard to fill vacancies.

11.11 Steps Taken to Fill Hard-fill-Vacancies

To overcome the challenge of filling Hard to fill-vacancies, 22.2% of the firms increased salaries to make the job offer more appealing. Another 14.8% provided training to the existing workforce so that they can perform the jobs required for the vacancy. New recruitment methods were employed by 11.1% of the firms while an equal percentage of firms also showed willingness to compromise on their set requirements and hire less qualified workers to train them later.

Figure 27: Steps Taken to Fill Hard-to-fill Vacancies

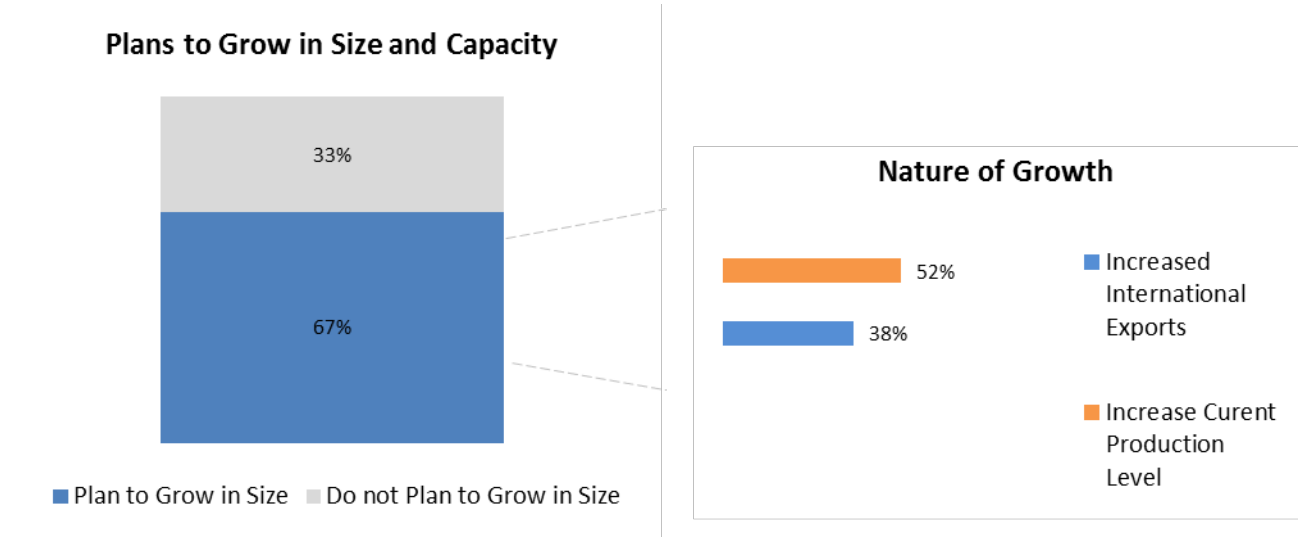


N=27 (Firms with hard to fill vacancies)

11.12 Plans to Grow in Size and Capacity

On a positive note for the industry, 67% of all firms plan to grow in size in the next five years. Of the firms with growth plans, 52% plan to do so through an increase in current production, 38% through increased international export. 15% of the firms plan to open a new unit within Sialkot city while 10% of the firms plan to install new machinery within their establishments to increase production levels.

Figure 28: Plans to Grow in Size and Capacity



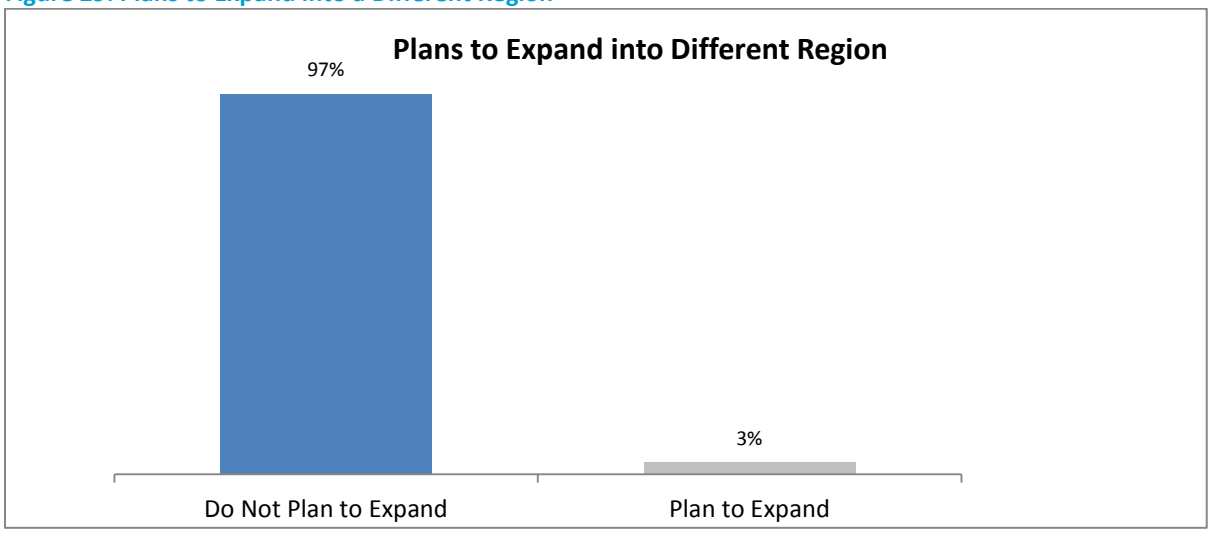
N= 300 (All firms)

(Percentage figures for nature of growth could exceed 100% as a single firm could identify different options of growth)

11.13 Plans to Expand Into a Different Region or Market

On the other hand, very few establishments showed their plans to expand into a different locality of geography. As shown from the figure below, only 3% of the establishments plan to expand their operations into a different region. The low percentage of firms with plans to expand into other regions can be attributed to the advantages of being located within the Sialkot cluster including access to raw material, labor and historical knowledge. Due to this, very few firms indicated plans to move to other manufacturing regions within the country.

Figure 29: Plans to Expand into a Different Region



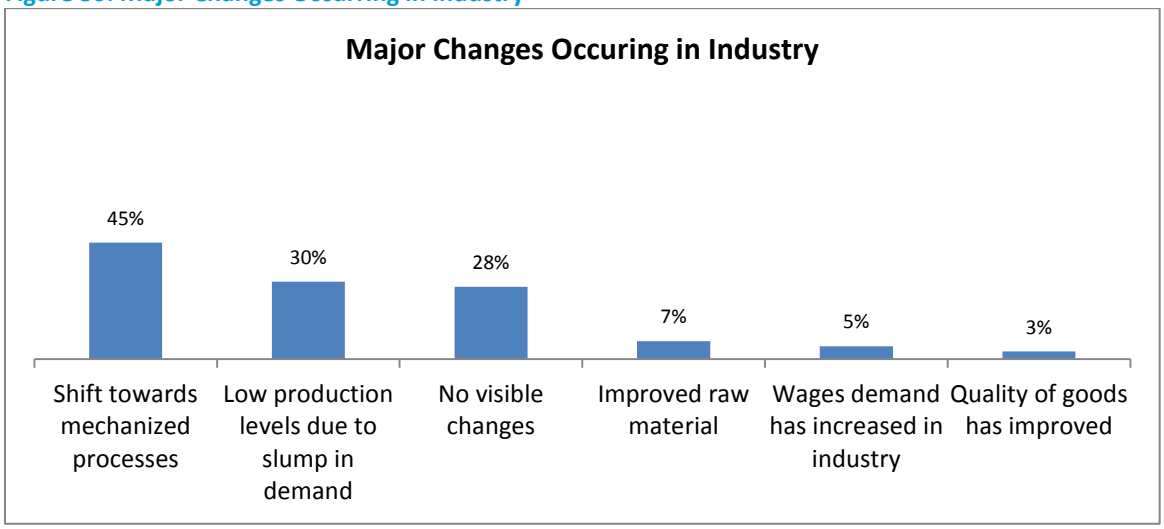
N= 300 (All firms)

Of the 10 establishments with plans to expand to another locality, eight (8) wanted to open another unit in a different area within Sialkot while one planned to move to Gujranwala and another planned to move to Lahore.

11.14 Major Changes Occurring In Industry

Establishments were asked about the three main important changes that were taking place in the industry. A large majority of firms (45%) feel that the sector is moving towards mechanized processes with new production machinery being imported that replaces historical labour skills. Roughly one third (30%) of the firms have felt the brunt of low production levels in the last two years, especially after the FIFA world cup. There is a slump in international demand as no major event is up-coming. Firms in the garment and leather segment (7%) stated that they received an improved quality of raw material for their products which improves their final product output.

Figure 30: Major Changes Occurring in Industry



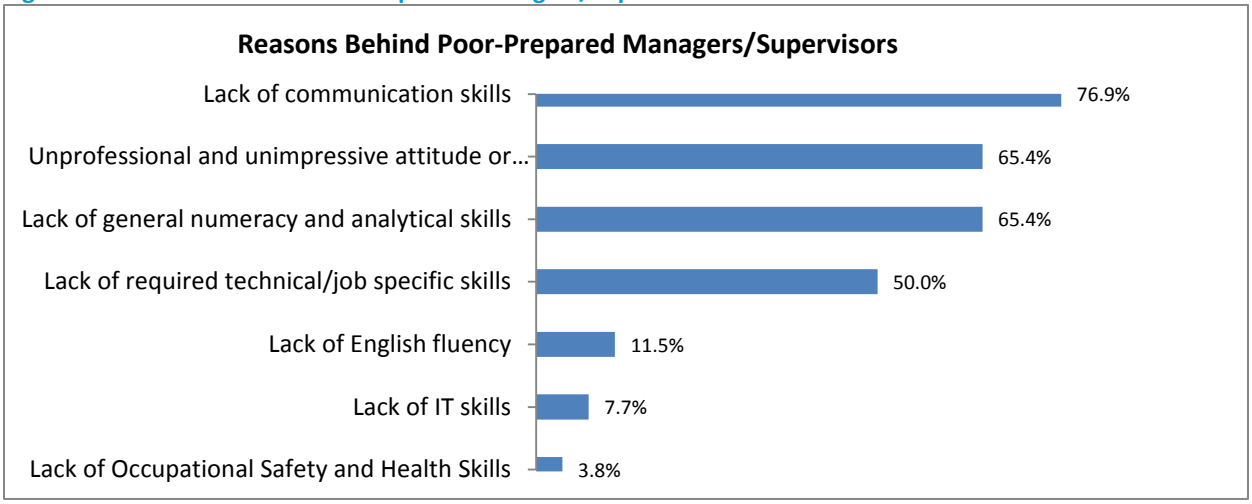
N= 300 (All firms. Percentage figures exceed 100% as a single firm could identify up to 3 major changes occurring in the industry)

12. CURRENT TRAINING LEVEL

12.1 Job Preparedness Level of Manager/Supervisors Hired During Last Three Years

Firms were found to be generally satisfied with the job preparedness level of the employees they recruited at managerial and supervisory level over the past few years. Only 9% of the firms stated that their employees were 'poorly prepared' for the skills required for their job. The top most reason of dissatisfaction was lack of communication skills followed by unprofessional attitude. The details on the reasons quoted by these firms are presented in the chart below:

Figure 31: Reasons Behind Poor-Prepared Managers/Supervisors

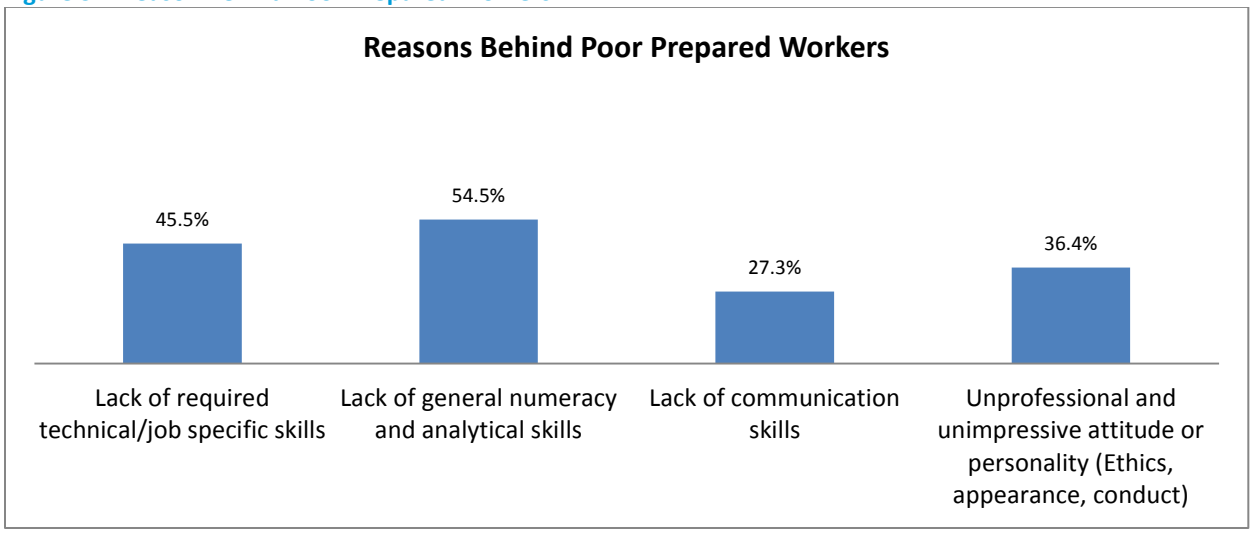


N= 26 (Firms which hired 'poor prepared' managers/supervisors during the last 3 years)

12.2 Job Preparedness Level of Workers/Operators Hired During Last Three Years

The satisfaction level with the employees hired at workers/operators level was higher than that of the managerial level. Only 3.6% firms responded that they considered the workers hired during the last three years as 'poorly prepared' for their job. The reasons given by this small number of firms include:

Figure 32: Reason Behind Poor Prepared Workers



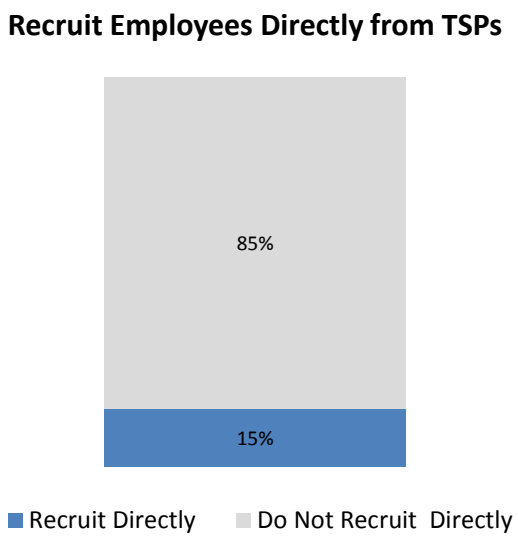
N= 11 (Firms which hired 'poor prepared' workers/operators during the last 3 years)

12.3 Direct Recruitment from Skill Training Providers

Respondent firms to the survey were asked whether they recruited employees directly from any training service providing institution. The results reveal that 15% directly hire from skill training providing institutions present in Sialkot. Out of the 15% firms which recruit directly, 89% recruit from TEVTA Sialkot while the rest (11%) recruit from private institutions[82].

[82] Sialkot Technical Institute, Kasib Polytechnic Institute

Figure 33: Recruit Employees Directly From TSPs

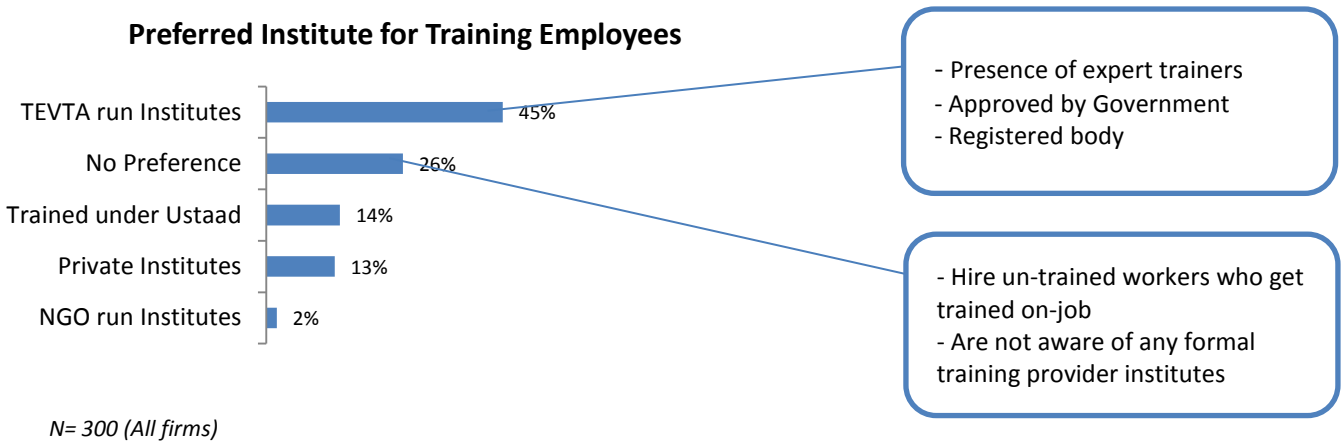


N= 45 (Firms which recruit directly from TSPs)

12.4 Preferred Institute for Training Employees

Firms were further asked which institute they would prefer for training their employees. Majority of firms (45%) prefer TEVTA run institutes. The reasons for this preference include the presence of expert trainers in such institutes and the fact that they are approved by government. Of the firms, 26% expressed that they had no preference regarding training their employees as they mainly hire untrained workers who are then trained on job. These firms were also unaware of the availability of training service providing institutions in the locality.

Figure 34: Preferred Institute for Training Employees

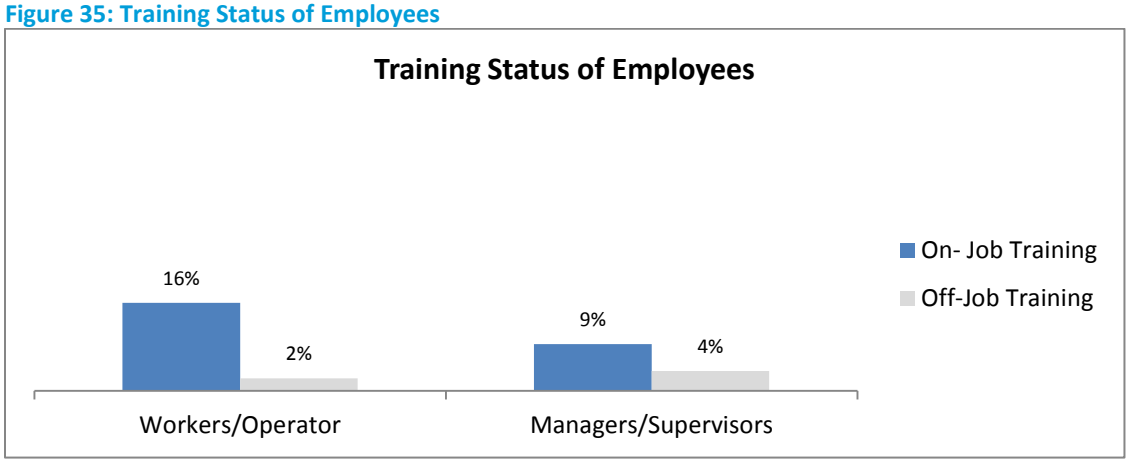


N= 300 (All firms)

12.5 Training Status of Employees

All firms were asked about any training that they provided to their employees either on-job or off-the-job premises. At the worker/operator level, only 16% of the firms provided on-job training and 2% of the firms provided off-job training. At the managers/supervisor level, 9% firms provided on-job training while 4% provided off job training to their employees. This reveals that 82% of the worker level staff and 87% of the manager level staff at these establishments had not received any kind of training.

Figure 35: Training Status of Employees



N= 00 (All firms)

Firms which provided any kind of training to their employees were further asked about the nature of the training arranged by them for their employees. Their responses were recorded verbatim. The details of the training courses provided by the firms to their employers have been provided below. Majority of the firms which provided training to their employees did so for health and safety and quality control.

Table 21: Training Status of Current Workforce

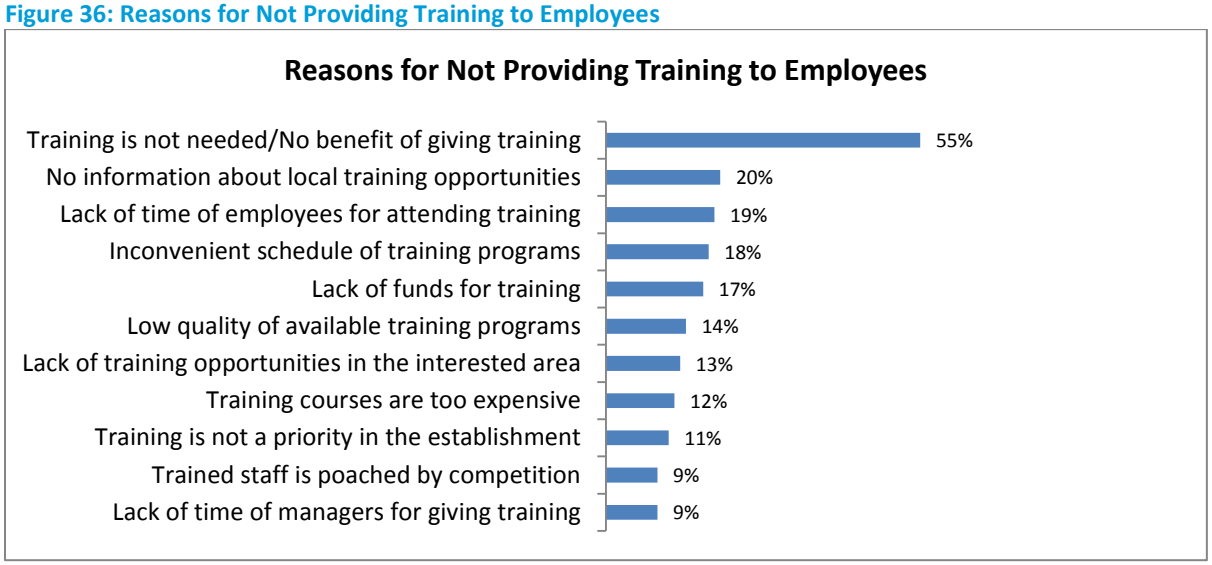
Off Job training				**On-Job Training**			
Managers		Workers		Managers		Workers	
Lean Systems	2%	Quality checking	2%	**Production mechanism**	2%	Product manufacturing	10%
Health & Safety	4%	Fire safety	1%	**Orientation**	3%	Health and Safety	10%
Accounting	1%	Health and Safety	1%	**Health and Safety**	10%	Basic operations	5%
Quality Control	4%			**Client Servicing**	2%		

N= 54 (Firms which provide any kind of training to their employees. Multiple response for each firm)

12.6 Reasons for Not Providing Training to Employees

Firms which did not provide any on-job or off-job training to their employees were further asked the reason for not doing so. A large majority of the firms (55%) were of the view that their employees did not need training and there was no benefit of training them. Of the firms, 20% had no information about local training opportunities while 19% stated that their employees did not have time for attending training. Lack of funds for training was cited by 17%of the firms as a reason. It is worthy to note that a large majority of the firms do not think training is beneficial for their employees, perhaps one of the reasons why very few firms had actually provided training to their employees.

Figure 36: Reasons for Not Providing Training to Employees

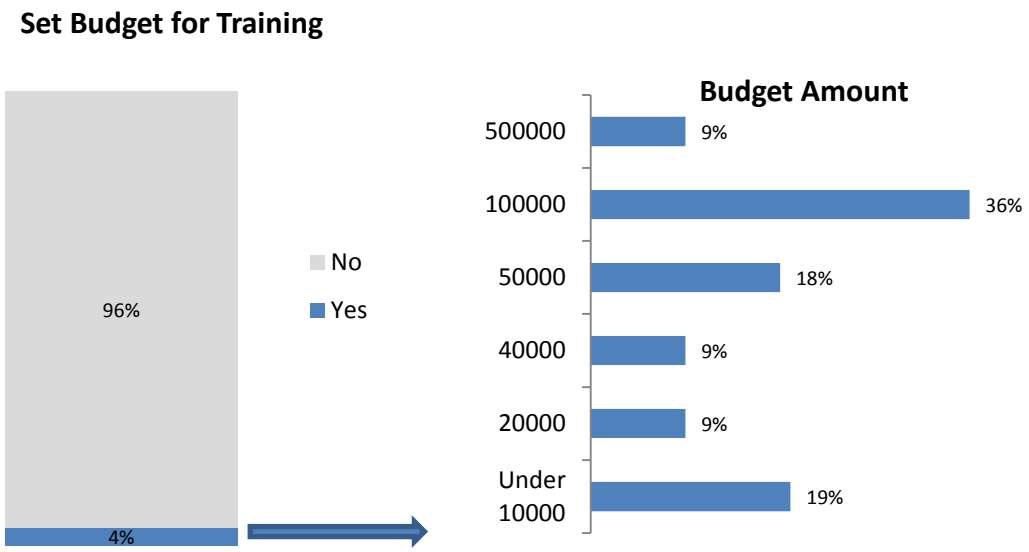


N= 246 (Firms who do not provide any kind of training to their employees)

12.7 Budget for Training

Only 12 of the 300 firms (4%) interviewed had a set budget for training in their organizations. Of this 4%, majority of firms (36%) had a budget cap of Rs. 100,000 for training purposes.

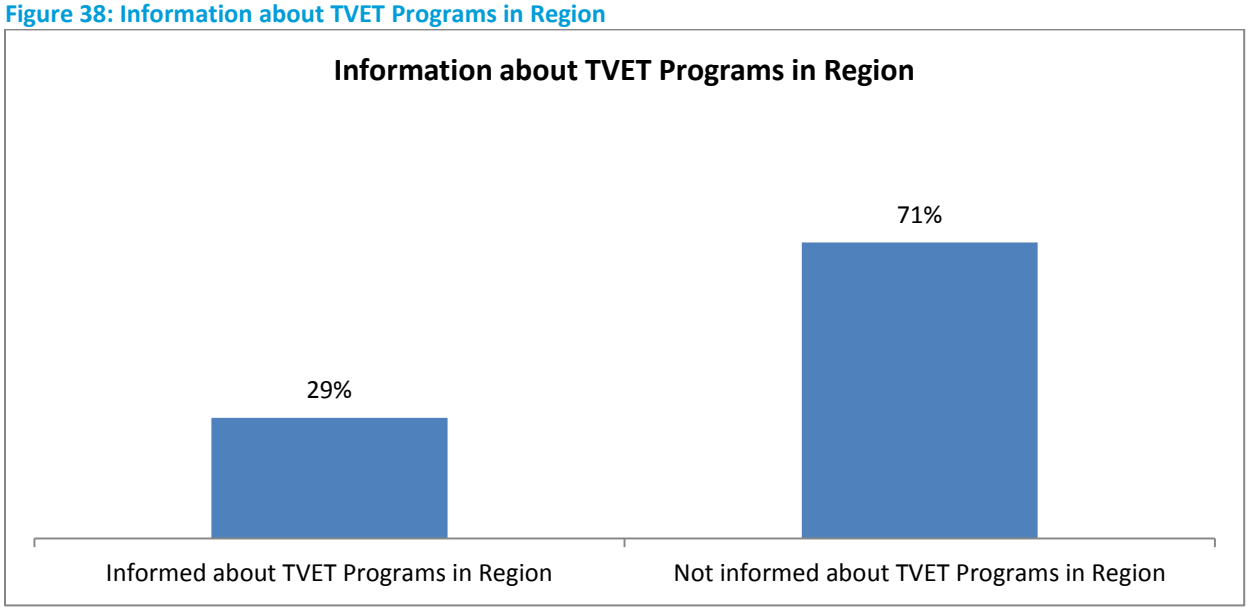
Figure 37: Set Budget for Training



12.8 Information about TVET courses and Source of information

Only 29% of the interviewed firms reported that they get regular information about TVET courses and activities in their region while 71% reported that they were not informed of any programs and initiatives.

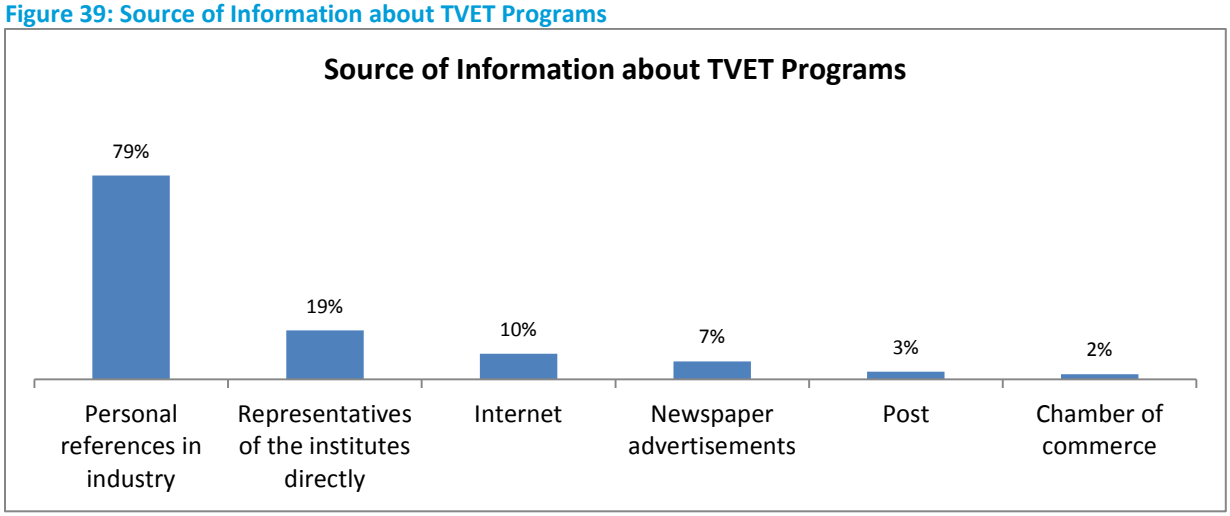
Figure 38: Information about TVET Programs in Region



N= 300 (All firms)

The firms which reported having received information about TVET programs were further asked about their source of information. The majority of firms (79%) were informed about the TVET programs through their personal references in the industry. Others (19%) received information from representatives of the institutes directly, 10% used the internet and 7% used newspaper advertisements. Only 2% of firms received information from the SCCI.

Figure 39: Source of Information about TVET Programs



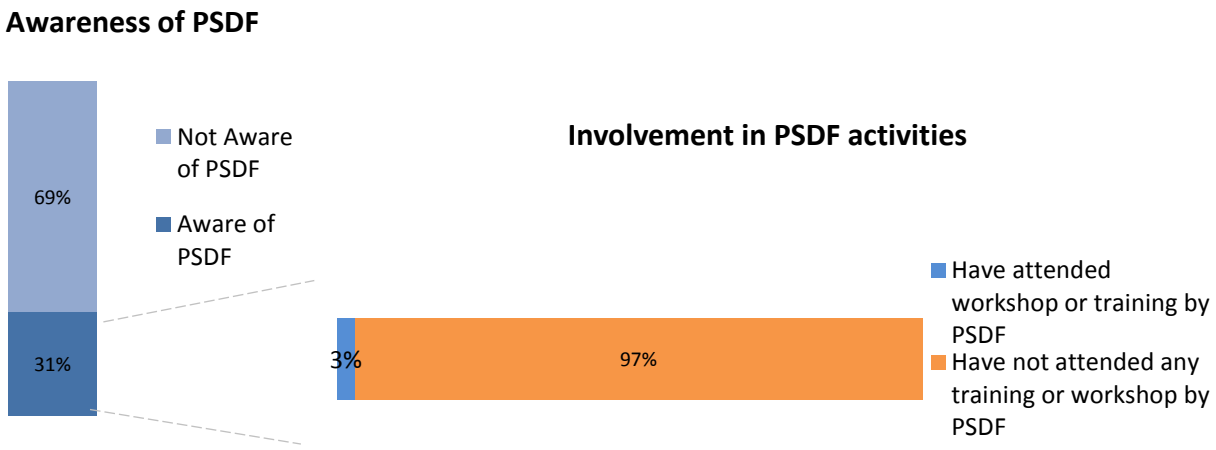
N= 81 (Firms which are informed about TVET programs)

13. TRAINING NEEDS ASSESSMENT

13.1 Awareness and Involvement with PSDF

Of the total firms interviewed, 31% were aware of the presence of PSDF and 3% had directly participated in a training or workshop activity conducted by the organization.

Figure 40: Awareness and Involvement with PSDF

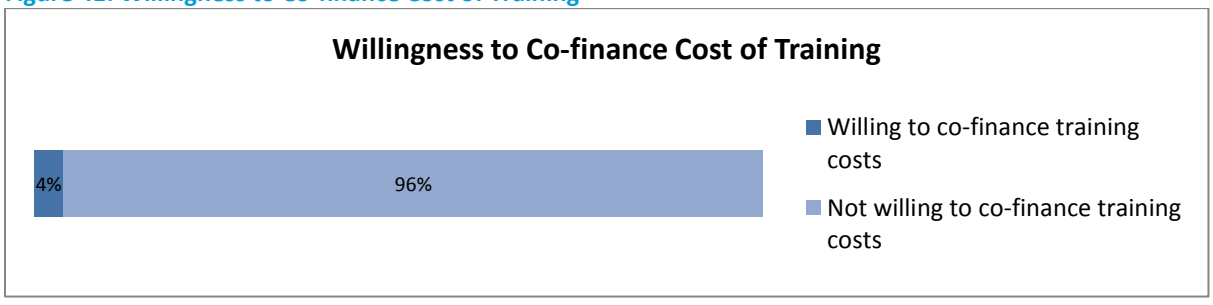


N= 300 (All firms)

13.2 Willingness to Co-finance Cost of Training

Interestingly, majority of the firms showed lack of willingness to co-finance the training of their employees in partnership with PSDF.

Figure 41: Willingness to Co-finance Cost of Training



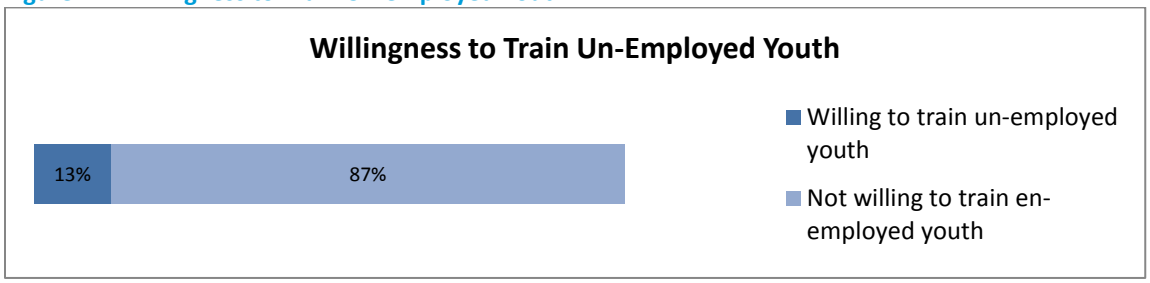
N= 300 (All Firms)

This observation can also be linked to the findings of previous questions where very few firms possess the budget for in-house or external training.

13.3 Willingness to Provide Training to Unemployed Workers

Firms were further asked if they were willing to provide training to un-employed workers in their manufacturing centers. Only 13% of the firms showed willingness while 87% showed reluctance to engage in such an initiative.

Figure 42: Willingness to Train Un-employed Youth

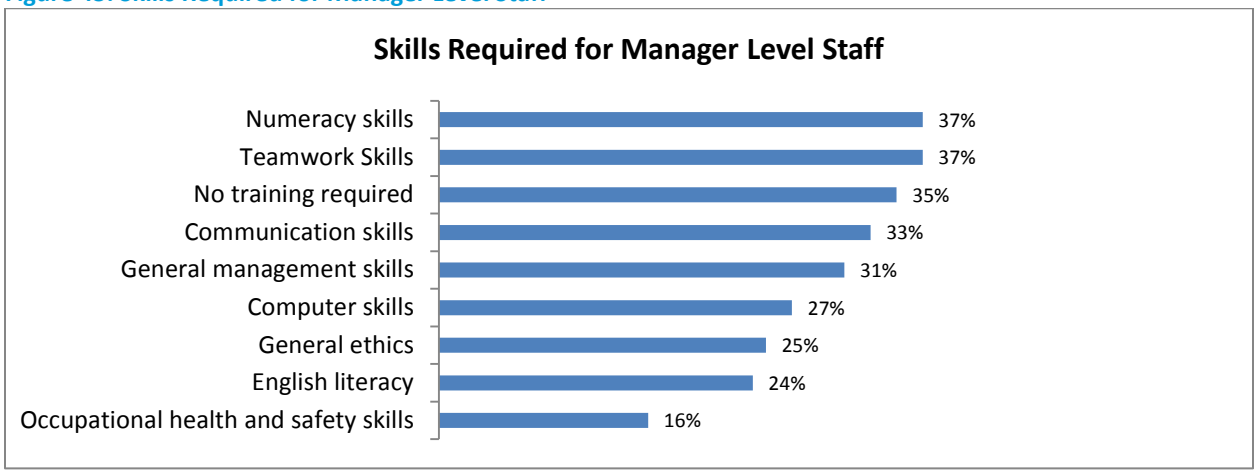


N= 300 (All Firms)

13.4 Skills Needed for Manager Level Staff

Firms were asked to identify the soft skills that their employees require training in. 35 percent of the firms reported that their managers required no training in this. Those who felt the need for skills training reported the highest need for Numeracy skills (37%) and Teamwork skills (37%).

Figure 43: Skills Required for Manager Level Staff

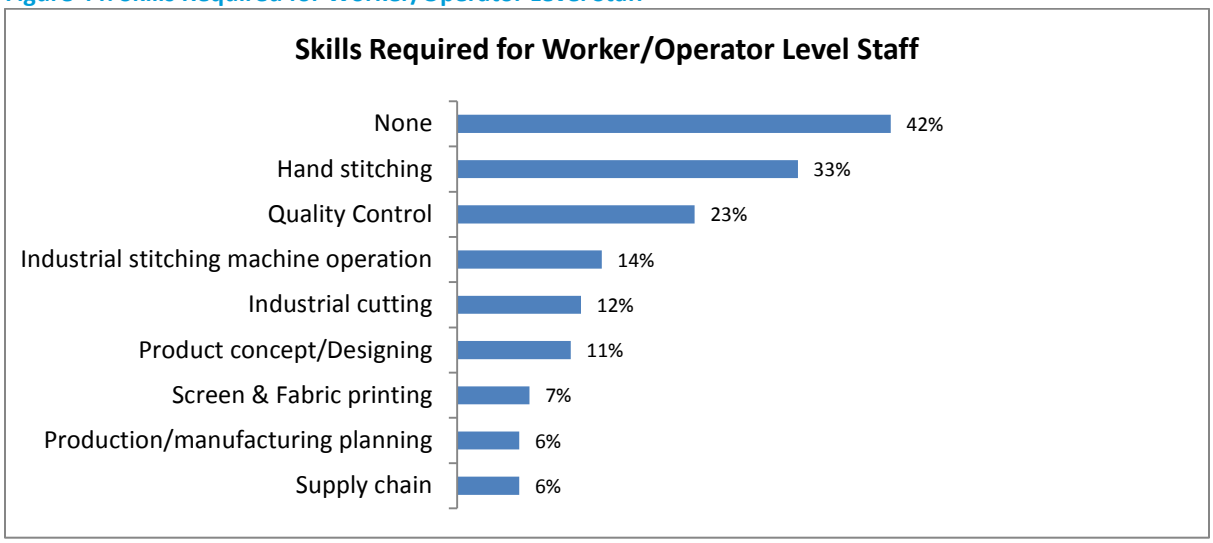


N= 300 (All firms)

13.5 Skills Needed for Worker/Operator Level Staff

At the worker level, 42% of the firms need no training for their staff. Hand stitching is needed by 33% of the firms while quality control is needed by 23% of the firms.

Figure 44: Skills Required for Worker/Operator Level Staff

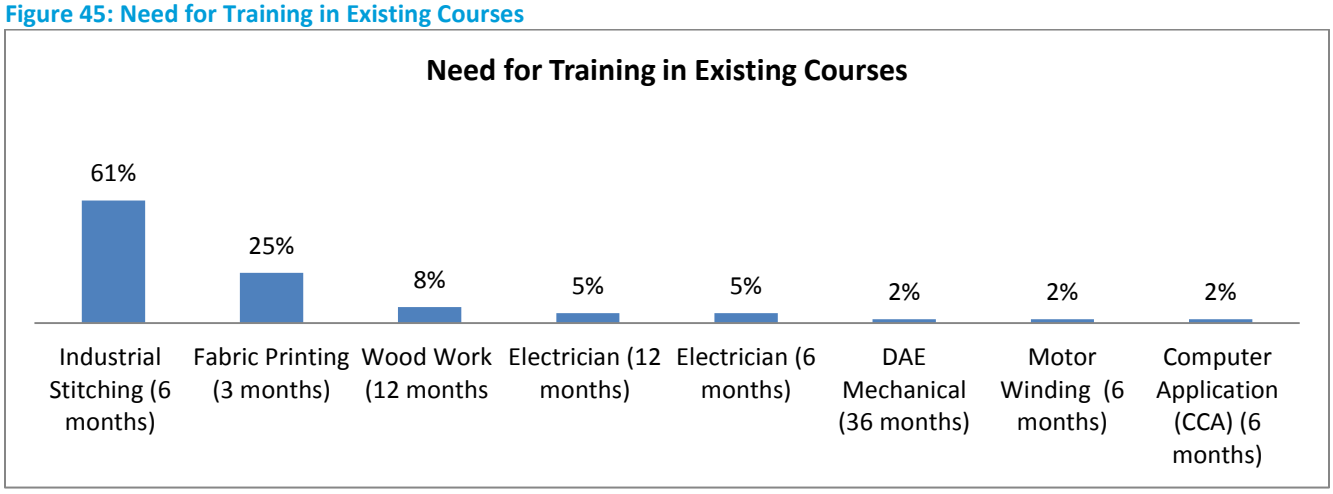


N= 300 (All firms)

13.6 Need for Training in Existing Available Courses

Currently, technical training institutes in Sialkot offer some courses that are directly or indirectly relevant to the sports goods manufacturing value chain. Firms were provided a list of these courses already available to the industry to determine areas where they need training for their workforce. Industrial stitching course was the most popular course, demanded by 61% of the total firms. Fabric printing was needed by 25% of the firms, especially those producing sports garments and gloves. It is interesting to note that in the previous question, only 33% had identified stitching need in workers. Once firms were presented a list of the available courses, this percentage jumped up high to industrial stitching (both inflatable balls and garments).

Figure 45: Need for Training in Existing Courses



N= 300 (All firms)

13.7 Need for New Training Courses

Table 22: Need for New Training Courses

Course	No. of employees (Cumulative of all firms)	Preferred Duration (Majority of Firms)
Industrial Stitching	130	3-6 months
Electrical Course	35	3 months
Fabric Printing	72	4 months
Woodwork & Wood cutting	50	6 months
General Management Skills (order processing and client dealing)	42	3 months
Fabric Cutting	22	2 months
Machine operator	33	3 months
Product Concept & Design	20	2 months

(N= 300 (All firms)

An open end question allowed firms to share the needs of training for their workforce. The most recommended course was industrial stitching, stated by 61% of the firms. Industrial stitching is already provided by TEVTA and Leather Products Development Institute (LPDI). However, the supply gap shows that firms have not been able to take advantage of the presence of these institutes.

Workforce Demand Projections for Sports Goods Manufacturing Sector of Pakistan

The survey identified the demand for technical workforce in the sports goods manufacturing sector over the next five years. The study questionnaire had collected information on the number of workers working under different trade skills/job titles. The establishments were inquired about the number of additional workers anticipated by them against key positions in form of vacancies. These were then combined with the existing employee base in the organizations to calculate the total demand for the 300 firms in the sample.

The sample drawn for the establishment survey was representative for the product category and formal and representation of formal and informal establishments. Therefore, it was generalized that the demands stated by the 300 interviewed establishments could be extrapolated for the industry level as well. In the first step, the total future demand for the sample firms were calculated. These were then multiplied by the factor of the total firms in the industry according to the product category.

In the inflatable ball category, secondary and primary sources stated that 650 firms were involved in production of the product. The sample contained 107 firms for which the total future demand was calculated against the key skill trades/job titles such as stitcher, bladder machine operator. These were then extrapolated to the 650 firms in the product category in industry. Likewise, this was done for each product category.

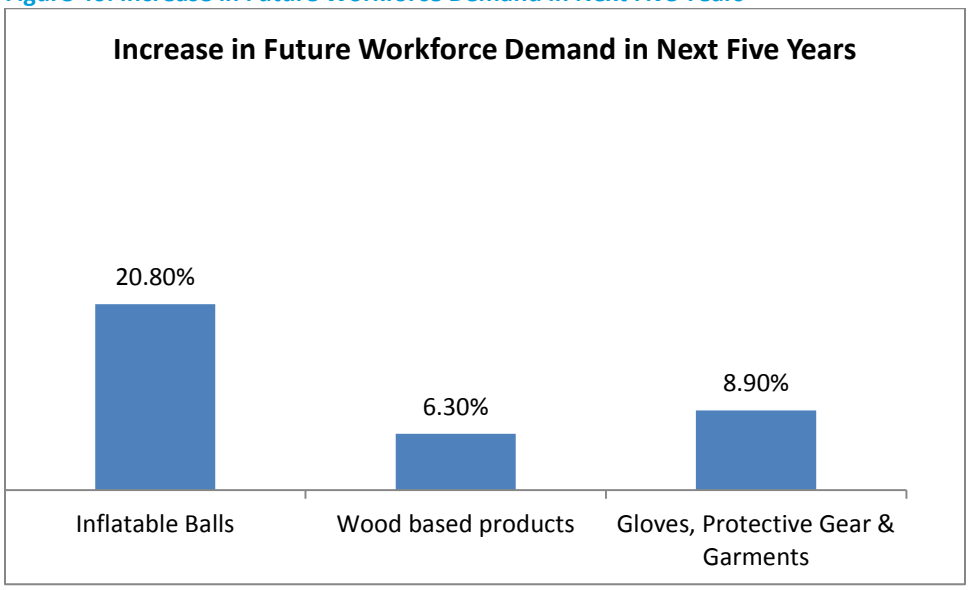
Table 23: Workforce Demand Projections for the Sector

Product Category	Firms in Sample	Firms in industry (Formal & Informal)	Title	Current Sample	Current Vacancies	Estimated Demand (3-5 years)	Total future demand of Sample (3-5 years)	Industry
Inflatable balls	107	650	Hand Stitcher	1984	54	230	2268	13,767
			Cutting worker	23	7	21	51	310
			Screen Printer	15	3	13	31	188
			Bladder Machine Operator	10	19	19	48	291
			Machine Stitcher	571	102	80	753	4,571
			Sales Boy	20	2	20	42	255
			Packer	250	10	10	270	1639
			Merchandiser	15	5	6	26	158
Wood based products	35	200	Wood Jointer	365	6	12	383	2189
			Sampler	15	8	12	35	194
			Saw machine operator	279	12	13	304	1689
			Lamination worker	71	4	2	77	428
			Polish workers	250	5	12	267	1483
			Blade shaper	300	5	5	310	1722

			Packer	398	2	6	406	2256
			Bat handle turner	194	8	6	208	1156
Gloves, Protective Gear & Garments	174	1150	Machine stitcher	3576	204	194	3974	26265
			Screen Printer	211	2	4	217	1434
			Packer	1142	20	20	1182	7812
			Finishing worker	200	8	8	216	1428
			Pattern maker	67	8	4	79	522
			Cutting worker	195	2	5	202	1335
Composite Products	34	40	Mold Master	6	3	5	14	93
			Tube machine workers	5	4	7	16	106
Total	350	2040		10,157	499	714	11,370	71,183

Based on this, the total technical workforce demand for the next five years for the Sports Goods Manufacturing Sector stands at **71,183**.

Figure 46: Increase in Future Workforce Demand in Next Five Years



[83]

Analysis of the growth in workforce demand by the industry sub sectors show that the inflatable ball sub sector is likely to experience the highest percentage growth followed by Gloves, Protective Gear and Garments sector.

[83] Composite based products are not added because of low base of demand figure. The total number of firms offering composite based products stands at 34. However, all of these firms manufacture wood based products as well and share resources across the products.

CONCLUSION AND RECOMMENDATION

14. CONCLUSION AND RECOMMENDATIONS

14.1 Conclusion

Sialkot with 130 years history of sports goods manufacturing presently hosts more than 1,500 permanent units with a base of around 55,000 workers. The units are engaged in manufacturing of inflatable balls, sports gloves and other protective gears, wooden products, composite-based products, sportswear and several other sports products. The city with around US$364 million annual export of sports goods assumes the status of global supply hub for football and other sports products. However, the sector is plagued with production challenges in face of growing competition from other countries around the globe.

Globally, mechanized manufacturing has already replaced manual work. This has not only reduced the costs for the firms but has helped with consistent quality in products. The sports goods manufacturing sector of Pakistan has a lot of catching up to do in this regard. Almost half of the firms (45%) feel that the industry is moving towards mechanized can push the production levels and quality and is enabled for the changing dynamics of the manufacturing sector. Skill training in the sector is largely reliant on traditional *ustaad* & *shagird* system. The labour skill shortages can be attributed to the lack of training institutes in the region and pervasiveness of small sized informal units which have no training budget and scope for their employees.

There are 36 institutes of technical and vocational training located in Sialkot and Narowal districts, run by various bodies including TEVTA, PVTC, TUSDEC, LPDI and private sector institutes. Out of almost 85 courses taught in these institutes, only 15 (i.e. 18%) are directly related to sports goods industry. Furthermore, the inclination of manufacturing firms towards direct recruitment from training institutions is low. Only 15% firms recruit directly from institutions. Only 70-80 large and progressive sports goods producers possess inclination towards skilled workers qualified from TVET institutes, while medium and small sized companies still prefer the conventional master-helper system. The number of firms with in-house formal training departments is negligible.

Out of the firms covered in the study, 61% feel that their staff needs training for industrial stitching followed by 25% of those who need fabric painting courses. The analysis of production processes of various sub-sectors indicates the need of courses in almost 20 trades or skills. Some of these courses are already being offered at existing TVET institutes, while the rest are completely unexplored. The most recommended trades are Screen Printing and Graphic Designing, Sublimation Printing, Rubber Technology, Pattern Making, Gloves Machine Stitching, Composite Technology, Digital Marketing and Lean Production System. The recommendations section includes details of the needed courses, skills and the various options available for collaboration by PSDF in the area.

14.2 Recommendations

The study reveals a lack of awareness on part of small and medium establishments about formal training courses offered by Training Service Providers (TSPs). A part of this can be attributed to the fact that the TSPs operating currently in Sialkot offer very few courses which are directly related to the sector. Based on expert interviews and the establishment survey, the following courses and their duration are being recommended:

Table 24: Technical Courses Needed in Various Segments of Sector

Segment	Suggested Course	Suggested Duration	Already taught at
Football and Protective Gears	Screen Printing and Graphic Designing	6 months	VTI
	Sublimation Printing Machine Operator (Future need)	6 months	-
Football	Football Material Assessment and Procurement	3 months	-
	Rubber Technologist for Bladder	6 months	-
	Football Inspection / QA	3 months	-
	Football Machine Stitching	3 months	-
	Yarn Winding Machine Operator	3 months	-
Wooden products	Bat making / Woodworking [Covering all aspects of Wooden Products]	6 months	-
Gloves and Other Protective Gears	Gloves Material Assessment and Procurement	3 months	-
	Computerized Pattern Maker	6 months	VTI, and LPDI
	Gloves Machine Stitching	6 months	LPDI
	Gloves Inspection / QA	3 months	-
Composite-Based Products	Composite Material Assessment and Procurement	3 months	-
	Composite Hockey Mold Master	6 months	-
	Composite Technology	6 months	-
	Composite Products Inspection / QA	3 months	-

14.3 Professional Courses Needed

The following professional courses can be launched for the skill development in sports goods sector:

Table 25: Professional Courses Needed By Sector

Suggested Course	Suggested Duration	Already taught at
Import and Export Documentation	6 months	-
Accounting Software Operator	6 months	-
Production Planning and Control (PPC)	6 months	VTI and LPDI
Merchandizing Management Techniques	6 months	LPDI
Digital Marketing	3 months	-
Lean Production System (Future need)	3 months	-

For PSDF, keeping in mind its mandate, the following recommendations can be made:

Increased awareness: The awareness of PSDF and its activities in the sector stands at 31% among establishment firms. Considering this percentage, it is recommended that PSDF engage in activities which highlight its role and interacting more with the sector associations and firms. Workshops, seminars and frequent newsletters to sector associations and experts can help in increasing levels if awareness and its mandate.

Suggested Initiatives:

1) **Strengthen link between associations and establishments**

PSDP can play an important role in bridging the gap between the sector associations and the individual establishments. Currently, there is a lack of single platform for the industry stakeholders to interact with the establishments and to launch targeted programs based on their needs. To do so, PSDF can act as the engagement platform for these associations and also for the TSPS including TEVTA, PVTC VTI, LPDI, SIDC and PSGMEA. The recommended courses from the study can be presented to these TSPS to gain consensus on the future strategy and targeted mutual effort on raising sector skills. Currently these TSPs offer very few training courses related to the sports foods manufacturing sector. PSDF can play its part in helping introduce recommended courses for the sector.

2) **Subsidize cost of training**

As the survey results indicate, very few of the firms (4%) have a budget for training their existing employees. The trainees opting for technical and vocational courses are mostly from lower to middle income segments who find it difficult to bear the costs of training, especially at private institutes. TSPs duly highlighted the constraint faced by students in bearing the fee. In order to encourage trained and skilled workforce in the industry, PSDF can provide stipends to the trainees which will eventually reflect in an increased profile of workforce for the industry with certified qualifications.

3) Bridge the placement gap between TSPs and industry

Only 15% of the establishments reported hiring directly from TSPs. PSDF can play an important role in increasing the placement opportunities for students graduating from TSPs into the industry. However, in order to do so, the first step is the introduction of the relevant courses at the TSP level.

4) Training of trainers for setting Industry benchmarks

In order to kick start the relevant courses in the industry and set high standards of training, PSDF can arrange for master classes of training of trainers from key TSPs, training them through international and national expertise, keeping in mind the future trends in production. This will help in kick starting the training culture in the industry and in setting high standards to start from.

For all of the above recommendations, close collaboration with the existing TSPs is necessary in order to reduce duplication of efforts and ensure increased synergy in the industry. The collaboration options that PSDF may explore have been suggested below:

Collaboration with TEVTA	TEVTA campuses can be utilized for launching the desired courses. As the capacity in the morning shift is almost fully utilized, the arrangements can be made for the classes in the second shift. Also the huge campuses of the two under-construction GCTs in Narowal can also be utilized.
Collaboration with PVTC VTI	PVTC's VTI at Small Industrial Estate Sialkot has the longest experience in handling sports goods related courses. Their own venture seems to be quite successful in all respects. Collaboration can be made with VTI for new classes in the existing campus in 2nd shift or arrangements can be made for extended construction in the building or establishment of a separate campus. The present good image of VTI among the students and employers coupled with managerial and technical support by the experienced people can contribute towards success of PSDF program in Sialkot.
Collaboration with LPDI	The existing courses offered by LPDI can be sponsored by PSDF or more courses can be launched mutually in LPDI building at Defence Road Sialkot. This arrangement will bring in the support of PGMEA as well that will bridge the gap between the academia and the industry.
Collaboration with SIDC	SMEDA's SIDC premises on Daska Road hosts a campus where classes are planned for future. Collaboration can be made with SMEDA for the joint venture where the existing training facilities of SIDC will be used to launch the desired courses. The huge development and production facilities for thermo-bonded ball at SIDC will also fill the purpose of practical training and OJT on a single location. The support of SSCI and PSGMEA can also be sought for any skill development program at SIDC. This seems to be the best option among all.

Collaboration with PSGMEA	PSGMEA has a plan of establishing a training facility in the new building at its new vast office building at SIE Sialkot. If such training facility is set up in future, PSDF can make collaboration with PSGMEA for the training courses there. The collaborative program will also help better OJT and placement for the students at PSGMEA member establishments.

"It would be wise if some existing facility is used instead of making heavy investment in a new facility. We also intend to establish an institute on upper floors of our association building. PSDF can talk to us for any joint initiative. SIDC premises can also be used for this purpose." Muhammad Naseer, President PSGMEA

15. ANNEXURES

15.1 Sector Stakeholders

Stakeholders at Demand and Supply Side					
S. No.	**Organization**	**Contact Person**	**Designation**	**Contact Detail**	**Type**
1	Sialkot Chamber of Commerce and Industry (SCCI)	Mr. Fazal Jilani	President	Shahrah-e-Aiwan-e-Sanat-o-Tijarat (Paris Road), Sialkot 052-4261881-3 Fax: 052-4268835, 4267919 Email: sialkot@scci.com.pk	Chambers of Commerce
2	Pakistan Sports Goods Manufacturers and Exporters Association (PSGMEA)	Mr. Muhammad Naseer	President	PSGMEA Building, 60-A, Hall Road, SIE, Sialkot Phone: 052-3256945, 0300-6107436 Fax: 052-3256920 Email: psgmea@gmail.com	Trade Association
3	Pakistan Gloves Manufacturers and Exporters Association (PSGMEA)	Mr. Muhammad Younis	Chairman	PGMEA Building, Kashmir Road, Sialkot Phone: 052-4291657, 4273870, 4272959 Fax: 052-4274860 Email: pgmea@brian.net.pk	Trade Association
4	Pakistan Readymade Garments Manufacturers and Exporters Association – Sialkot Chapter	Mr. Muhammad Naeem	Incharge	Oberoy Sports Building, Near Muslim League House, Sialkot Phone: 052-4597128 Fax: 052-4592683 Email: info-skt@prgmea.org	Trade Association
5	Trade Development Authority of Pakistan (TDAP) – Sialkot	Mr. Basit Rauf	Director	Muslim Colony, Gohadpur Road, Sialkot Phone: 052- 4261130 Fax: 052- 4261131 Email: tdap.skt@tdap.gov.pk	Export facilitation centre
6	Sialkot Business and Commerce Centre (SBCC) [Under construction]	Mr. Ammad Zafar Dar	Project Director	Shahrah-e-Aiwan-e-Sanat-o-Tijarat (Paris Road), Sialkot Phone: 052-4263305 Email: ammardar@gmail.com	Business facilitation centre
7	Small and Medium Enterprise Development Authority (SMEDA)	Mr. Fouzan Muhammad	Manager RBC Sialkot	SCCI Building, Shahrah-e-Aiwan-e-Sanat-o-Tijarat, Sialkot Phone: 052-4291881 Fax: 052-4268835 Email: fouzan@smeda.org.pk	Industry Support Body
8	Punjab Small	Mr. Muhammad Ejaz	DDO	Small Industrial Estate, Sialkot	Industry Support

	Industries Corporation (PSIC)	Khan		Phone: 052-3562860, 0333-8707077	Body
9	Industrial Development Centre on Composite Based Material for Sports Goods	Mr. Ishaq Mughal	Project Incharge	Small Industrial Estate, Sialkot Phone: 052-3562860, 0322-4914113	Industry Support Body / Common Facility
10	TEVTA District Office	Mr. Amjad Ilahi	District Manager	Metal Industry Development Centre, Allama Iqbal Road, Sialkot Cantt. Phone: 052-4566129, 4355966	TSP
11	Leather Products Development Institute (LPDI)	Mr. Arshad Mahmood Mirza	Project Manager	Allama Iqbal Town, Defence Road, Sialkot Phone: 052-3550590, 3257266, 3505457, 0333-8615906 Fax: 052-3561139	TSP
12	National Institute of Design and Analysis (NIDA) [Under TUSDEC]	Matloob Hussain	Incharge	424-Opoosite Mehar CNG Station, Khadim Ali Road, Sialkot Phone: 052-3577321-22, 0345 9494711 Email: matloobhussain78@yahoo.com	TSP
13	Sports Industry Development Centre (SIDC)	Mr. Muhammad Sarwar Hanif	Project Director	14km, Moatra, Near Imam Bukhari University, Sialkot Road, Daska Phone: 052-6227309-10 Fax: 052-6227311 Email: sarwar.hanif@smeda.org.pk	Industry Development + TSP
14	Regional Directorate of Apprentices Training	Mr. Sarwar Bhalli	Director	Marala Road, Sialkot Phone: 052-4296092, 0300-6146201	OJT Execution and Monitoring Body
15	Independent Monitoring Association for Child Labour (IMAC) [Monitoring inflatable ball industry in Sialkot]	Mr. Nasir Dogar	CEO	Naushahi House, Al-Hadi Town, Defence Road, Sialkot Phone: 052-3554871 Fax: 052-3559571 Email: imac@imacpak.org	Monitoring Body
16	Child and Social Development Organization of SSCI (CSDO) [Working on social issues in sports goods and other sectors of Sialkot]	Mr. Ejaz Ahmad	Project Manager	SCCI Building, Shahrah-e-Aiwan-e-Sanat-o-Tijarat, Sialkot Phone: 052- 4274781, 4290508 Fax: 052- 4290508 Email: info@csdopak.org	Supporting body + TSP

15.2 List of Training Service Providers

S. No.	Organization	Respondent Name	Designation	Contact Detail
1.	Sports Industry Development Centre (SIDC)	Mr. Muhammad Nasir	Manager Academics	14km, Moatra, Near Imam Bukhari University, Sialkot Road, Daska Phone: 052-6227309-10
2.	Sports Industry Development Centre (SIDC)	Mr. Muhammad Sarwar Hanif	Project Director	14km, Moatra, Near Imam Bukhari University, Sialkot Road, Daska Phone: 052-6227309-10, 0300-5528285 Email: sarwar.hanif@smeda.com
3.	Small & Medium Enterprise Development Authority (SMEDA)	Mr. Fouzan Muhammad	Manager RBC Sialkot	SCCI Building, Shahrah-e-Aiwan-e-Sanat-o-Tijara Sialkot Phone: 052-4291881
4.	Punjab Small Industries Corporation (PSIC)	Mr. Muhammad Ejaz Khan	DDO	Small Industrial Estate, Sialkot Phone: 052-3562860, 0333-8707077
5.	Industrial Development Centre on Composite Based Material for Sports Goods	Mr. Ishaq Mughal	Project Incharge	Small Industrial Estate, Sialkot Phone: 052-3562860, 0322-4914113
6.	Child & Social Development Organization of SSCI [Working on social issues in sports goods and other sectors of Sialkot]	Mr. Ejaz Ahmad	Project Manager	SCCI Building, Shahrah-e-Aiwan-e-Sanat-o-Tijara Sialkot Phone: 052- 4274781, 4290508
7.	Independent Monitoring Association for Child Labor (IMAC) [Monitoring inflatable ball industry in Sialkot]	Mr. Nasir Dogar	CEO	Naushahi House, Al-Hadi Town, Defence Road, Sialkot Phone: 052-3554871
8.	Vocational Training Institute (VTI)	Mr. Muhammad Imran	OJT & Placement Officer	Roundabout Small Industrial Estate, Sialkot Phone: 052-3562708,
9.	Regional Directorate of Apprentices Training	Mr. Waris Ali Bajwa	Placement Office	Marala Road, Sialkot Phone: 052-4296092, 0334-4296542
10.	Regional Directorate of Apprentices	Mr. Amin Amir	Assistant Director	Marala Road, Sialkot Phone: 052-4296092, 0334-4296541

	Training			
11.	Vocational Training Institute	Mr. Tariq Mehmood	Principal	Village Khan Marakkah, Tehsil Shakargarh Distri Narowal. Phone: 0542-539461, 619581, 0300-4284710
12.	Vocational Training Institute	Mr. Kashif Shabbir Rana	Principal	Rasool Nagar,Circular Road, ,Narowal Phone: 0542-413322
13.	Government Apprentices Training Centre (ATC)	Mr. Saeed Anwar	Principal	Marala Road, Sialkot Phone: 052-4564289, 0321-7183876.
14.	Government College of Technology for male (GCT)	Mr. Inam Ullah	Principal	Paris Road, Sialkot Phone: 052-9250199-200, 0331-6681027
15.	Vocational Training Institute (VTI)	Mr. Naeem Sohail	Principal	Roundabout Small Industrial Estate, Sialkot Phone: 052-3562708, 0300-6160709
16.	Government Technical Training Centre for female (GTTC) Sambarial	Ms. Hajra Aslam	Principal	Near Govt. Islamia High School, Babu Ghulam N Road, Samberial, District Sialkot 052-6523256, 0333-4511373
17.	Government Technical Training Centre for male (GTTC) Zafarwal	Mr. Amanat Ali	Principal	Chawinda Road, Zafarwal District Narowal Phone: 0542-539100, 0345-5674706
18.	Government Technical Training Centre for male (GTTC) Narowal	Mr. Sultan Mahmood	Principal	Reader Wali Gali, Abbas Nagar, Circular Road, Narowal 0542-413273, 0300-7771102
19.	Government Technical Training Centre for male (GTTC) Pasrur	Mr. Asmat Ullah	Principal	Faisal Colony. Pasrur, District Sialkot Phone: 052-6442776
20.	Government Technical Training Centre for male (GTTC) Sambarial	Mirza Muhammad Nadeem	Principal	Butcher Khana Road, Near Food Palace, Sambria District Sialkot Phone: 052-6523255, 0300-6409585
21.	Government Technical Training Centre for male (GTTC) Shakargarh	Mr. Muhammad Latif	Principal	Zia Road, Shakargarh, District Narowal 0542-453119, 0300-7765574
22.	Government Vocational Training Institute for women (GVTI) Daska	Ms. Nargis Umar	Principal	Circular Road, Daska Phone: 052-9200033, 0340-4119597
23.	Government Vocational Training Institute for women (GVTI) Narowal	Ms. Sadia Nadeem	Principal	Nat Street, Nagar, Circular Road, Narowal Phone: 0542-412195, 0300-7760349
24.	Government	Ms. Sajjad Akhter	Principal	Noorkot, Tehsil Shakar Garh, Distt. Narowal

	Vocational Training Institute for women (GVTI) Noorkot			Phone: 0542-430546, 0305-4236831
25.	Government Vocational Training Institute for women (GVTI) Pasrur	Ms. Fareeha Nayyar	Principal	Muhallah Inayat Pura, Pasrur, District Sialkot Phone: 052-6441922, 0336-6441922
26.	Government Vocational Training Institute for women (GVTI) Shakargarh	Ms. Robina Malik	Principal	Riaz Pura, Near Riaz Hospital, Shakar Garh, Distt Sialkot Phone: 0542-450119, 0300-7457969
27.	Government Vocational Training Institute for women (GVTI) Sialkot	Ms. Tahira Kausar	Principal	Paris Road, Sialkot Phone: 052-9250421, 0300-6179964
28.	TEVTA District Office	Mr. Amjad Ilahi	District Manager	Metal Industry Development Centre, Allama Iqb Road, Sialkot Cantt. Phone: 052-4566129, 4355966
29.	TEVTA Zonal Office	Mr. Tahir Mehmood	AMT, ZMO	Inside Govt. Science College, Wahdat Road, Lah Phone: 042-99239017, 0333-4286907
30.	Sialkot College of Technology	Professor Abdul Hameed	Principal	Chowk Kotli Behram, Khadim Ali Road, Sialkot Phone: 052-4294090, 0300-9619255
31.	Standard Polytechnic Institute	Engineer Ch. Muhammad Latif	Principal	Khadim Ali Road, Near Hari Masjid, Sialkot Phone: 052-4290294, 0321-9618900
32.	Trigon College of Technology	Mr. Abdur Rehman	Principal	Katchehri Road, Near Rescure 1122, Sialkot 052-4265317, 0300-6181882

15.3 List of Sector Experts

S. No.	Organization	Respondent Name	Designation	Contact Detail
1.	Pakistan Sports Goods Manufacturers & Exporters Association (PSGMEA)	Mr. Muhammad Naseer	President	PSGMEA Building, 60-A, Hall Road, SIE, Sialkot Phone: 052-3256945, 0300-6107436
2.	Pakistan Sports Goods Manufacturers & Exporters Association (PSGMEA)	Mr. Sohail Yaqub Mehr	Ex-President and existing member Central Executive Council PSGMEA, Ex Secretary General PHMEA	PSGMEA Building, 60-A, Hall Road, SIE, Sialkot Phone: 052-3256945
3.	Atlas Sports Ltd.	Mr. Taj-ud-Din	CEO	17/5, Noor Pura, Khadim Ali Road, Sialkot Phone: 052-4580661
4.	Exquisite Sports	Mr. Mohammad Yasin	Proprietor	Islamia Park, Premnagar, Sialkot Phone: 4589001
5.	Matsa Enterprises	Mr. Shahid Mehmood	Proprietor	Noul, Harrar, Wazirabad Road, Sialkot Phone: 3560031-2
6.	Yousaf Nawab International	Mr. Adnan Yousaf	Proprietor	Behind Union Council Bonkan Road Pacca Garha Sialkot Phone: 052-3250662
7.	AHS Sports	Mr. Muhammad Arshad	Proprietor	Zafarwal Road Kishne Wali Kothey, Sialkot

				Phone: 052-3543904, 3543064,
8.	FHA Industries	Mr. Akhtar Iqbal	Proprietor	9km Daska Road, Sialkot Phone: 052-3524209, 4592052
9.	Comet Sports	Mr. Muhammad Sajid	Finance Manager	Plot No. 57-59 S.I.E Sialkot Phone: 052-3252001-4, 0334-8031690
10.	Khalid Overseas Corporation / Turf Sports	Mr. Rizwan Ashraf	Finance Manager	Small Industrial Estate, Sialkot Phone: 052-3555063, 3552091, 3550055, 0321-6191400
11.	Multiiple Sports	Mr. Khurram Raza	Proprietor	Jammu Road, Dilowali, Sialkot Phone: 0321-6179865
12.	NK Sports	Mr. Kashif Mahmood	Proprietor	122-Kareem Centre, Bank Road, Sialkot Phone: 0300-6102602
13.	Rimpa International	Mr. Sheikh Khurram Shahzad	Proprietor	Nekapura, Sialkot Phone: 052- 4586624, 0321-6162945
14.	Sahara Sports	Mr. Rafaqat Hussain	Proprietor	Chawinda Road, Pasrur Phone: 0303-9568279
15.	Vision Technologies Corporation Ltd.	Mr. Muhammad Shafiq	Production Manager	Technology Drive, 14 km, Pasrur Road, Sialkot Phone: 052-3549393, 0345-6836342
16.	Tanvir Rubber Works	Tanvir Ahmed	Proprietor	Capital Road, Opp. Dodi Surgical Industry, Sialko Phone: 052-4291789, 4291790, 0300-7112060
17.	Umar Bilal Industry / ISI International	Mr. Aziz Bilal	Proprietor	Pasrur Road, Nai Abadi, Noor Pura, Sialkot
18.	Ambassador Sports	Mr. Bilal Umer Sheikh	Director	Mujahid Road, Sialkot
19.	Madrigal Sports	Mr. Syed Ammar Hyder	HR Manager	Ghuinki, Daska Road, Sialkot Phone: 052-6527156-8, 0333-8333449
20.	Talon Sports	Mr. Asad Bajwa	General Manager	Daska Road, Sialkot Phone: 052-6526633, 6526644, 0300-8712053
21.	Capital Sports Corporation Ltd.	Dr. Noman Idris Butt	CEO [Ex-President SCCI]	Kashmir Road, Sialkot Phone: 052-4265831, 4265833, 0300-8616575
22.	Fox & Associates (Group of Companies)	Mr. Zia ur Rehman Choudhry	CEO [Ex-President PGMEA]	5km, Daska Road, Sialkot Phone: 052-3552651-2, 3550485, 0300-861024
23.	M. Zaheer Sports	Malik Asad Ali	Proprietor	St. 2, Deputy Bagh, Sialkot Phone: 052-4597430, 4600630, 0331-1436055
24.	Challenge International	Shahzad Sheikh	Proprietor	Challenge House 4-A/1 Baber Road, Sialkot Cant Phone: 052-3253875
25.	B.A. Sports	Mr. Muhammad Idris	Proprietor	New Town, Opposite Yaquob Street, Sialkot Phone: 052-3522444, 0301-6144117
26.	Blue Bell Industries	Mr. Javed Rashid	Proprietor	4-Tahir Street Defence Road Near Bashir Petrol Pump, Sialkot Phone: 052-3555982
27.	Heraldic Industries	Muhammad Ilyas	Proprietor	Din Pura, Link Capital Road, Sialkot Phone: 052-523559010-2
28.	Saddique Group Industry	Muhammad Akhtar	Proprietor	Mallper, Sialkot Cantt Sialkot Phone: 052-3206159
29.	Affix Industries	Mr. Shahjahan Habib	Proprietor	Barlas Street,Pacca Garah, Sialkot Phone: 4261317
30.	Al-Imran Industries	Mr. Imran Ashraf	Partner	Daska Road,Haji Pura,Fahad Munir Enterprises,M Pull Aaik, Sialkot Phone: 052-3559426
31.	Welsons Enterprises	Mr. Mubashar Soni	Director	16/59, Power House, Sialkot Phone: 052 3254708
32.	Akhtar Yousaf Trading Company / Top Fight	Mr. Muhammad Akhtar	CEO	Near Army Dairy Farm, Dalowai Road, Sialkot Phone: 052-3205716, 052-3205717, 0321-6113

33.	AMK Sports	Mr. Amer Kapur	CEO	Raja Road, Sialkot Phone: 052-4591466, 4586065, 0346-8223382
34.	Astaks Moto	Mr. Nasir Ali	Proprietor	Jammu Road, Dallowali, Sialkot
35.	Gold Panel	Mr. Muhammad Shoaib	Production Manager	Pasrur Road , Lakhan Pur Square, Sialkot Phone: 3540006, 3540007, 0308-6185101
36.	Honey Sports	Mr. Javed Iqbal	Proprietor	Mubarik Pura, Near Old Sabzi Mandi, Khadim Al Road, Sialkot Phone: 0332-7080501
37.	Iqbal Sports / IS Sports	Mr. Sh. Amin Iqbal	Proprietor	Bank Road, Sialkot Phone: 052-4597375, 0300-9612226
38.	Jaffson Enterprises Ltd.	Mr. Muhammad Imran	Assistant General Manager	Saleeen Town, Pasrur Road, Sialkot Phone: 052-3542901, 3542902, 0341-9347155
39.	Khas Gloves Ltd.	Mr. Ansar Ali	Production Supervisor [Prominent pattern maker and alumnus of LPDI]	Daska Road, Sialkot Phone: 0331-6134912
40.	Mellow Industries Ltd.	Mr. Mubariz Chaudhry	CEO	Fazalabad, Daska Road, Sialkot Phone: 052-3552550-2, 0300-8610557
41.	Muhammad Younas Gloves Maker	Muhammad Younas	Proprietor	Haji Pura Road, Near CA Sports, Sialkot Phone: 0333-8629806
42.	Obaid Sports	Mr. Akhtar Adil	Proprietor	Jammu Road, Dalowali, Sialkot Phone: 052-3205722, 0321-7122745
43.	Oriental Martial Arts	Mr. Mola Hassan	Proprietor	College Road, Drunmmanwala Chowl, Sialkot Phone: 0300-6150576
44.	Penna Overseas Corporation	Mirza Muhammad Waqas	HR Manager	12 km, Daska Road, Sialkot Phone: 052-3524301, 0333-3633330
45.	Qaisar Glovers Maker	Mr. Qaisar Mahmood	Proprietor	Yousaf Market, Tehsil Bazar, Near CIA Staff, Sial Phone: 0300-7103220
46.	QD Sports / Quadri Sports	Mr. Saleem Akhter	Proprietor	Bank Road, Sialkot Phone: 052-4567586, 4567200, 0346-6616686
47.	Syndic Sports	Mr. Safeer Badar	Proprietor	Allama Iqbal Street, Sialkot Phone: 0432-611995, 0300-6157410
48.	Top In Town Sports Company	Mr. Muhammad Ahmad	Proprietor	11-Neka Pura, Sialkot Phone: 052-3543498, 4002047, 0324-6465555
49.	Zulfeqar Gloves Maker	Mr. Zulfeqar Amjad	Proprietor	Haji Pura Road, Near CA Sports, Sialkot Phone: 0300-6104873
50.	M.N. Group of Industries	Ch. Muhammad Adnan	Partner	Main Jammu Road, Dallowali, Sialkot Phone: 052-3205285, 03212-7877885
51.	Unik Products	Mr. Javed Tahir	Manager Finance	Saidpur Road, Pulli Topekhana, Sialkot Phone: 052-4295422, 0333-6836786
52.	Inter Corp. Ltd.	Mr. Javed Sandal	CEO [Ex-Vice President PSGMEA]	75-77/B, Industrial Estate, Sialkot Phone: 0432-553277, 0300-8613277
53.	Freeman Sports	Mr. Khalid Javed	Proprietor	Mubarik Pura, Sialkot Phone: 052-3556538, 0300-8616538
54.	H. Skills Sports	Sheikh M. Tariq	Proprietor	617, S.I.E, Sialkot Phone: 052-
55.	Asim Sports Industries (AM brand bats)	Mr. Mirza Mazhar Javed, Proprietor	Proprietor	Doburji Malian, Defence Road, Pasrur Road, Sial Phone: 052-3553542, 3561097
56.	Hamza Sports	Mr. Tariq Mahmood	Proprietor	Daska Road, Near 1122 Office, Sialkot Phone: 0300-6126496
57.	Malik Bat	Mr. Malik Hidayat	Proprietor	Near Sardar Begum Hospital, Shahabpura, Sialko Phone: 0300-7151635

58.	Naqqash Sports	Mr. Muhammad Naqqash	Proprietor	Koorpur, Airport Road, Sialkot Phone: 052-4293792, 4292894
59.	Raza Sports (RS brand bats)	Mr. Imran Younas	Proprietor	Kacha Shahab, Jivanpura, Sialkot Phone: 0300-6105922
60.	Platinum Sports	Mr. Mian Sheraz Javed	Proprietor	Chah Khajoori Wala, Nasir Road, Sialkot Phone: 052-3256655
61.	M.T. Techniques	Mr. Muhammad Farooq Bhatti	General Manager	88/92, SIE, Sialkot Phone: 052-3556661, 3253311, 0345-6777149
62.	Maxima Industries	Mr. Sohail Yaqub Mehr (2nd Interview for Composite)	Partner	Ali ul Haq Road, Model Town, Sialkot Phone: 052-3562481-2, 0300-6107436
63.	Model Sports	Mr. Umar Khalid	Production Manager	130-132 C, Fatima Jinnah Road S.I.E, Sialkot Phone: 052-3556662, 3556662, 0306-6183269
64.	YMS Sports	Mr. Hamid Khokhar	Proprietor	Nai Abadi, Mohallah Bagra, Daska Road, Sialkot Phone 0432-560710, 0333-8621687
65.	Malik Sports (MB Brand)	Malik Muhammad Ali	Proprietor	32-A, Small Industrial Estate, Near Grid Station, Sialkot Phone: 052-3557598, 3255398, 0333-8732009
66.	Ihsan Sports	Mr. Nazeer Khan	Manager	Near CA Sports, Haji Pura, Sialkot Phone: 052-3552370, 0334-0489082
67.	Crawford Industries	Mr. Muhammad Sabir Butt	CEO	Deputy Bagh, Street, Sialkot
68.	Aqib Professional	Mr. Muhammad Nawaz	Proprietor	Haji Pura Road, Near Govt. Girls College, Sialkot Phone: 0333-8700502

14.4 List of Establishments

	Name of Establishments	Registration Status	Products Manufactured	Address Of Establishments
1	Ajmal Khan Maker	Non-Registered	Inflatable ball	Deera Sanda Sialkot
2	Malik Maker	Non-Registered	Inflatable ball	Noor Pura Sialkot
3	Ali Trade Center	Registered	Inflatable ball	Sadrana Near Phatak Sialkot
4	Akram Maker	Non-Registered	Inflatable ball	Pathana Wali Silakot
5	Irfan Maker	Non-Registered	Inflatable ball	Sadrana Near Phatak Sialkot
6	Tafal Maker	Non-Registered	Inflatable ball	Sadrana Sialkot
7	Safet Sports	Registered	Inflatable ball, Garments, Protective Gear	Daska Road Sialkot
8	Telan Sports	Registered	Inflatable ball	Pasroor Road Sialkot
9	Awan Groups	Registered	Inflatable ball	Haji Pura Sialkot
10	Basheer Sports	Non-Registered	Inflatable ball	Sadrana Sialkot
11	Zrs Sports	Registered	Inflatable ball	Neika Pura Silakot
12	Tariq Sports	Non-Registered	Inflatable ball	Rasool Pur Bhaliyan
13	Asif Football	Non-Registered	Inflatable ball	Rasool Pur Bhaliyan Sialkot
1	Aslam Maker	Non-Registered	Inflatable ball	Rasool Pur Bhaliyan

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15	Wajid Sports	Non-Registered	Inflatable ball	Rasool Pur Bhaliyan Sialkot
16	Irfan Inc.	Non-Registered	Inflatable ball	Sandrana Syeda Sialkot
17	Tajmahal Sports	Registered	Inflatable ball	Daska Road Sialkot
18	Haji Sayed Ball Maker	Registered	Inflatable ball	Rowail Garh Wala Road Sialkot
19	Bao G And Sons	Registered	Inflatable ball	Small Industries Sialkot
20	Aslim Maker	Non-Registered	Inflatable ball	Mahala Boharwali Mahal Mattan Sialkot
21	Syed Matlob Maker	Registered	Inflatable ball	Garbala Syedan Sialkot
22	Lazer Sports	Non-Registered	Inflatable ball	Garbala Syedan Sialkot
23	Slaser Sports	Registered	Inflatable ball	Bara Gunna Sialkot
24	Niyamat Maker	Registered	Inflatable ball	Bara Gunna Sialkot
25	Karamat Maker	Non-Registered	Inflatable ball	Chota Dhera Sandha Sialkot
26	Shoqat Makers	Registered	Inflatable ball	Chota Dhera Sandha
27	Perveez Maker	Non-Registered	Inflatable ball	Noor Pura Pasrur Road Sialkot
28	Master Khalid	Non-Registered	Inflatable ball	Bara Gunna Sialkot
29	Capital Stiching Center	Registered	Inflatable ball	Bara Gunna Sialkot
30	Naseer Leather Maker	Registered	Inflatable ball	Sadhrana Syedan Sialkot
31	Latif Maker	Non-Registered	Inflatable ball	Saho Wali Pasrur Road Sialkot
32	Mushtaq Maker	Non-Registered	Inflatable ball	Saho Wali Pasrur Road Sialkot
33	Ramzan Maker	Registered	Inflatable ball	Saho Wali Pasrur Road Sialkot
34	Rasheed Joyia	Registered	Inflatable ball	Saho Wali Pasrur Road Sialkot
35	M Munir Maker	Non-Registered	Inflatable ball	Mandiyan Wala Pasrur Road Sialkot
36	Arif Maseeh Football	Registered	Inflatable ball	Saho Wali Pasrur Road Guna Kala Sialkot
37	Babar Football	Registered	Inflatable ball	Saho Wali Pasrur Road Sialkot
38	Manzor Maker	Registered	Inflatable ball	Saho Wali Guna Kalan Pasrur Road Sialkot
39	Saleem Maker	Registered	Inflatable ball	Waryio Sialkot
40	Dilawar Hussain Maker	Registered	Inflatable ball	Mandiyan Wali Sialkot

41	Aess Muhammad Football Factory	Registered	Inflatable ball	Mandiyan Wali Sialkot
42	Munir Maker	Registered	Inflatable ball	Kot Dindar Sialkot
43	Remaxe Group	Registered	Inflatable ball	Kot Dindar Sialkot
44	Vison Company	Registered	Inflatable ball	Adda Sodhray Sialkot
45	Khalid Oversies Factory	Registered	Inflatable ball	Sodhray K Sialkot
46	Khaja Anwar Khaja Industries	Registered	Inflatable ball	Mundeki Berian Sialkot
47	Khaja Anwar Industies	Registered	Inflatable ball	Mundeki Berian Sialkot
48	Abdulrasheed Maker / Khaja Anwar Industaries	Registered	Inflatable ball	Mundeki Berian Sialkot
49	Riaz Maker	Non-Registered	Inflatable ball	Mundeki Berian Sialkot
50	Awan Sports	Registered	Inflatable ball	Mundeki Berian Sialkot
51	Zafar Makers	Non-Registered	Inflatable ball	Jandookey Goriya Sialkot
52	Rashid Maker	Non-Registered	Inflatable ball	Jandookey Goriya Sialkot
53	Amin Makers	Non-Registered	Inflatable ball	Jandookey Goriya Sialkot
54	Awais Makers	Non-Registered	Inflatable ball	Jandookey Goriya Sialkot
55	Iqball Makers	Non-Registered	Inflatable ball	Jandookey Goriya Sialkot
56	Liaqat Maker	Non-Registered	Inflatable ball	Bhelo K Sialkot
57	Rafiq Maker	Non-Registered	Inflatable ball	Bhelo K Sialkot
58	Bota Maker	Non-Registered	Inflatable ball	Bhelo K Sialkot
59	Rafaqat Maker	Registered	Inflatable ball	Fatehpur Sialkot
60	Manzor Hussain Maker	Non-Registered	Inflatable ball	Fatehpur Sialkot
61	Safdar Ali Maker	Registered	Inflatable ball	Fatehpur Sialkot
62	Safdar Maker	Registered	Inflatable ball	Pasran Sharif Sialkot
63	Mian Younas	Registered	Inflatable ball	Adda Chuvida Sialkot
64	Sabir Gill Maker /Capital	Registered	Inflatable ball	Nangal Bajwa Sialkot
65	Arshad Bajwa Maker	Registered	Inflatable ball	Dugri Hariyan Sialkot
66	Mb Sports	Registered	Inflatable ball, Wood Based Products, Composite Products, Protective Gear	Shaab Pura Road Sialkot

67	Vission	Registered	Inflatable ball, Protective Gear	Vission Pasrur Road Sialkot
68	Aafza Industries	Registered	Inflatable ball	Pasrur Road Sialkot
69	Majar Products	Registered	Inflatable ball, Garments	Madina Masjid Road Sialkot
70	Thapur Pakistan	Registered	Inflatable ball	Shaheed Road Sialkot
71	Techland International	Registered	Inflatable ball	Neka Pura Sialkot
72	Amir Rubber Works	Registered	Inflatable ball	Cheema Street Fathey Gar Agency Sialkot
73	Ali Trading Private Ltd	Registered	Inflatable ball	Sadrana Sialkot
74	Baba Brothers	Registered	Inflatable ball	Cheema Street Sialkot
75	Jamil Sports	Non-Registered	Inflatable ball	Haji Pura Sialkot
76	Nadeem Sports	Non-Registered	Inflatable ball	Haji Pura Sialkot
77	Kashif Boota	Non-Registered	Inflatable ball	Haji Pura Sialkot
78	Ali Ball maker	Non-Registered	Inflatable ball	Haji Pura Sialkot
79	Saeed Ball maker	Non-Registered	Inflatable ball	Haji Pura Sialkot
80	Football Factory	Non-Registered	Inflatable ball	Dulcheki Sialkot
81	Zaheer Football Maker	Non-Registered	Inflatable ball	Chak Qazi Sialkot
82	Sikandar Foot Ball Maker	Non-Registered	Inflatable ball	Chak Qazi Sialkot
83	Nadeem Maker	Non-Registered	Inflatable ball	Monday Ki Goraya Sialkot
84	Anwar Khawja Industry	Registered	Inflatable ball	Galotian Kalan Sialkot
85	Silver Star	Registered	Inflatable ball	Akhbar Chowk Sialkot
86	Sardar Maker	Non-Registered	Inflatable ball	Ram Rahey Sialkat
87	Aafza Industries	Registered	Inflatable ball	Pasroor Road Sialkot
88	Roza Sports	Registered	Inflatable ball	Shaba Chowk Water Tanki Sialkot
89	Babar Shah Foot Ball Maker	Non-Registered	Inflatable ball	Daska Road Sialkot
90	Silver Sitaar	Registered	Inflatable ball	Glottyan More Sialkoy
91	Madital Sports	Registered	Inflatable ball	Daska Road Sialkot
92	Anwar Football Maker	Non-Registered	Inflatable ball	Bambaan Wala
93	Petra Sports	Registered	Inflatable ball	Shaab Pura Sialkot

94	Yousuf Steaching Center	Non-Registered	Inflatable ball	Raam Raya Sialkot
95	Sonison Sports	Registered	Inflatable ball	Shahba Chowk Sialkot Sialkot
96	Forwat Sports	Registered	Inflatable ball	Warzira Bad Road
97	Tempo Enterprises	Registered	Inflatable ball	Paeis Road Sialkot
98	New Rose Sprots	Registered	Inflatable ball	Rang Pura Sialkot
99	State Sports Co	Registered	Inflatable ball	Gandam Mandi Sialkot
100	Danial Industries	Registered	Inflatable ball	Daska Road Sialkot
101	Abro Sports International	Registered	Inflatable ball	Ram Garha Sialkot
102	Forward Sports	Registered	Inflatable ball	Wazeer Abbad Road
103	Awan Sports	Registered	Inflatable ball	Daska Road Sialkot
104	Taj Mahal Sports	Registered	Inflatable ball	Daska Road Sialkot
105	Freemax Sports	Registered	Inflatable ball	Daska Road Sialkot
106	Moltex	Registered	Inflatable ball	Kashmir Road Sialkot
107	Azam Manager	Non-Registered	Composite, Wood Based	Chak Sadha Sialkot
108	Jode Wali Gaon	Registered	Composite, Wood Based	Jode Wali Gaon Sialkot
109	Borna International	Registered	Composite, Wood Based	Barna International
110	Cd Sports	Registered	Composite, Wood Based	Bogra Haji Pora Sialkot
111	Malik Bat	Registered	Composite, Wood Based	Tehseel Bazar Saikot
112	Mehmood Sports	Non-Registered	Composite, Wood Based	Pathana Wali Sialkot
113	Nazir Sports	Non-Registered	Composite, Wood Based	Haji Pura Bund Sialkot

114	Mh Sports	Registered	Composite, Wood Based	Defence Road Agency Stop Sialkot
115	Am Sports Sailkot	Registered	Composite, Wood Based	Douborji Maliya Defence Road Sialkot
116	Faraz Sports	Registered	Composite, Wood Based	Farz Sports7km Daska Road Sialkot
117	Arsgad enterprises	Non-Registered	Composite, Wood Based	Nirala Band House Church Wali Gali Sialkot
118	Shafiq bat factory	Non-Registered	Composite, Wood Based	Kashny Waly Sialkot
119	Rbs Ramzan Bajwa Sports	Registered	Composite, Wood Based	Nidoy Ky Zafer Wal Sialkot
120	Shahzad sports factory	Non-Registered	Composite, Wood Based	Mahla Boghra Sialkot
121	Naqash Sports	Non-Registered	Composite, Wood Based	Koor Pur Road Sialkot
122	Ibs Asports	Non-Registered	Composite, Wood Based	Mughal Pura Sialkot
123	Tackson	Non-Registered	Composite, Wood Based	Tackson Sialkot
124	Model Hockey Sports	Registered	Composite, Wood Based	Sic Industry Aeria Shahaba Road Sialkot
125	Babar Spors	Registered	Composite, Wood Based	Sic Industry Aeria Shahaba Road Sialkot
126	Anwar Sports	Non-Registered	Composite, Wood Based	Daska Road Sialkot
127	Hs Sports	Registered	Composite, Wood Based	Haji Pura Road Sialkot
128	Ihsan Sports	Registered	Composite, Wood Based	Haji Pura Road Sialkot
129	Maxima Industries	Registered	Composite, Wood Based	Shahba Phatak Sialkot
130	Cp Sports	Registered	Composite, Wood Based, Garments	Haji Pura Road
131	Asim Sports	Registered	Composite, Wood Based	Taaj Pura

132	Ambassidar Sports	Registered	Composite, Wood Based	Mujahid Road Near Masjid Chowk Sialkot
133	Hero Sports Indu	Registered	Composite, Wood Based	Mujahid Road Sialokot
134	Premmior Sports	Registered	Composite, Wood Based	Prem Naggar Classico Estate Sialkot
135	Sanyo Sports Pvt	Registered	Composite, Wood Based	62 A Soni Street Mubarakk Colony Sialkot
136	Sachin Sports	Registered	Composite, Wood Based, Garments	Daska Road Sialkot
137	Gallant Pvt Industries	Registered	Composite, Wood Based	Wazira Bad Road Sialkot
138	Regal Sports	Registered	Composite, Wood Based	Pasrurroad Salkot
139	Gosiups Sports	Registered	Composite, Wood Based	Wazera Bad Road Near Pump
140	Bs Leather Wears	Registered	Protective Gear, Garments	Bogra Green Town
141	Jashan Walk	Registered	Protective Gear	Sadha Chowk
142	Popoeye Sports	Non-Registered	Protectiv Gear	Poply Sports
143	Salman Gloves	Non-Registered	Protective Gear	Jispaal Kodli Sialkot
144	T Star Sports	Non-Registered	Protective Gear	Dargaan Wali Pind Sialkot
145	Aslam Gloves	Non-Registered	Protective Gear	Haji Pura Road Sialkot
146	ABX Gloves & Pads	Non-Registered	Protective Gear	Rasool Pur Bhaliyan Sialkot
147	Hero Sports	Non-Registered	Protective Gear	Rasool Pur Bhaliyan Sialkot
148	T Star Sports	Non-Registered	Protective Gear	Dargaan Wali Pind Sialkot
149	No Name	Non-Registered	Protective Gear	Jispal Korli Sialkot

150	Naqse Lasdani Hoseiry	Non-Registered	Protective Gear	Adalat Garhe Sialkot
151	Aph Corporation	Registered	Protective Gear	Adalat Garhe Sialkot
152	Jameel In Dustry	Non-Registered	Protective Gear	Bhabrean Wala Sialkot
153	Afzaal Ghuman	Non-Registered	Protective Gear	Adalat Garha Sialkot
154	Shahzad Hoseiryy	Non-Registered	Protective Gear	Shahzad Ho Sialkot
155	Mu7hamaf Nawaz Unit	Non-Registered	Protective Gear	Nizama Abbad Sialkot
156	Biker City	Non-Registered	Protective Gear	Nizama Abbad Sialkot
157	Salehry Brothers	Non-Registered	Protective Gear	Nizama Abbad Sialkot
158	Ghaffar Unit	Non-Registered	Protective Gear	Nizama Abbad Sialkot
159	Shahbaz Gloves M,Aker	Non-Registered	Protective Gear	Nizama Abbad Sialkot
160	Petel; Nenter Prises	Registered	Protective Gear	Gohad Pur Road Sialkot
161	Ashaq Gear Maker	Non-Registered	Protective Gear	D.P.T.I Bagh Sialkot
162	Arshad Jamil Ball Maker	Non-Registered	Protective Gear	D.P.T.I Bagh Sialkot
163	Sajad Ball Maker	Registered	Protective Gear	D.P.T.I Bagh Sialkot
164	Uro Stile Ure Link	Registered	Protective Gear	SIC Sialkot
165	Hayeeson Corporation	Registered	Protective Gear, Garments	Raghib Town Pasrur Road Sialkot
166	Naz Leather	Registered	Protective Gear	SIC Sialkot
167	Fateh Muhamad Sons	Registered	Protective Gear, Miscellaneous	SIC Sialkot

168	Gold Panel Group	Registered	Protective Gear	Pasrur Road Sialkot
169	Jaffson	Registered	Protective Gear	Pasrur Road Sialkot
170	National Sports	Registered	Protective Gear	Pasrur Road Sialkot
171	Haider International	Registered	Protective Gear	Pasrur Road Sialkot
172	Peka Pak	Registered	Protective Gear, Miscellaneous	Bilmila Chowk Sialkot
173	Comrees Sports	Registered	Protective Gear	Soi Gas Wali Gali Shahba Phatak Sialkot
174	De Capri Industries	Registered	Protective Gear	Jamia Masjid Road Sialkot
175	Libermaan Sports	Registered	Protective Gear, Garments	Daska Road Sialkot
176	Olive Gloves Co	Registered	Protective Gear	Taj Pura Sialkot
177	Babo Sports	Registered	Protective Gear	Sony Villa Taj Pura Sialkot
178	Arena Sports	Registered	Protective Gear	Gandam Mandi Sialkot
179	Sttar Pak Marshal Arts	Registered	Protective Gear, Garments	Wazeera Bad Road
180	Free Man Sports	Registered	Protective Gear, Garments	Mubaarak Pura Sialkot
181	High Scope Sports	Registered	Protective Gear	Ram Garha Sialkot
182	Mixed Sports	Registered	Protective Gear, Garments	Fatima Jinnah Road Sialkot
183	Eternity Sports	Registered	Protective Gear	Smal Industrial State Sialkot
184	Gem Sports Cooperation	Registered	Protective Gear	Small Indutries State
185	Haider International	Registered	Protective Gear, Composite based products	Small Industries Estate Sialkot

186	Akhtar Yousaf Trading Companies Pvt	Registered	Protective Gear	Jammu Road Dalowali Sialkot
187	Maker	Non-Registered	Garments	Bogra Haji Pura Sialkot
188	Imran Garments	Non-Registered	Garments	Fateh Garh Agency Stop Sialkot
189	Asif Garments	Non-Registered	Wood Based Products	Noor Pura Sialkot
190	Z A Sports	Non-Registered	Garments	Haji Pura Sialkot
191	Hugo Sports	Registered	Proective Gear	Haji Pura Road Sialkot
192	Stablish Lather	Registered	Protective Gear	Defence Road Sialkot
193	Mariah Cbc	Registered	Garments	Mubarik Pura Sialkot
194	Boxing Banding	Non-Registered	Protective Gear & Miscellenous	Ugoki Road Adalat Garh Sialkot
195	K.M Printing And Clothes	Registered	Garments	Ugoki Road Adalat Garh Sialkot
196	Inamal Haq Garments	Non-Registered	Garments	Agaki Road Sialkot
197	Welcome Sports	Registered	Garments	Agaki Road Sialkot
198	Muneer Gloves Maker	Non-Registered	Protective Gear	Mahala Nazamabad Sialkot
199	Jacket Making Ilyas	Non-Registered	Garments	Mahala Nazamabad Sialkot
200	Special Sports	Registered	Garments	Toheed Street Rangpura Sialkot
201	Zia Gloves and Gear	Non-Registered	Protective Gear	Mahla Boghra Sialkot
202	Zipy Sports	Registered	Garments	Rang Pura Sialkot
203	Badyal Inter Nmational	Registered	Garments	Mahala Nazamabad Sialkot

204	Gulzaar Gloves Maker	Non-Registered	Protective Gear	Guhad Pur Sialkot
205	Fifth Gayer54 International	Registered	Garments	Guhad Pur Sialkot
206	Down Sports	Registered	Garments	Guhad Pur Sialkot
207	Sarco Sports	Registered	Protective gear	D,P.T.I Bagh Sialkot
208	Naveed Hosieryu	Non-Registered	Garments	D,P.T.I Bagh Sialkot
209	Tareeq Makar	Non-Registered	protective gear	Guhad Pur Sialkot
210	Glove Pouch Maker	Non-Registered	Protective gear	Guhad Pur Sialkot
211	Down Inter National	Registered	Miscellaneous	Guhad Pur Sialkot
212	Master Hozary	Non-Registered	Garments	Storts Market D.T Bag
213	WF Sports	Non-Registered	Garments	D,P.T.I Bagh Sialkot
214	Naeem Sports Goods	Non-Registered	Miscellaneous	D,P.T.I Bagh Sialkot
215	Sabar Wall	Non-Registered	Garments	D,P.T.I Bagh Sialkot
216	Malik Gloves Maker	Non-Registered	protective Gear	D,P.T.I Bagh Sialkot
217	Jamshad Hoesiry	Non-Registered	Garments	D,P.T.I Bagh Sialkot
218	Serat Hosiery	Non-Registered	Garments	Songania Sialkot
219	Model Sports Hosiery	Non-Registered	Garments	D,P.T.I Bagh Sialkot
220	A. H Sports	Non-Registered	Garments	D,P.T.I Bagh Sialkot
221	Mudasir Hosiery	Non-Registered	Garments	D,P.T.I Bagh Sialkot

222	Q.S Sports	Non-Registered	protective gear	D,P.T.I Bagh Sialkot
223	Fateh M,Uhamad Ande Sons	Registered	Miscellaneous	Small Industries Sialkot
224	Colaro Sports	Registered	Garments	Small Industries Sialkot
225	Ali Sports	Non-Registered	Garments	Shaqab Pura Sialkot
226	Khadim Maker	Registered	Garments	Shaqab Pura Sialkot
227	Imran Nazeer	Non-Registered	Miscellaneous	Dodieya Walaiy Sialkot
228	Meg Adon	Registered	Miscellaneous	Bismila Chowk Sialkot
229	Q.S.T Internation	Registered	protective Gear	Pasror Road Sialkot
230	Simon Sports	Registered	protective Gear	Pasror Road Sialkot
231	Shafiq Ashak Stuttle Maker	Non-Registered	Miscellaneous	Doddiya Waliy Pind Sialkot
232	Swisspo Sports	Registered	protective Gear	Christain Town Sialkot
233	A And S Sports	Registered	protective gear	Mahal Bunkan Pakagara Sialkot
234	Long Viev	Registered	Garments	Pasrur Road Sialkot
235	Sheikhaan Corporatrion	Registered	protective gear	Shaab Pura Small Industries Sialkot
236	Woldrof	Registered	Miscellaneous	Small Industries Sialkot
237	Kicker Sports	Registered	Proective Gear	Small Industries Sialkot
238	Bj Sports	Registered	Miscellaneous	Kashmir Road Butt Street
239	Shah Gee Enter Prises	Registered	Garments	A One Sports Kashmir Road Butt Street

240	Zameer Garments	Non-Registered	Garments	Kashmir Road Zameer Garments
241	Comet Sports	Registered	protective gear	Kashmir Road
242	Black Belt	Registered	Protective gear	Gohad Pur Road
243	Capital Sports	Registered	Protective gear	Kashmir Road Pacca Garh
244	Ntc International	Registered	Garments	Wazeer Abbad Road Sialkot
245	Road Star Bears	Registered	Garments	Wazeer Abbad Road
246	Rajco Indusries	Registered	Garments	Wazeer Abbad Road
247	Fast Fly Impex	Registered	Miscellaneous	Wazeer Abbad Road
248	Al Ghzali Inter National	Registered	Garments	Wazeer Road Ugoke
249	Hugo Sports	Registered	Garments	Haji Pura Road Sialkot
250	Rehman Brothers	Registered	Miscellaneous	Haji Pura Sialkot
251	Manzoor Leather	Registered	Proective Gear	Haji Pura Road Mohalla Bugra
252	Qnb Sports	Registered	Miscellaneous	Haji Pura Road Sialkot
253	Spogen Sports	Registered	Protective gear	Ring Pur Stop Ugoki
254	Mansha Brothrs Unit 1	Registered	Miscellaneous	Ugoki Raoad Sialkot
255	Rasheed Champion Shatel	Non-Registered	Miscellaneous	Dodian Wali Village
256	Muhammar Riyaz Shuttelcock	Non-Registered	Miscellaneous	Dudyea Vali Sialkot
257	Anwar Khawaja Hosiery	Registered	Garments	Shahba Chowk Sialkot

258	Ashrif Hosiery	Registered	Garments	Shahba Chowk Sialkot
259	Amsa International	Registered	Garments	Shahba Chowk Sialkot
260	Imran Hosirey	Registered	Garments	Daska Road Sialkot
261	D.K Industries	Registered	Garments	Hammalya Road Sialkot
262	Shahzada Gloves Co. International	Registered	Protective Gear	Docter Peer Basheer St.Rang Pura Sialkot
263	Zia Sports	Registered	Garments	Kareem Pura Sialkot
264	Z.R Sports Co	Registered	Protective Gear	Neka Pura Sialkot
265	Top Ten International	Registered	Garments	Nasir Road
266	Ittehad Impex	Registered	Garments	Defence Road
267	Prime Laether	Registered	Protective Gear	Daska Road Sialkot
268	Leather Town	Registered	Protective Gear	Capital Road
269	Comet Garments	Registered	Garments	Nasir Road
270	Platinum Sports	Registered	Garments	Nasir Road
271	Sports Corner	Registered	Garments	Wazeer Abbad Road Sialkot
272	Tambola Sports	Registered	Garments	Rang Pura
273	Duzzling Star International	Registered	Garments	Daska Road Sialkot
274	Markizeo Sports	Registered	Garments	Wazeer Abbad Road Sialkot
275	Pokal Industries	Registered	Garments	Daska Road Sialkot

276	N.T.C International	Registered	Garments	Daska Road Sialkot
277	Brothers Production Limited	Registered	Garments	Roras Road
278	Boxing Ring	Registered	Protective Gear	Kasmir Road
279	Midland Sports	Registered	Garments	Muhamad Pura
280	Zmf International	Registered	Garments	Daska Road Sialkot
281	Ballon De Sports	Registered	Miscellaneous	Daska Road Sialkot
282	Blue Horizon	Registered	Protective Gear	Daska Road Sialkot
283	Kompala Spotrs	Registered	Protective Gear	Syed Pur Road Sialkot
284	Hansa Spotrs	Registered	Garments	Syed Pur Road Sialkot
285	Lex Mark Sports	Registered	Garments	Sialkot Cantt
286	Vip Wears Pvt Limited	Registered	Garments	Syed Pur Road Sialkot
287	Sadat Sports	Registered	Garments	Sialkot Cantt
288	Leather Field	Registered	Garments	Wazeer Abbad Road Sialkot
289	Super Ace International	Registered	Garments	Wazeer Abbad Road Sialkot
290	Pro Safety	Registered	Garments	Daska Road Sialkot
291	Six As Group	Registered	Proective Gear	Daska Road Sialkot
292	Fine Sports	Non-Registered	Garments	Daska Road Sialkot
293	Technic Garments	Registered	Garments	Daska Road Sialkot

294	Twi Motor Bike Garments	Registered	Garments	Wazeer Abbad Road Sialkot
295	Atro Nan And Group	Registered	Garments	Wazeer Abbad Road Sialkot
296	Euro Plus	Registered	Garments	Daska Road Sialkot
297	Biko Spotrs	Registered	Garments	Daska Road Sialkot
298	Kompal Industries	Registered	Protective Gear	Daska Road Sialkot
299	Pak German	Registered	Proective Gear	Kashmir Road Sialkot
300	Zb Group	Registered	Garments	Civil Road Sialkot
301	Popey Impex	Registered	Miscellaneous	Haji Pura Sialkot