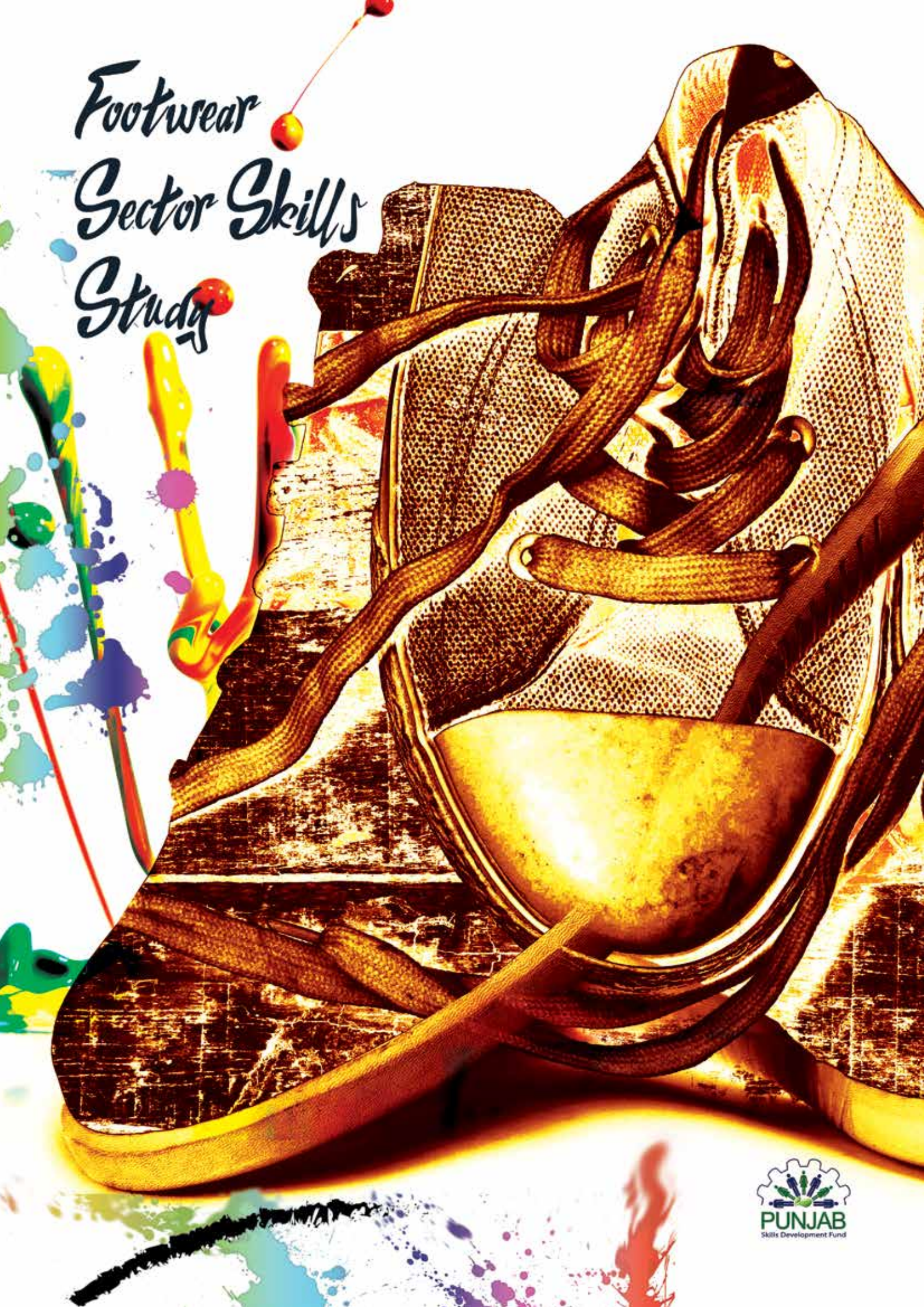


# Footwear Sector Skills Study





## DISCLAIMER

**Sidat Hyder Morshed Associates (Pvt.) Ltd. has taken due care in conducting the survey exercise, analyzing and reporting the findings emergent from this survey exercise. Applicable Quality Assurance processes have been applied to ensure that accurate and consistent information, retrieved from our respondents during the survey, is provided in the body of this report.**

**The information in this report may be subject to update, modification and amendment. Additional information was obtained through desk research while the bulk was provided by the survey respondents which include, government ministries/organizations, associations; senior management at organizations, training service providers, sector experts and other stakeholders associated with the footwear industry (see Annexure). The information contained herewith is believed to be accurate as reported to us by the respondents.**

**The views presented herein belong to the survey respondents and the secondary sources of information and do not necessarily reflect the views of the consultants unless otherwise explicitly stated**

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|           |   |
|-----------|---|
| RFP       | Request for Proposal                                    |
| PSDF      | Punjab Skills Development Fund                          |
| DFID      | Department for International Development                |
| TSPs      | Training Service Providers                              |
| SHMA      | Sidat Hyder Morshed Associates (Pvt.) Ltd               |
| TOR       | Terms of Reference                                      |
| IDI       | In-Depth Interview                                      |
| QC        | Quality Control   |
| OJT       | On The Job Training                                     |
| PFMA      | Pakistan Footwear Manufacturers Association             |
| SMEDA     | Small and Medium Enterprises Development Authority      |
| TDAP      | Trade Development Authority of Pakistan                 |
| LCCI      | Lahore Chamber of Commerce and Industry                 |
| WTO       | World Trade Organization                                |
| FPCCI     | Federation of Pakistan Chambers of Commerce & Industry  |
| PITAD     | Pakistan Institute of Trade & Development               |
| PTA       | Pakistan Tanners Association                            |
| PIDE      | Pakistan Institute of Development Economics             |
| SMEDA     | Small & Medium Enterprises Development Authority        |
| HS code   | Harmonized System Codes                                 |
| PS        | Primary Sample  |
| SS        | Secondary Sample  |
| KPK       | Government of Khyber Pakhtunkhwa                        |
| TEVTA     | Technical Education & Vocational Training Authority     |
| R&D       | Research and Development                                |
| P.V.C     | Poly Vinyl Chloride                                     |
| EAC       | Economic Advisory Council                               |
| CAD / CAM | Computer-aided design / Computer-aided manufacturing    |
| PCSIR     | Pakistan Council for Scientific and Industrial Research |
| SMEs      | Small and Medium-Sized Enterprises                      |
| EPA       | Export Promotion Agencies                               |
| VTC       | Vocational Training Centre                              |
| TTC       | Technical Training Centre                               |
| DAE       | Diploma of Associate Engineering                        |
| ISO       | International Organization for Standardization          |
| GSP       | Generalized Scheme of Preferences                       |
| COP       | Cost of Production                                      |
| PIFD      | Pakistan Institute of Fashion Design                    |
| ILT       | Institute of Leather Technology                         |
| LCCI      | Lahore Chamber of Commerce and Industry                 |
| FATA      | Federally Administered Tribal Areas                     |
| USAID     | U.S. Agency for International Development               |
| GILT      | The Government Institute of Leather and Technology      |
| FILT      | Footwear Institute of Leather and Technology            |
| UMT       | University of Management and Technology                 |
| HS        | Health and Safety                                       |
| GILT      | Government Institute of Leather & Technology            |
| PIFD      | Pakistan Institute of Fashion & Design                  |
| FTIC      | Footwear Training Institute Charsadda                   |
| CFMD      | Centre for Management Development                       |
| PIMS      | Pakistan Institute of Modern Studies                    |

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# LIST OF ANNEXURE



# EXECUTIVE SUMMARY

The Footwear sector in the Punjab represents within it the potential to drive employment within the province over the coming years by virtue of its continued growth. PSDF has commissioned Sidat Hyder Morshed Associates (Pvt.) Ltd to conduct a survey of footwear manufacturing establishments within the province with a view towards determining current and projected footwear related technical and vocational training requirements. What follows is a summary of the emergent findings of the survey.

The methodology was developed in response to the Terms of Reference (TOR) and scope of work provided by (PSDF). The study was comprised of both qualitative (25 In-depth interviews with sector experts and 5 In-depth interviews with Training Service Providers) and quantitative (147 structured interviews with the footwear establishments in Punjab) study supported by extensive desk research. The survey instruments (Questionnaire and discussion guidelines for IDI's) were designed by SHMA and approved by PSDF. Both the IDI's and questionnaire were pre-tested before its final application in the field.

## LABOR PROFILE

Workforce in the footwear sector is dominated (81% male) and mainly filled by the age bracket of 21 years to 30 years (43%). The overall level of education is quite low. Three out of every ten workers are reported to be illiterate. Only 12% of the total workforce reported to possess any degree or diploma.

## MANUFACTURING PROCESSES

Footwear manufacturing concerns use a range of hand-craft tools, and semi-automated equipment in their processes. High volume production units are mostly semi-automated. In large footwear manufacturing units, employees specialize in one particular production stage. In smaller company (mostly with less than 10 employees) one person can be involved in multiple processes.

Typical duties common to all the manufacturing units are designing, pattern making, cutting, stitching, upper making, closing, lasting buffing, and finally packing and dis-

patch of product.

## AUTOMATION/TECHNOLOGY

Most of the operations in the manufacturing process are performed by using hand/hand tools or a combination of hand and with some machine work. Use of semi-automated and automated machinery and equipment is limited to large sized entities. Notwithstanding a gradual shift towards increased automation, the industry itself as a whole is still bound to outdated production processes and hand tool based production techniques.

## TRAINING AND RECRUITMENT

Word of mouth is the preferred method of recruitment. Companies mostly recruit production workers through personal references/contacts or place signs/advertisement outside factory gates.

Training tends to be mostly on the job considering the low education and training profile of the manpower in this sector. Furthermore, trained or highly educated staff tend to command higher salaries which is why most manufacturing units prefer to hire raw or inexperience resources and train them as per their requirements.

Workforce within the sector is highly mobile; another reason why manufacturing units are reluctant to invest overmuch in training.

## AWARENESS OF TRAINING SERVICE PROVIDERS

Industry representatives and sector experts tended to have low awareness of training service providers providing training to this sector.

Those that had knowledge were dissatisfied with the level/quality of technical and vocational training on offer.

## EMPLOYERS' WILLINGNESS TO ACT AS TSPS AND/OR CO-FINANCING THE TRAININGS FOR EMPLOYEES:

56% of the respondents (81 units) have shown willingness to set up a training facility in their manufacturing prem-

ises and would like to have PSDF's support to setup a footwear training institute within the facility. However, only few were willing to invest their own capital. Majority have also shown their unwillingness to co-finance the training of their existing workers.

## INTERVIEWS WITH TRAINING SERVICE PROVIDERS:

The programs offered by the TSPs under study include bachelors Programs (4years), Diplomas, Certificate Courses (3 & 6 months' duration) and other specialized Courses. The key course contents include; designing, Sketching, Pattern Making, Cutting/clicking, Stitching/sewing, Closing, Upper making, lasting, Finishing techniques, molding operations, material handling techniques, Quality assurance, CAD/CAM, shoe repair, work safety etc.

## TRADE/COURSE / CURRICULUM-SELECTION, DESIGN AND DEVELOPMENT

TEVTA plays an important role in the selection of trades and development of Curriculum both for the students as well as the trainers/ teaching staff. Other influencing stakeholders include experts from industry and education department. Limited participation of central committee within government sector was reported.

TEVTA was also reported to be responsible for selection and development of course/curriculum for most of the government and private sector institutes. However for some private sector institutes this was mostly done through their foreign collaboration and specialists.

TSPs reported to conduct regular surveys amongst public/private organizations, related associations and industry experts in identifying the skill gaps and used it as reference for trade selection and curriculum development.

TSP's have laid great emphasis on building a strong "TSPs and Industry Relationship" at all levels as it will not only help in identifying and bridging the skill gaps but will also keep them updated of the technological advancement taking place in the footwear sector. They have also laid emphasis on the training of trainers, uniformity of curriculum and regular review of curriculum to keep it updated as per industry requirements and international standard.

## SELECTION AND RECRUITMENT OF TRAINING STAFF

The selection and recruitment of trainers was reported to be governed by TEVTA on the criteria laid by them. The TSP's were of the view that Research and Development Department at TEVTA is actively involved in setting out the criteria for selection and recruitment, curricula development and training of the teaching staff and their development as per industry needs.

## PLANS FOR EXPANSIONS

All the TSP's under the study were keen on expansion,

but were unable to do so due to budgetary/financial constraints.

## AFFILIATIONS, PARTNERSHIPS, ACCREDITATIONS AND INTERNATIONAL CERTIFICATIONS

All the TSP's under study reported to have some sort of local affiliation and observed local accreditation as well. However apart from UMT (certified by South Asian Quality assurance System) none of them reported to have any international affiliation and accreditation related to footwear. Further none of the TSPs had any intention to acquire any sort of international recognition.

## INTERVIEWS WITH SECTOR EXPERTS:

Almost all the respondents under study were of the view that there are skill shortages at each and every step of shoe making process and this shortage is expected to rise in the next five years especially in light of increased automation.

## TRAINING AND EDUCATION IN THE FOOTWEAR SECTOR

The sector experts were of the opinion that the currently available training options lack the capacity to meet the current and future skill needs of industry and that the gaps were widening with the passage of time. A strong need for theoretical knowledge coupled with practical exposure in order to enhance the level of skills was felt.

The sector experts were of the opinion that there is an opportunity available for manufacturers and training service providers to work together. TSP's are not currently providing practical experience to their students which can be had at the manufacturer level.

## PSDF AWARENESS

Knowledge of and awareness of PSDF and its role is low amongst all respondents. Sector specialists on the other hand had knowledge of PSDF, its role, mission and responsibilities.

## SKILLS ASSESSMENTS

A large set of skills were identified that are required by the footwear industry. The skills that are currently high in demand (based on the results of 'demand projections'; section 7.2, chapter 7) and for which the demand is expected to rise in next five years are summarized below. The skill gaps identified are also presented against each skill.

- **Shoe Designing**- Inability to create new designs, replicate designs, modify designs as per needs; create cost effective designs which are easier to produce; knowledge of shoe anatomy; knowledge of latest fashion trends;
- **Pattern making**-Inability to convert designs on paper; Inability to create patterns of various sizes; Lack of knowledge about shoe anatomy and shoe sizes hence unable to make proper patterns with respect to size;



- **Advance IT/Software/CAD/CAM** - Lack of knowledge/inability to use latest software on footwear designing; Lack of knowledge /ability to use pattern making software;
- **Cutting/Clicking** - Lack of knowledge of handling various tools/machine/equipment used for cutting; latest technologies used in the cutting department (bulk cutting, laser cutting etc.); Inability to follow design , match patterns (printed, embossed material) to cut identical pair of shoes;
- **Stitching/Upper Stitching/Closing/Sewing** - Inability to stitch neatly with minimum errors/wastage of material, Inability to match colors (matching threads color with material), Lack of practical training at the institutes / hands on exposure to a variety of stitching methods (hand stitching, machine stitching;
- **Machine Operating Skills** - Lack of knowledge about machine operations; Lack of technical knowledge on working of production plants; Insufficient knowledge about various sophisticated machinery in use; Lack of knowledge of preventive maintenance; Inability of machine operators to transfer knowledge to juniors;
- **Molding** - Lack of knowledge about molding machine operations; Lack of technical knowledge of mold making/mold making process;
- **Last/Lasting** - Lack of knowledge of the importance of last/lasting in the shoe making process; Lack of training on last making/performing various type of lasting operations using a variety of techniques/ machines;

Further the positions which are considered as “Hard- to-Fill” and their causes are as follows:

- **Footwear Design Engineer** - Acute shortage due to high industry demand and low supply of good designers; Lack of qualified professional shoe designers to teach the subject (both at institute and organization);Lack of workshops where the designers can get hands on experience on shoe designing; Lack of knowledge of latest fashion trends; Ageing karigars;
- **Stitchers** - Lack of training staff in the footwear industry itself to train the new hires; Lack of training institutes; Lack of practical training at the institutes / hands-on experience to a variety of stitching methods (hand stitching, machine stitching , use of various size and type of needles based on the type of stitching required and material in use)
- **Advanced IT** - CAD/CAM Specialist in Footwear-Lack of knowledge/inability to use of latest software on footwear designing; Lack of training options on the use of footwear related software;
- **Pattern Maker** - high industry demand; lack of training facility Ustaads- skills have not been passed on to family /shagirds;
- **Quality Control Manager** - Lack of qualifications/expertise the company demands, skill acquired by theoretical knowledge coupled with practical experience

## DEMAND AND SUPPLY OF SKILLS/TRAININGS IN SECTOR

It has been derived (through demand projection exercise conducted for the study) that majority of the trainings during 2019-2020 would be required for Cutting/Pasting/Lasting/Trimming skills (44,109), followed by sewing (36,065), labeling/embossing (27,656), embroidery (27,544), Footwear Designing Skills (18,796), CAD/CAM and Advanced IT skills (15,796) and Pattern Making Skills (15,358).Further the demand and supply scenario for Footwear key skills’ trainings during 2019-2020 illustrates a wide gap in demand (skills’ training demand) and supply (Number of seats available in TSPs) and this shows a substantial potential for trainings and capacity building in this sector<sup>1</sup>.

<sup>1</sup> CHAPTER 7, SECTION 7.2 AND TABLES 72 & 73

# 1. INTRODUCTION



1.1 BACKGROUND AND IMPORTANCE OF THE SECTOR

1.1.1 Pakistan has a substantially large unorganized footwear sector. Craft manufacturers/cobblers represent the majority of footwear manufacturing in Pakistan and only around 20% of the sector is organized. Pakistan produces around 299 million pairs of footwear annually, of which approximately 10 million pairs are exported. The industry has had a significant increase in export in recent years and exports now stand at around US\$105 million per year<sup>2</sup>. Several types of footwear and specialized shoes are being produced by the local industry e.g. sportswear, army, disabled persons and safety shoes for industrial workers, children footwear, men’s footwear, women’s footwear etc. The population of Pakistan is expected to be about 189 million by the year 2015 (increasing at an average rate of 2.1% per year). Keeping in view this growth in population, substantial growth in demand in the footwear industry is anticipated<sup>3</sup>.

1.1.2 As indicated in the ‘Request for Proposal’ (RFP) document, it is anticipated that footwear exports will grow manifold in coming years, since Pakistan has been awarded Generalized Scheme of Preferences Plus status (zero/low duty export) by the European Union<sup>4</sup>. It is expected that the greater part of leather footwear manufactured domestically will now be exported while local footwear consumption would retain their existing position in synthetic and non-leather shoes<sup>5</sup>. In addition to this, the domestic market for synthetic footwear, which has hitherto been dominated by Chinese imports, seems ripe for reclamation by local manufacturers as Chinese labor costs escalate and the Pak-Rupee devalues. It has been observed that the Pakistani footwear industry is gearing not only to gain strength but also to compete globally.

1.1.3 Furthermore, the Pakistani footwear sector now operates in a globally competitive environment of vast technological change and the proliferation of automated manufacturing processes. This has great implications on how the footwear workforce is structured in terms of education and training, which in turn needs to correspond to specific requirements in technology, design, product development, shoemaking, quality testing, and other pre- and post-production processes. The RFP document further illustrates that, whilst the sector is experiencing the need to use increasingly advanced production technology (e.g. computer-aided design and computer-controlled machinery), there is also a corresponding, parallel urgency to incorporate higher levels of hand skills (particularly stitching and finishing). This necessitates a coordinated and well-considered strategy to enhance skills’ levels so that the footwear sector may fully benefit from emerging export opportunities.

1.2 PURPOSE OF THE STUDY

1.2.1 Punjab Skills Development Fund (PSDF) is a Section 42, not-for-profit Company set up under the Compa-

nies Ordinance 1984 by the Government of the Punjab in collaboration with Department for International Development (DFID), United Kingdom. PSDF aims to provide quality skills and vocational training to the poor and economically vulnerable members of the population in the districts in which it operates. PSDF is a ‘funding body’ established with the purpose of ensuring effective and efficient usage of existing training and development resources both in the public and private sector. It is expected that through this mechanism, a training market will germinate and take hold in the province that is flexible enough to respond to the needs of the market with sufficient quality and efficiency, both for the industry and for the population.

1.2.2 The organization covers districts in Southern, Central and Northern Punjab, which include Bahawalpur, Bahawalnagar, Muzaffargarh, Lodhran, Lahore, Sargodha, Gujranwala, Faisalabad, Chiniot, Sheikhpura, Rahim Yar Khan, Vehari, Khanewal, and Narowal. These districts possess well-established industrial and agricultural clusters. PSDF intends to identify and address technical and vocational training needs in employment-intensive sectors, of which footwear is one. This timely intervention by the PSDF is a welcome step in the right direction as the provincial government has identified the footwear industry as a potential growth sector, and asserts that this sector calls for a coordinated and well-considered strategy to fully benefit from emerging export opportunities.

1.2.3 PSDF has commissioned **Sidat Hyder Morshed Associates (Pvt.) Ltd.** to conduct a Footwear sector-specific study of emergent skill development needs that would explore broader skill needs and offer a comprehensive and holistic view of skills needed across footwear value chains. This information will supplement PSDF’s overarching objectives concerning skills development in Punjab. This study aims to also contribute to the organization’s goal of raising skills levels and competencies to provide impetus for enterprise and creating more and better jobs in the province.

1.2.4 The outcome of this Sector Skill Study will help in the assessment of skill needs in the Footwear Sector through the assessment of the current skill levels, development of plans for strengthening the skill potential of workers and identification of sector level skills delivery gaps. Moreover the outcome of this study will also help to develop a medium to long-term roadmap for human resource development for the footwear sector focusing on vocational and technical skills.

1.3 SCOPE OF WORK

1.3.1 Based on the Terms of Reference and feedback received from PSDF, the ‘Scope of Work’ for this study is reproduced and is presented in annexure;

1.4. OBJECTIVES OF THE STUDY

1.4.1 The overall objectives of this study, as per discus-

sions with client and provided in the TOR, are to:

- a. Assess current skill levels (both vocational and professional) in the footwear sector of Punjab (not limited to the fourteen districts where PSDF operates);
- b. Inform PSDF’s plan to strengthen the skill potential of workers in the footwear sector; this will include identification of trades in demand, training courses required and training delivery options;
- c. Identify sector-level skills delivery gaps and the contribution required of other industry players, and;
- d. Develop a medium- to long-term roadmap for human resource development for the footwear sector focusing on vocational and technical skills.

1.5. STRUCTURE OF THE REPORT

1.5.1 This report is structured as follows:

| Chapter   | Purpose   |
|---|---|
| Chapter 1:Introduction  | This chapter explains the background and importance of footwear sector along with objectives and scope of work.   |
| Chapter 2: Methodology  | This chapter describes the methodology (including sampling methodology) adopted by us to complete various project tasks.  |
| Chapter 3: Profiling the Footwear Sector–Literature Review            | This chapter of the footwear skills study report provides an overview of global footwear industry trends, and size, production, consumption, structure and nature of footwear industry in Pakistan. This chapter also highlights key challenges facing the sector, sector growth, trade and major trading partners, employment and skills demand in the sector, policy initiatives and training supply.                           |
| Chapter 4: Findings of The Formal and Informal Establishments ‘Survey | This chapter provides the findings obtained from the survey of formal and informal footwear manufacturing units.  |
| Chapter 5: Detailed Findings –Training Service Providers              | This chapter provides the findings obtained from the qualitative survey of TSPs providing training to the Footwear sector. It provides key findings on courses, affiliations, accreditations, selection and recruitment of training staff, post-training facilities offered to graduates, plans for expansion and international certifications.   |
| Chapter 6:Detailed Findings –Sector Experts                           | This chapter provides the views and opinions of industry representatives and sector experts interviewed for this survey. It provides their views on trends in the global footwear industry, Pakistan’s footwear industry, shoe-making process-skills required, assessments of skills requirement and skills gaps, on -the -job and off -the-job training opportunities, off –the-job training, TVET and the footwear sector       |
| Chapter 7: Summary of Findings  | This section of the report will provide brief summary of findings derived from In-depth interviews and quantitative survey of respondents companies. The recommendations emanating from the survey are also summarized here. Further, this chapter predominantly presents recommendations on closing skills gaps, enhancing supply of skills, policy interventions required, opportunities for private sector participation, etc. |

TABLE 1: SUMMARY OF CHAPTERS

<sup>2</sup> DATA RETRIEVED FROM; ANALYSIS OF FIGURES TAKEN FROM TDAP WEBSITE, IN DEPTH INTERVIEW FROM PFMA, COMTRADE WEBSITE AND ITC.  
<sup>3</sup> CHANGING REVEALED COMPARATIVE ADVANTAGE: A CASE STUDY OF FOOTWEAR INDUSTRY OF PAKISTAN, A REPORT BY PAKISTAN INSTITUTE OF DEVELOPMENT ECONOMICS,  
<sup>4</sup> AKHTAR, N., ZAKIR, N., GHANI, E., CHANGING REVEALED COMPARATIVE ADVANTAGE: A CASE STUDY OF FOOTWEAR INDUSTRY OF PAKISTAN, PAKISTAN DEVELOPMENT REVIEW, 2008,  
<sup>5</sup> IN-DEPTH INTERVIEW WITH CHAIRMAN OF PFMA



| Chapter                                     | Purpose  |
|---|--|
| <b>Project Kick off and Design Research</b> | <ul style="list-style-type: none"> <li>Stake Holder Meeting/Initial meeting</li> <li>Review of Secondary Data</li> </ul>   |
| <b>Sample Design and Selection</b>          | <ul style="list-style-type: none"> <li>Design of Sampling Plan/Sampling Scheme</li> <li>Finalization of Sample/sampling strategy in consultation with Client</li> <li>Selection and finalization of Survey respondents (including establishments, TSPs and Sector Experts spread over 20 districts of Punjab)</li> </ul>   |
| <b>Field force Selection and Training</b>   | <ul style="list-style-type: none"> <li>Selection of Field force from our in-house pool of consultants</li> <li>Preparation of training guides for enumerators/Supervisors</li> <li>One day training course for training enumerators on survey instruments (Half day theory plus half day practical)</li> <li>Provide lists/Schedules for districts for conduct of surveys</li> </ul> |
| <b>Design and Survey Instruments</b>        | <ul style="list-style-type: none"> <li>Design of Questionnaire Formal and Informal for footwear establishments</li> <li>Design of in-depth interview guide for sector experts and TSPs</li> <li>Pretest/Pilot test of survey</li> </ul>  |
| <b>Conduct of Survey</b>                    | <ul style="list-style-type: none"> <li>Securing survey participation</li> <li>Conduct of Questionnaire Survey of 147 formal and informal footwear establishments</li> <li>Conduct of IDI's of 5 TSPs</li> <li>IDI's of 25 Sector Experts</li> </ul>  |
| <b>Data Entry and Analysis</b>              | <ul style="list-style-type: none"> <li>Implementation of QC mechanism</li> <li>Obtain Questionnaire through Courier</li> <li>Data Entry by in-house team at SHMA Head Office</li> <li>Data analysis, drawing inferences and key findings</li> <li>Report Writing</li> </ul>  |
| FIGURE1: METHODOLOGY COMPONENTS             |  |

## 2.2 DESK REVIEW OF LITERATURE, DATA, INFORMATION AVAILABLE

**2.2.1** As part of the survey, a desk review of available literature, data and information was conducted. This included regional and national reports and other background information relating to context of envisaged assignment.

**2.2.2** The secondary research covered:

- Industry structure and Footwear sector mapping in terms of size and product characteristics,
- Number of formal/cottage and informal establishments and their distribution in Punjab,
- Current industry status and its response to current or upcoming changes; particularly changes like technology, organizational changes, price competition etc.,
- Existing and future skill gaps/shortages in existing labors and new recruitments,
- Review of data available from Government, Semi Government departments and Private Footwear Associations.

**2.2.3** The sources of information reviewed for the purpose of secondary research (of this study) are annexed at the end of this report.

**2.2.4** The secondary research informed the context of subsequent data gathering activities and in the formula-

tion/designing of Project Goals. This research also aided in identification of areas of exploration that were covered in meetings with relevant stakeholders (including Footwear Sector establishments, sector experts and TSPs) and in the identification of key stakeholders tapped for the conduct of interviews.

## 2.3 SAMPLE DESIGN AND SELECTION

QUANTITATIVE SURVEY (FORMAL/INFORMAL ESTABLISHMENTS)

**2.3.1** Based on our desk reviews and as per the directives attained during our meetings with client we employed multistage stratified random sampling which was based upon the following three criteria/stages:

- District wise distribution - Southern, Central and Northern Punjab
- Value chain wise distribution
- Category and type of the entity (as defined by SMEDA and PFMA for the Footwear Sector)

**2.3.2** Based on our desk research we can broadly classify the Footwear industry value chain (with respect to raw material used and industry sub-sectors) as follows:

- Vertically Integrated and Composites units** (vertically integrated in terms of operations, raw material, different businesses units, and technology etc. and composites in terms of type of article- Leather, Textile material based, rubber and synthetic, multiple

footwear upper producers including; footwear, upper of leather(HS Code - 6403), Footwear, nes (HS Code - 6405), Footwear nes, outer soles and uppers of rubber or plastics (HS Code - 6402) and Footwear, upper of textile material (HS Code - 6404), etc.),

- Leather Footwear Manufacturing units** (including leather articles and footwear, upper of leather (HS Code - 6403) -Traders, Manufacturers and Exporters, Manufacturers only),
- Natural rubber/Synthetics/Canvas Footwear Manufacturing units** (including Man-Made articles, Textile along articles, Natural Rubber articles, Footwear, nes (HS Code - 6405), Footwear nes, outer soles and uppers of rubber or plastics (HS Code - 6402) and Footwear, upper of textile material (HS Code - 6404) – Traders, Manufacturers and Exporters, Manufacturers).

**2.3.3** The above classifications were supplemented with a further categorization of footwear companies, as follows;

## CATEGORIES OF THE FOOTWEAR COMPANIES<sup>6</sup>

- Informal/Cottage Companies** (including craft manufacturers/micro and small scale units) – up to 30 employees and can produce at least 100 units a day
- Formal Companies** (Organized sector means capital-intensive factories or mechanized manufacturing process) – More than 30 employees (including medium size companies as well) and can produce at least 100-399 units a day

**2.3.4** Based on the classifications above, a proportionately distributed sample was drawn from 20 selected districts (as depicted below).Some 6 districts from North Punjab, South Punjab and 7 districts from Central Punjab were included in the survey. These districts were selected and finalized on the basis of footwear sector mapping data and the value chain distributions retrieved from sector associations mentioned above.

| North                            | Central        | South           |
|----------------------------------|----------------|-----------------|
| Chakwal                          | Faisalabad     | Multan          |
| Gujrat                           | Lahore         | Sahiwal         |
| Sialkot                          | Gujranwala     | Dera Ghazi Khan |
| Rawalpindi                       | Kasur          | Bahawalpur      |
| Mianwali                         | Sargodha       | Bhawalnagar     |
| Jhelum                           | Sheikhupura    | Vihari          |
|                                  | Toba Tek Singh |                 |
| TABLE 2: GEOGRAPHIC DISTRIBUTION |                |                 |

## FORMAL ESTABLISHMENTS

**2.3.5** Based on the classifications above, a proportionately distributed primary sample of 88 formal establishments was drawn from 19 selected districts. We then drew a similar representative secondary sample of 45 for-

mal establishments. The additional companies served as a backup sample in the eventuality of drop outs/refusals.

**2.3.6** On the occasions where the requisite sampled number of companies with respect to a particular value chain or category did not exist in any particular district, we filled the sample by including the balance number of companies from other value chains and company categories.

**2.3.7** Table 3 provides the total sample size; 47 establishments, for formal sector with regards to all three value chains proportionately distributed amongst districts/regions. The list of formal companies along with their contact details, surveyed for the purpose of this study is annexed at the end of this document.

| Region wise value chain breakup          |    |              |   |              |   |
|--|----|--------------|---|--------------|---|
| Central Punjab                           |    | North Punjab |   | South Punjab |   |
| Leather                                  | 11 | Leather      | 1 | Leather      | 2 |
| Plastics                                 | 7  | Plastics     | 1 | Plastics     | - |
| Synthetic                                | 2  | Synthetic    | 1 | Synthetic    | - |
| Composite                                | 16 | Composite    | 1 | Composite    | - |
| Textile                                  | 2  | Textile      | - | Textile      | - |
| Rubber                                   | 3  | Rubber       | - | Rubber       | - |
| Total                                    | 41 | Total        | 4 | Total        | 2 |
| TABLE 3: REGION WISE VALUE CHAIN BREAKUP |    |              |   |              |   |

## INFORMAL ESTABLISHMENTS

**2.3.8** As per our TORs, the survey sample was to include approximately 100 respondents from the footwear sector. For informal establishments; we designed a primary and secondary sample. The district wise bifurcation of primary and secondary sample is depicted in table below<sup>7</sup>:

| Central Punjab  |    |    | Northern Punjab |    |    | Southern Punjab |    |    |
|---|----|----|-----------------|----|----|-----------------|----|----|
| Location  | PS | PS | Location        | PS | PS | Location        | PS | PS |
| Faisalabad  | 3  | 2  | Chakwal         | 6  | 3  | Multan          | 13 | 10 |
| Lahore  | 44 | 30 | Gujrat          | 11 | 8  | Sahiwal         | 3  | 2  |
| Gujranwala  | 5  | 2  | Sialkot         | 5  | 3  | DG Khan         | 2  | 2  |
| Kasur   | 3  | 1  | Rawalpindi      | 7  | 2  | Bahawalpur      | 3  | 3  |
| Sargodha  | 15 | 11 | Mianwali        | 3  | 1  | Bhawalnagar     | 5  | 3  |
| Sheikhupura   | 9  | 6  | Jhelum          | 2  | 1  | Vihari          | 2  | 2  |
| Toba Tek Singh  | 12 | 8  |                 |    |    |                 |    |    |
| Total   | 91 | 60 | Total           | 34 | 18 | Total           | 28 | 22 |
| <b>Total Secondary Sample Size: 60+18+22=100</b><br><b>Total Primary Sample (Central Punjab + North Punjab + South Punjab) = 153 (Retrieved from Industrial Directory 2011, data from PFMA and SMEDA)</b> |    |    |                 |    |    |                 |    |    |
| TABLE 4: INFORMAL ESTABLISHMENTS (REGION WISE)  |    |    |                 |    |    |                 |    |    |

<sup>6</sup> ACCORDING TO ESTIMATES PROVIDED BY SMEDA, PFMA, CHAMBER OF COMMERCE, PUNJAB DEVELOPMENT STATISTICS 2013 AND BUREAU OF STATISTICS

<sup>7</sup> DATA RETRIEVED FROM INDUSTRIAL DIRECTORY 2011, DATA FROM PFMA AND SMEDA



**2.3.9** Due to the informal undocumented nature of the sector, secondary sources were used to supplement efforts to draw up a sample (**100 informal establishments**), which was then verified and adjusted where required during the course of fieldwork.

### INTERVIEWS WITH BUSINESS EXPERTS AND TRAINING SERVICE PROVIDERS (TSPs)

2.3.10 Based on the secondary research we conducted for the study and the discussions with the client during the course of survey; it has been discovered that the Training Service Providers (TSPs) of quality and reput are few and far between in Punjab.

**2.3.11** Therefore we relied upon extensive secondary research, desk reviews of data and information available on TSPs, client referrals to locate and include in the sample; 4 TSPs from Punjab (3 were based in Lahore and 1 in Gujranwala) and one from KPK. During the selection of TSPs we kept the following key points in mind:

- Capacity of training firm,
- Level and diversity of skills provided,
- Covers several trainings relevant to the value chain mentioned above,
- Provide on-the-job training
- Availability of standard equipment and are regulated by concerned authorities,
- Certifications provided to students/graduates

**2.3.12** As part of the survey, we conducted interviews of 25 sector experts across Punjab. We divided the Sector Expert Sample into the following groups of experts.

| Type of Experts  | Sample Size |
|--|-------------|
| Economists/Government sector experts   | 5           |
| Top tier management of elite footwear industries (including export industries) | 16          |
| Researchers  | 1           |
| Curriculum review / Curriculum developers                                      | 2           |
| Association members etc.   | 1           |
| <b>Total</b>   | <b>25</b>   |

TABLE 5: SECTOR EXPERTS

**2.3.13** The actual number of Quantitative Surveys and IDIs (TSPs and experts) conducted in each district is presented in the following table:

| Districts             | Quantitative Surveys |            | IDIs     |                |
|-----------------------|----------------------|------------|----------|----------------|
|                       | Formal               | Informal   | TSPs     | Sector Experts |
| Faisalabad            | 4                    | 2          | -        | -              |
| Toba Tek Singh        | 2                    | 5          | -        | -              |
| Sargodha              | 2                    | 7          | -        | -              |
| Multan                | 2                    | 10         | -        | 1              |
| DG Khan               | -                    | 2          | -        | -              |
| Vihari                | -                    | 2          | -        | -              |
| Lahore                | 32                   | 17         | 3        | 20             |
| Gujranwala            | -                    | 10         | 1        | -              |
| Kasur                 | -                    | 8          | -        | -              |
| Sheikhupura           | 1                    | -          | -        | -              |
| Chakwal               | -                    | 3          | -        | -              |
| Gujrat                | -                    | 8          | -        | -              |
| Sialkot               | 4                    | 6          | -        | 3              |
| Rawalpindi/ Islamabad | -                    | 2          | -        | -              |
| Mianwali              | -                    | 1          | -        | -              |
| Jhelum                | -                    | 1          | -        | -              |
| Sahiwal               | -                    | 10         | -        | -              |
| Bahawalpur            | -                    | 5          | -        | -              |
| Bhawalnagar           | -                    | 1          | -        | -              |
| Karachi               | -                    | -          | -        | 1              |
| Peshawar              | -                    | -          | 1        | -              |
| <b>Total</b>          | <b>47</b>            | <b>100</b> | <b>5</b> | <b>25</b>      |

TABLE 6: TOTAL QUANTITATIVE SURVEYS AND IDIS (TSPS AND EXPERTS)

## 2.4 SURVEY INSTRUMENTS

**2.4.1** The Survey instruments/data gathering methods employed for this engagement are as follows:



## FOOTWEAR ESTABLISHMENTS

**2.4.2** As per our various discussions with client and based on the contents of the TOR document, the survey instrument was administered at the enterprise level to effectively capture information regarding present and future training needs. The major thrust of the quantitative data gathering effort through this questionnaire was to effectively cover/capture key factors such as;

- Profile of the firm
- Workforce Characteristics
- Type and level of skills needed in sector
- Skill gaps in existing workforce
- Current and future demand of skills
- Existing and future skills shortages in new recruitments
- Relationship with TSPs, etc.

**2.4.3** The instrument was administered in the form of a structured interview to aid the respondent in filling it out. A copy is provided in the annexure.

### TSPS-INTERVIEW GUIDE

**2.4.4** TSP interview guide was administered to identified TSPs /OJTs. We used semi structured to open ended questions in the guide with to the goal of gathering as much information as possible from the respondents during the conduct of interviews.

**2.4.5** The attached TSP interview guide, which has also been annexed to this document, covers the following key factors;

- Profile of the Institute
- Programs/courses offered by the Institute
- Selections criteria for Footwear Trades for which trainings/courses are offered
- Development &review of curriculum/course content
- Training providers' capacity to develop and adapt curricula,
- Ability to offer new vocational/technical courses,
- Linkages with employers etc.

### IN-DEPTH INTERVIEW GUIDE- SECTOR EXPERTS

**2.4.6** The IDI guide served as a guiding document for meetings, discussions and conversations with various sector experts and informed sources. The purpose was to ensure that key areas related to the study received sufficient coverage and benefit from the expertise of the interviewees. The in-depth interview guide was intended to facilitate discussions with Sector Experts of Footwear industry that included; Top Tier Management/experts from

reputed footwear establishments, footwear consultants and researchers, Economists and Government sector, curricula developers and academia etc.

**2.4.7** The attached/annexed IDI guide covers the following:

- Global Footwear Industry- opportunities, challenges etc.
- Pakistan's Footwear industry – challenges, local demand, etc.
- Skills requirement
- Assessments of Skills Levels and Skill Gaps
- On-the-Job and Off-the-Job Training
- Role of Government Sector
- Awareness about PSDF etc.

## 2.5 PRE-TEST/PILOT TEST OF SURVEY

**2.5.1** We performed 6 pre-tests of the survey instruments prior to the main survey. We then incorporated changes, based upon feedback received during the pre-testing exercise.

**2.5.2** We employed the following techniques of pre-testing to effectively test the survey instruments. The pilot tests ensured the accuracy of data captured, length of survey in terms of time duration and relevance etc. Steps conducted to pre-test the survey instrument included:

**Expert review** - The survey design specialist and the sector specialist from our own team reviewed the survey instruments to assess its appropriateness to the objectives of the survey and to ensure its alignment with the nature of the data to be gathered.

**Cognitive Interview** - We used iterative cognitive testing upon 3-4 industry representatives (aligned with sample respondents of varying size), in which interviewers conducted a number of rounds of interviews. We conducted in-depth and probing interviews of 3-4 industry experts/ participants using the designed survey instrument. At the end of each interview, consultants diagnosed emergent issues with the instrument, resolved these and conducted additional rounds of interviews prior to finalization.

## 2.6 SURVEY ADMINISTRATION, TECHNOLOGY AND DATA COLLECTION METHODS

**2.6.1** A one day training course was developed for the purposes of training enumerators on the survey instruments. The course was divided into a half day review and familiarization component and a half day practical exercise. Each enumerator was also required to perform mock interviews as part of role playing exercise.

**2.6.2** Following the training, field work commenced. To set the desired quality standard the Fieldwork Supervisors also accompanied the enumerators on initial field visits.



## 2.7 SURVEY MANAGEMENT AND QUESTIONNAIRE ADMINISTRATION

**2.7.1** For the purpose of the survey we divided data collection into three teams; South Zone, North Zone and Central Zone. Each team comprised two enumerators, one of which was relatively senior resource who had at least more than 3 years of administering large scale surveys, while the other had at least 1-2 years of conducting field work of large scale surveys. These teams were headed by a Fieldwork Supervisor/Manager with extensive experience of managing data gathering teams and conducting several large scale surveys of similar nature. The Field Manager and enumerators had back office support for the mailing of introductory letters and setting up of interviews.

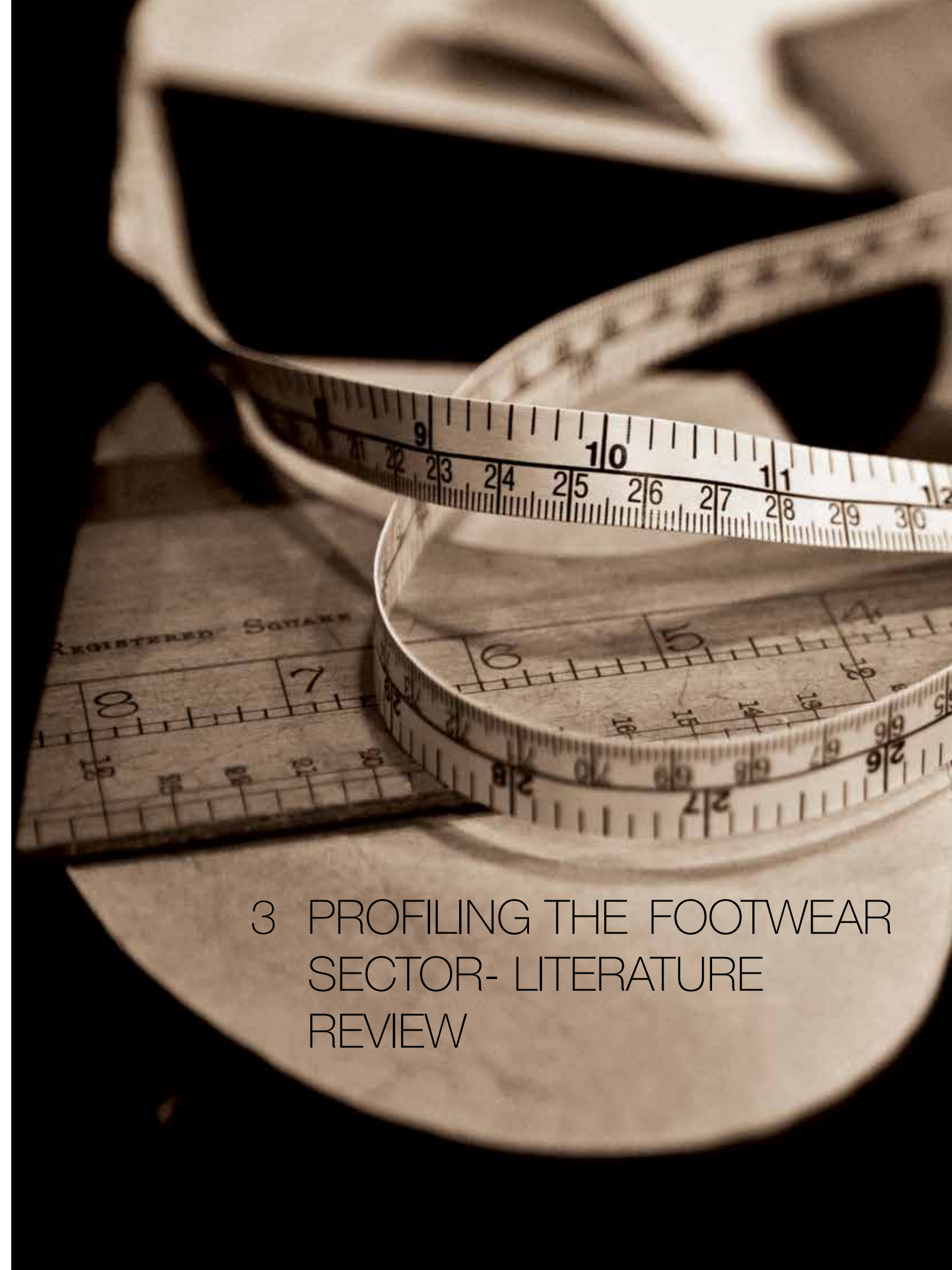
**2.7.2** Field work began shortly after training had been provided to the team based in a particular zone/city (as depicted above). Field coordination and setting of targets were being managed by Fieldwork Supervisor. It was the responsibility of the Fieldwork supervisor to ensure that field work proceeded as scheduled.

**2.7.3** The field teams administered the questionnaires as per their scheduled appointments. On average each enumerator was able to conduct 3-4 interviews a day as permitted by the schedule.

**2.7.4** Quality checks on a random selection of 5-6% of the total sample were conducted, in terms of completeness and internal consistency. Furthermore, the findings of qualitative and quantitative data analysis were compiled in the form of weekly reports and submitted to the client each week for review and approval.

**2.7.5** Data entry began approximately half way through the data collection exercise so that data entry completed shortly after the completion of the data collection activity. The data thus gathered by the consultants were then compiled and analyzed after which report writing commenced.

**2.7.6** This report, containing herein the results of the survey, emergent findings and recommendations, is being submitted to PSDF for their review and comments.



## 3 PROFILING THE FOOTWEAR SECTOR- LITERATURE REVIEW



3.1 GLOBAL FOOTWEAR INDUSTRY TRENDS
PRODUCTION

3.1.1 The worldwide production of Footwear as per recent study conducted by 'World Footwear', an initiative of APICCAPS<sup>8</sup> in 2013, is expected to reach above 26 Billion pairs by end of 2014. Globally the manufacturing of footwear is heavily concentrated in Asia; this continent now produces 87% of all the pairs of shoes produced worldwide. China alone produces more than 60.5% of the world's total<sup>9</sup>. This shift of footwear production to China, away from traditional European suppliers, took place during the last decade. It shifted first to Taiwan and South Korea during 1995-2002 and then to China after 2002. During the last decade, the regional neighbors of China including Pakistan and India, Vietnam, Indonesia and Thailand have entered the top 10 producers, producing more than 20% of the total. These Asian suppliers have taken over significant proportions of the world's production on the back of lower labor costs. Outside of Asia, Brazil is the most important producer, with Mexico, Italy, and Turkey. Together, these ten countries account for up to 90% of the world footwear production<sup>10</sup>.

EXPORTS

3.1.2 Globally the exports of footwear are also heavily concentrated in Asia; this continent now exports 47% of all the pairs of shoes exported worldwide. China has an even greater share of exports as it has in production; almost three out of every four pairs of shoes exported

Table with 4 columns: S. No., Country, Pairs (millions), World Share. Rows 1-10 showing top footwear producing countries: China (12,887 million, 60.5%), India (2,209 million, 10.4%), Brazil (819 million, 3.8%), Vietnam (804 million, 3.8%), Indonesia (700 million, 3.3%), Pakistan (298 million, 1.4%), Bangladesh (276 million, 1.3%), Mexico (253 million, 1.2%), Thailand (244 million, 1.2%), Italy (207 million, 1.0%).

and Hong Kong follow with a 9.09%, 8.75% and 4.36% share respectively. The table also includes four European countries, Italy, Belgium, Germany and the Netherlands in the top 10 exporting countries, all of whom are members of the European Union. Pakistan's position was ranked as 53th among global footwear exporters.

IMPORTS

3.1.3 Global imports also added up to some US\$ 116bn. in 2012 (for all footwear allied products). The US is the world's major buyer with over 22% share of world imports. Europe leads the ranking of world importers. European Union countries account for 47%, with the major

Table with 7 columns: S. No, Rank\*, Exporters, Value of Exports in USD (2008, 2009, 2010, 2011, 2012). Rows 1-11 showing top footwear exporting countries: World, China, Italy, Vietnam, Hong Kong, China, Germany, Belgium, Indonesia, Netherlands, Spain, France, Pakistan.

worldwide come from this country. China is now exporting US\$ 46 Billion worth of Footwear around the globe which is expected to increase in coming years with removal of certain quotas. These figures do not include the exports of the Chinese special administrative region of Hong-Kong, itself one of the world's largest exporters, with a share of 5%. As depicted in the table below Italy, Vietnam

concentration in Germany, UK, France and Italy. Furthermore, Japan (4%), Canada (2%), Switzerland (2%), Australia (1%) and Korea (1%) are also important markets at the global scale. Furthermore African imports have been growing steadily over the last decade.

TOP IMPORTING COUNTRIES

3.1.4 The United States of America is the top importing country of the world with total imports of US\$ 24 billion for the year 2012. The basic components of American imports were mostly rubber and plastic footwear articles (44%) followed by leather footwear (28%). Germany is the second largest importing country of the world with total imports of US\$ 9 billion for the year 2012 and, like USA, the basic components of German imports were mostly rubber and plastic footwear articles (39%) followed by the leather footwear (29%) and textile /canvas articles (24%). France is the third largest importing country with the total imports of US\$ 6.5 billion for the year 2012. Major imports were Rubber and Plastic (38%) followed by Leather (30%) and Textile /Canvas (26%)<sup>12</sup>.

Table with 4 columns: S. No., Country, Pairs (millions), World Share. Rows 1-10 showing top footwear importing countries: USA (2,302 million, 22.4%), Germany (619 million, 6.0%), France (593 million, 5.8%), United Kingdom (480 million, 4.7%), Japan (455 million, 4.4%), Italy (425 million, 4.1%), Hong Kong (358 million, 3.5%), Russian Federation (354 million, 3.4%), Netherlands (256 million, 2.5%), Belgium (245 million, 2.4%).

CONSUMPTION

3.1.5 In 2012, Europe and North America yielded some market share to Asia and Africa, with South America and Oceania holding their positions of year 2011 and 2010. China is the world's largest market again for footwear consumption, in terms of quantity, closely followed by the USA and India. The USA share showed some decrease in consumption during 2012. In the second half of the top 10 table there have been some changes in the ranking of European countries, with Germany and France ranking above the United Kingdom and Spain.

3.1.6 Cross sectional analysis of consumption with imports depicts that the footwear consumption in USA is catered to by imports and manufacture of footwear products in America is low. The situation is somewhat similar in Germany which is the second largest importer, however a considerable percentage of traders in Germany are also importing footwear articles from 'low cost production countries like India, Vietnam etc. and then exporting them to European Countries and North America with high margins<sup>14</sup>.

Table with 4 columns: S. No., Country, Pairs (millions), World Share. Rows 1-10 showing top footwear consuming countries: China (2,761 million, 15.9%), USA (2,248 million, 12.9%), India (2,202 million, 12.7%), Brazil (740 million, 4.3%), Japan (697 million, 4.0%), Indonesia (526 million, 3.0%), Germany (429 million, 2.5%), France (424 million, 2.4%), United Kingdom (372 million, 2.1%), Italy (336 million, 1.9%).

EXPORTS BY HS CATEGORY

3.1.7 A detailed breakdown of leading export countries, by HS code are provided in the annexure. When the data is taken in at a glance, it emerges that globally China leads all exporters in the export of waterproof footwear, rubber and plastic, leather textiles and in the others categories. Variations in market positioning occur for the second and third positions on the list. Italy holds second place for waterproof footwear and leather footwear, exports, Vietnam holds second place market share for rubber and plastics and textiles footwear exports.



8 ASSOCIAÇÃO PORTUGUESA DOS INDUSTRIAIS DE CALÇADO, COMPONENTS, ARTIGOS DE PELE E SEUSSUCEDÂNEOS.
9 WORLD FOOTWEAR YEAR BOOK, 2013, REPORT ON WORLD FOOTWEAR BY PORTUGUESE FOOTWEAR COMPONENTS AND LEATHERS GOODS MANUFACTURERS ASSOCIATION,
10 ANALYSIS ON DATA RETRIEVED FROM UN-COMTRADE, ITC, UN STATISTICS DIVISION, COMEXT AND R&D CELL TDAP
13 DATA RETRIEVED FROM: R&D CELL TDAP AND TDAP WEBSITE

12 R&D CELL TDAP, COMTRADE
13 DATA RETRIEVED FROM: R&D CELL TDAP AND TDAP WEBSITE
14 IN-DEPTH INTERVIEW FINDINGS WITH R&D CELL TDAP AND ANALYSIS OF COMTEXT - EUROPEAN UNION'S EUROSTAT DATA
15 DATA RETRIEVED FROM: R&D CELL TDAP AND TDAP WEBSITE





FIGURE 2: WORLD FOOTWEAR PRODUCTION



FIGURE 4: WORLD FOOTWEAR IMPORTERS



FIGURE 3: WORLD FOOTWEAR EXPORTERS



FIGURE 5: WORLD FOOTWEAR CONSUMPTION



FIGURE 6: PAKISTAN FOOTWEAR INDUSTRY



TABLE 11: PAKISTAN FOOTWEAR INDUSTRY

| 2012-2013  | Analysis    |            |               |            |       |
|------------|-------------|------------|---------------|------------|-------|
|            | Million USD | World Rank | Million Pairs | World Rank | USD   |
| Exports    | 104         | 53         | 8             | 53         | 14.35 |
| Imports    | 75          | 74         | 16            | 64         | 4.46  |
| Production |             |            | 299           | 6          |       |

### 3.2 PAKISTAN FOOTWEAR INDUSTRY: A SNAPSHOT

**3.2.1** The footwear industry is an important sector in the Pakistani economy, particularly in the region of Lahore. Pakistan has a large footwear sector, which belongs mostly to the cottage/unorganized sector<sup>16</sup>. Local retail shops are dependent on the informal footwear sector for their products for which there is a continuous local demand. Only 20% of the footwear sector is organized<sup>17</sup>.

**3.2.2** The national footwear consumption as depicted in table 11 above is around 308 million pairs per year corresponding to approximately 2.0 pairs per person. This against production of 299 million pairs coupled with its own exports makes Pakistan a net importer of shoes. Pakistan was the 12th biggest footwear products' consumption country in 2011 based on data retrieved from United Nations Statistics Division, COMEXT, European Union's Euro stat and UN-COMTRADE 2011<sup>18</sup>. The consumption in Pakistan mainly includes mostly low priced sandals and slippers, Poly Vinyl Chloride (P.V.C) - injected footwear and shoes made by village cobblers. Today most of the shoes produced in Pakistan don't have leather soles; they have synthetic or non-leather soles. The soles mainly are made up of plastic based materials, such as PVC for example<sup>19</sup>. Moreover, official statistics show that the volume of exports is continuously declining in recent years (based on '2001-2011'; Figure 6, data retrieved from Bureau of Statistics and PFMA, Pakistan) in comparison with imports, while their value has increased considerably. The average export price for each pair stands around \$14.

**3.2.3** Pakistan was also the 6th biggest footwear producer of the world during 2011 based on UN-COMTRADE data. The production capacity of Pakistan has reached above 299 million pairs during 2012-2013 and is still increasing. Formal and up-to-date data on industry structure and bifurcation of footwear sector production capacity with respect to major production cities/districts is not available. In the absence of reliable and up to date information on this sector, attempts have been made by few private sector organizations but there is a need for a comprehensive survey of this sector. However, a reasonable estimate can be made as to the current structure of footwear industry based on the primary research (qualitative and quantitative) conducted for this study and secondary sources like SMEDA, LCCI, TDAP, PFMA, EAC, Industrial Directory 2011, etc.

**3.2.4** The geographic spread with production capacity

is given as under:

**3.2.5** As evidenced above the total production capacity

| S. No. | City                                  | Production Capacity (Million Pairs) | Units |
|--------|---------------------------------------|-------------------------------------|-------|
| 1      | Lahore/Gujranwala/Sheikhupura Cluster | 164.75                              | 216   |
| 2      | Karachi                               | 35.64                               | 114   |
| 3      | Sialkot                               | 56.21                               | 102   |
| 4      | Faisalabad                            | 15.98                               | 48    |
| 5      | Multan                                | 11.96                               | 39    |
| 6      | Toba Tek Singh                        | 3.49                                | 15    |
| 7      | Kasur                                 | 3.00                                | 18    |
| 8      | Rawalpindi / Islamabad                | 2.50                                | 12    |
| 9      | Gujrat                                | 2.00                                | 12    |
| 10     | Bahawalpur                            | 1.96                                | 11    |
| 11     | Sargodha                              | 1.50                                | 14    |
| Total  |                                       | 298.99                              | 601   |

TABLE 12: PRODUCTION CAPACITY

for footwear products in Pakistan is estimated to be about 299 million pairs per annum, out of which the Lahore cluster (Lahore, Gujranwala and Sheikhupura) is the major footwear producing area accounting for more than half of the total footwear production. Other key areas in Pakistan for footwear production include Karachi with production capacity of 35.64 Million Pairs, and Sialkot with production capacity of 56.21 Million pairs. These three cities account for 86% of total production capacity in the country. There were, as of 2011, 216 manufacturing units in Lahore, 114 in Karachi and 102 in Sialkot. The total industry classification is given as under.

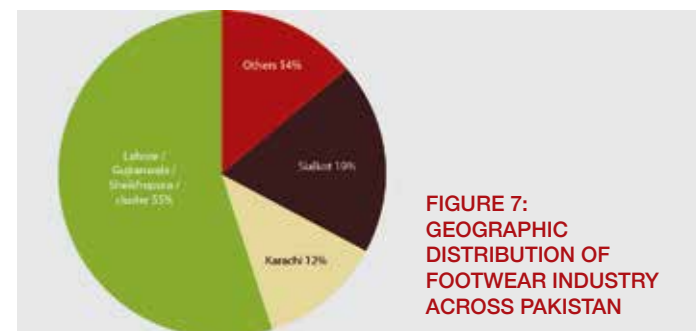


FIGURE 7: GEOGRAPHIC DISTRIBUTION OF FOOTWEAR INDUSTRY ACROSS PAKISTAN

### EMPLOYMENT IN THE INDUSTRY

**3.2.6** The footwear sector of Pakistan; is in general highly labor-intensive and a slow move towards automation and more mechanized manufacturing techniques is observed. Even within the organized sector, each machine needs an operator and a lot of work is still done manually. The heavy reliance on labor requires that several steps in shoe manufacturing still need to be performed manually and therefore require skilled labor, e.g. marking operations, lacing, folding operations, tread burning operations, etc. Similarly in the cottage industry, where there is little to no use of modern machinery, artisans with the help of small shoe making tools perform all the steps involved in shoe manufacture<sup>20</sup>.

**3.2.7** Skilled labor is not easily available locally. Even with the presence of demand for skilled machinists in this sector, there are only a few training institutes available to train and provide skilled workforce to this sector.

**3.2.8** Employment in the formal footwear industry can be classified under two groups, Permanent and Part time/Contractual; and Indirect employment.

**3.2.9** From our discussions with industry sources it was discovered that the split between permanent and part time labor is approximately 25%: 75% respectively.

**3.2.10** Skilled workers in the footwear sector, on aver-

age can earn as much as US\$300 (minimum) or more per month during peak production periods, as during this period the workers can earn up to US \$8-10 per day (8 hours shift and excluding overtime). Women have proved to be useful workers in stitching departments and earn the same wages as their male colleagues, although, as the survey shall reveal, their representation in this sector is low. At times, their professionalism and efficiency levels are reported as being even higher<sup>21</sup>.

**3.2.11** As far as the distribution of employment with respect to the geographical spread of the footwear industry is concerned, the total employment figure of the country for formal sector is estimated to be 60,000<sup>22</sup> and that of informal sector is estimated to be 150,000 (Total=210,000).

Lahore employs more than 55% people (out of 75% of Punjab) followed by Karachi which employs 17% (out of 19% of Sindh) and Sialkot which employs 20%. Province/region wise distribution of human resource employed in the footwear sector is depicted below:

| Province    | Human Resource Employed | Percentage Breakup |
|-------------|-------------------------|--------------------|
| Sindh       | 39,900                  | 19%                |
| Punjab      | 157,500                 | 75%                |
| Baluchistan | 2,100                   | 1%                 |
| KPK         | 10,500                  | 5%                 |
| Total       | 210,000                 | 100%               |

TABLE 13: DISTRIBUTION OF HUMAN RESOURCE



<sup>16</sup> SMEDA AND PFMA

<sup>17</sup> DATA RETRIEVED FROM: QUALITATIVE SURVEY OF SECTOR EXPERTS FROM PFMA, SMEDA AND LCCI

<sup>18</sup> WORLD FOOTWEAR YEAR BOOK, 2012, REPORT ON WORLD FOOTWEAR BY PORTUGUESE FOOTWEAR COMPONENTS AND LEATHERS GOODS MANUFACTURERS ASSOCIATION

<sup>19</sup> DATA RETRIEVED FROM SECTOR EXPERTS' INTERVIEWS OF BUREAU OF STATISTICS, TDAP AND PFMA

<sup>20</sup> REPORT ON: THE FOOTWEAR SECTOR IN PAKISTAN, EUROPEAN COMMISSION TRADE-RELATED TECHNICAL ASSISTANCE PROGRAM FOR PAKISTAN, 2007, INTERNATIONAL TRADE CENTRE

<sup>21</sup> DATA RETRIEVED FROM: QUANTITATIVE SURVEY OF ESTABLISHMENTS AND SECTOR EXPERTS FROM PFMA, INDUSTRY EXPERTS AND SMEDA

<sup>22</sup> SLIGHT DIFFERENCES WERE FOUND IN OPINIONS OF SOURCES BUT MAJORITY AGREED. SOURCES INCLUDE SMEDA, LCCI, TDAP, PFMA, EAC



| 64   |        | FOOTWEAR, GAITERS, & THE LIKE   |
|------|--------|---|
| 6401 |        | Waterproof Footwear, Rubber Or Plastics, Bond Sole                      |
|      | 640110 | Waterproof Footwear Incorporating a Protective Metal Toe-cap            |
|      | 640191 | Waterproof Footwear Covering the Knee                                   |
|      | 640192 | Waterproof Footwear Covering the Ankle                                  |
|      | 640199 | Other Waterproof Footwear With Outer Soles, Uppers of Rubber or Plastic |
| 6402 |        | Footwear, Outer Sole & Upper Rubber Or Plastic Nesoi                    |
|      | 640219 | Other Sports Footwear, Outer Soles and Uppers of Rubber or Plastics     |
|      | 640220 | Footwear, With Upper Straps Assembled to the Sole By Means of Plugs     |
|      | 640230 | Other Footwear, Incorporating a Protective Metal Toe-cap                |
|      | 640291 | Other Footwear, Covering the Ankle                                      |
|      | 640299 | Other Footwear With Outer Soles and Uppers of Rubber or Plastics        |
| 6403 |        | Footwear, Outer Sole Rub, Plastic Or Lea & Upper Lea                    |
|      | 640319 | Other Sports Footwear, Uppers of Leather                                |
|      | 640320 | Footwear With Outer Soles and Uppers of Leather                         |
|      | 640330 | Footwear Made On a Base or Platform of Wood, Uppers of Leather          |
|      | 640340 | Other Footwear, Incorporating Protective Metal Toe-cap,                 |
|      | 640351 | Footwear With Outer Soles and Uppers of Leather, Covering the Ankle     |
|      | 640359 | Other Footwear With Outer Soles and Uppers of Leather                   |
|      | 340391 | Footwear, Covering the Ankle, With Uppers of Leather                    |
|      | 340399 | Other Footwear With Uppers of Leather                                   |
| 6404 |        | Footwear, Outer Sole Rub, Plastic Or Lea & Upper Tex                    |
|      | 640411 | Sports Footwear With Outer Soles of Rubber or Plastics                  |
|      | 640419 | Other Footwear With Outer Soles of Rubber or Plastics                   |
|      | 640420 | Footwear With Outer Soles of Leather or Composition Leather             |
| 6405 |        | Footwear Nesoi  |
|      | 640510 | Other Footwear With Uppers of Leather or Composition Leather            |
|      | 640520 | Other Footwear With Uppers of Textile Materials                         |
|      | 640590 | Other Footwear  |
| 6406 |        | Parts Of Footwear: Insoles Etc.: Gaiters Etc., Parts                    |
|      | 640610 | Uppers and Parts Thereof, Other than Stiffeners                         |
|      | 640620 | Outer Soles and Heels, of Rubber or Plastics                            |

TABLE 14: FOOTWEAR GAITERS, & THE LIKE

## PRODUCTS

3.2.12 The domestic industry manufactures almost every type of footwear as classified in chapter 64 of 'HS classification system for traded goods' that can be broken down into the categories 6401 to 6406 at the 4-digit level. (Except few e.g. winter boots, Ski Boots etc.). The following table provides the product classification relevant to Pakistan's footwear export sector.

## 3.3 FOOTWEAR SECTOR TRADING AND GROWTH

3.3.1 The exports figures of Pakistan retrieved from TDAP Research and Development Team and Pakistan's Customs Tariffs (up to 2013) for the last 6 years reveals that the exports of Pakistan have seen a declining trend. However the industry did alleviate in 2008-09 when total exports amounted to US\$128 Million, but unfortunately in

the years to follow, footwear exports were declining at a decreasing rate and to date Pakistani footwear industry is struggling to achieve the same glory despite the increase in the prices of leather and leather goods all over the world.

3.3.2 Furthermore, as depicted in table 15 during the year 2007-08; export of leather footwear alone amounted to US\$105 million (highest in last 6 years) out of a total footwear exports of US\$124 million (in same year), it was followed by synthetics, plastics and other footwear during 2010-11 where their total amount of exports were US\$ 27 million (highest in last 6 years).

3.3.3 As depicted in the table above, footwear with uppers of leather or composition leather dominates the export sector, making up over 80% of the sector's exports. The exports of the uppers of composition leather are significant accounting for 48% of the sector's exports. Apart

| VALUE IN US\$ MILLION                       |           |         |         |         |         |         |
|---|-----------|---------|---------|---------|---------|---------|
| MAJOR ARTICLES                              | JULY-JUNE |         |         |         |         |         |
|   | 2012-13   | 2011-12 | 2011-12 | 2009-10 | 2008-09 | 2007-08 |
| FOOTWEARS                                   | 104,417   | 99,221  | 109,299 | 92,753  | 128,530 | 124,135 |
| (I) LEATHER FOOTWEAR                        | 83,473    | 80,039  | 80,926  | 67,070  | 102,883 | 105,359 |
| (II) CANVAS FOOTWEAR                        | 650       | 583     | 1,144   | 629     | 1,356   | 1,528   |
| (III) PLASTIC, SYNTHETIC AND OTHER FOOTWEAR | 20,294    | 18,600  | 27,229  | 25,053  | 24,291  | 17,248  |

TABLE 15: EXPORT FIGURES OF FOOTWEAR SECTOR OF PAKISTAN IN LAST SIX YEARS

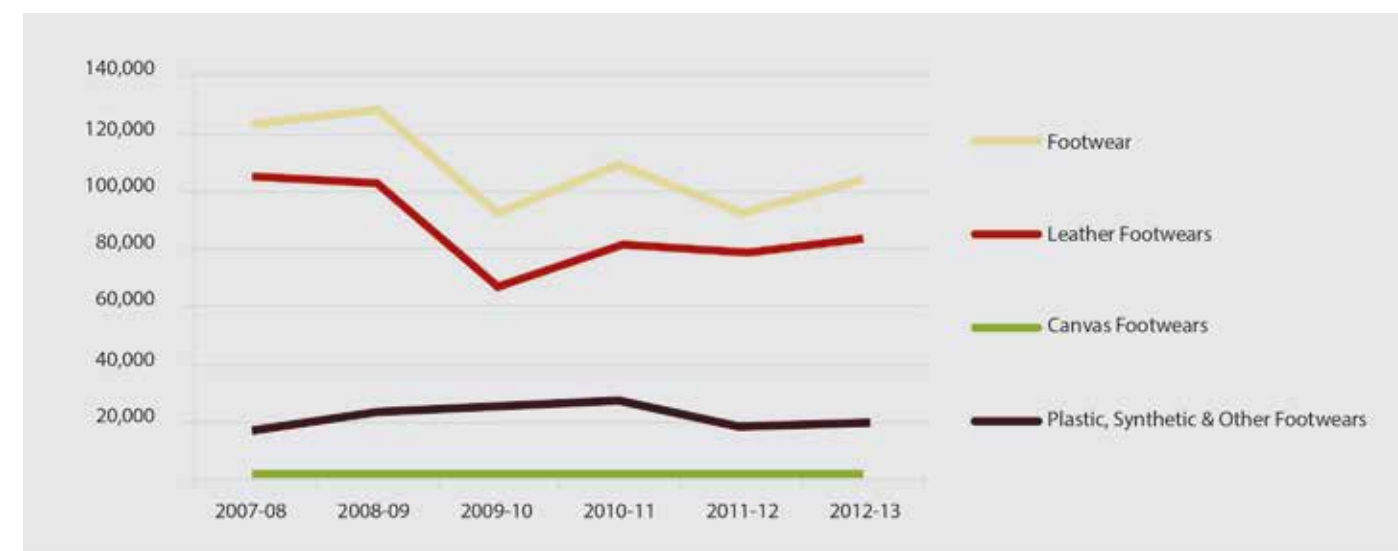


FIGURE 8: EXPORT TRENDS OF FOOTWEAR SECTOR OF PAKISTAN

| MAJOR ARTICLES       | Average | Growth rates (%) |         |         |         |           |
|----------------------|---------|------------------|---------|---------|---------|-----------|
|                      | 2008-13 | 2008-09          | 2009-10 | 2010-11 | 2011-12 | 2012-2013 |
| FOOTWEARS            | -2.09   | 3.54             | -27.84  | 17.84   | -9.22   | 5.24      |
| (I) LEATHER FOOTWEAR | -2.66   | -2.35            | -34.81  | 20.66   | -1.1    | 4.29      |
| (II) CANVAS FOOTWEAR | -4.11   | -11.26           | -53.61  | 81.88   | -49.04  | 11.49     |
| (III) OTHER FOOTWEAR | 6.02    | 40.83            | 3.14    | 8.69    | -31.69  | 9.11      |

TABLE 16: PERCENTAGE CHANGE IN EXPORTS FOR LAST SIX YEARS

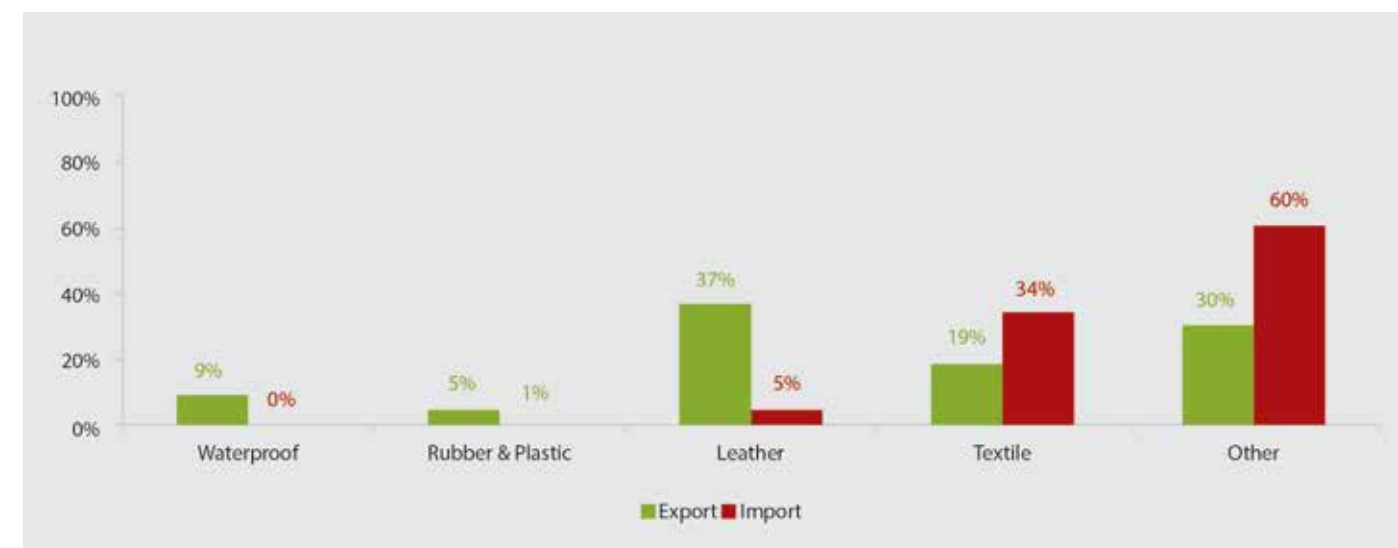


FIGURE 9: VARIOUS FOOTWEARS' IMPORTS/EXPORTS TRENDS

from leather the contribution of Canvas Footwear is approximately 1% whereas the contribution of Plastics, synthetics and other footwear is recorded at approximately 19%.

**3.3.4** Synthetics, and other footwear materials, mainly rubber/plastic slippers and rubber upper footwear, have dominated imports for Pakistan (more than 60% of footwear imports) in recent years, followed by textiles/canvas footwear (34%).

**3.3.5** There is however an opportunity for the Pakistan footwear industry to increase exports in future, due to the fact that there is a potential demand for middle to lower ranged Pakistani products in the international market. Moreover, factors such as; recent anti-dumping laws imposed on China and Vietnam, rise in labor cost in China, devaluation in Pak rupees and ease on trade policies by government, serve as a window of opportunity to increase footwear exports in future.

**3.3.6** Based on above mentioned facts and figures, consultants believe that the Pakistan's Footwear industry has great potential for growth. There is a demand in international market for Pakistani footwear products, coupled with the fact that demand is increasing locally as well. Consultants also believe that if the industry is able to keep up with the growing demand in the near future and tackle the challenges of keeping up with changes in modern technology; the Pakistani footwear industry can be a sustainable and profit generating sector in a long run.

### 3.4 TRADE AND MAJOR TRADING PARTNERS

**3.4.1** The top four export destinations of Footwear articles from Pakistan were Germany, U.A.E, Italy and United Kingdom during the year 2012-2013. Similarly the top exports destinations of Pakistani Leather footwear were Germany, Italy, France and U.A.E<sup>23</sup>. As depicted below Germany and Italy are Pakistan's main markets, closely followed by the United Arab Emirates and Saudi Arabia. Exports to Afghanistan and Saudi Arabia have considerably declined due to increased Chinese exports to these countries.

**3.4.2** China has been Pakistan's main supplier for Footwear articles, more than 63% footwear articles by volume were imported from China during the last few years followed by Thailand whose contribution in total Pakistani Footwear imports was 31%. The figure below enlightens the above facts in more detail;

### 3.5 KEY CHALLENGES FACING THE FOOTWEAR SECTOR

**3.5.1** It is anticipated that footwear exports will grow manifold now that Pakistan has been awarded zero/low duty export by the European Union and also the greater part of leather footwear manufactured domestically is exported. However the industry is facing some key challenges which need to be addressed for sustainable growth of

the sector.

**3.5.2** The key challenges mentioned below are based on secondary research conducted for this study and our interviews and discussions with various industry stakeholders such as footwear manufacturers/exporters, government bodies, economists, consultants and researchers (details of the aforementioned representatives are mentioned in annexure). What follows are their views and opinions on key challenges present in raising exports from the footwear sector in Pakistan.

- Inconsistent/non-focused/rapidly fluctuating government policies have always remained a bottleneck
- Footwear buyers around the globe have become more selective and more demanding when it comes to designs and quality. The overall trend has shifted towards buying more innovative designs and in smaller quantities. The footwear industry in Pakistan has not kept up-to-date when it comes to latest designs/trends and innovative manufacturing processes. In order to effectively survive in the international market, companies must keep themselves updated of latest trends, designs of the international market and continuously assess their capabilities in order to update their processes and machinery and towards managing their profitability accordingly. Government assistance in developing such skills would assist in this regard.
- The political and security situation is highly volatile in Pakistan, making it insecure for local and especially foreign investment. Law and order issues scare export customers: buyers are hesitant to visit Pakistan due to apprehension about personal security.
- Downstream Supplier/Vendor industry support is less than desired. The footwear industry has neither big suppliers nor a wide range and variety of accessories makers, like buckles, ornaments, thread, etc. to support them. Thus, all these materials have to be imported, which impacts profitability and timelines. The suppliers providing this sector are characterized by variable quality sometimes to within a single consignment. This in turn impacts Companies, who are finding it difficult to control the quality of their products or in meeting their time commitments.
- SMEs cannot make use of latest technology, which is needed for quality products. Due to limited resources, product development is not of export standards.
- There is a shortage of training institutes, research work and quality control laboratories in the footwear industry.
- Very few training institutes for footwear designing are using modern technology. Mostly labor learns the process of shoe making on the job.
- There is a shortage of technical and supervisory staff in 'Footwear Training Service Providers' to meet the challenges of the international market. There is a need for footwear fashion design institutes that are equipped with latest CAD/CAM systems.

- There is a shortage of proper R&D facilities related to footwear. The Government also needs to work on the creation of new and upgrading of existing R&D facilities. The Pakistan Council for Scientific and Industrial Research (PCSIR) standards has long become almost irrelevant for this sector. ISO 9001 has now replaced PCSIR standards and only few large scale companies have these standards implemented in their organizations<sup>24</sup>.
- SMEs cannot make use of latest technology, which is needed for quality products. Due to limited resources, product development is not of export standards.
- Industry is facing high competition from China providing cheaper footwear product in markets.
- The challenge faced by small scale / informal manufactures is taking advantage of credit friendly schemes that SME banks are providing for small enterprises. The informal sector which mainly comprises of small scale firms are mostly unregistered, where there is no proper documentation or tax returns filed, as a result they are unable to take advantage of the friendly credit schemes available. Thus in order to channel finance in these sectors these small scale firms need to become credit worthy, this in return would give them access to these loans and allow them to expand their business and product lines, and would decrease their dependency on Government for credit friendly loans.
- Participation in international exhibitions/extensive marketing. Presently, companies are participating in very few international exhibitions every year.
- Worldwide, Europe and America are ready to buy more shoes. However, customers want fashionable shoes at competitive prices and timely delivery of orders, areas in which Pakistani exporters struggle. Due to this, Pakistan's industry staggers behind in exports. Product design and fashion is a key factor that seems lacking in the footwear sector and represents an opportunity for skills enhancement in the future<sup>25</sup>.

### DEMAND AND SUPPLY OF SKILLS IN THE FOOTWEAR SECTOR

**3.5.3** The sector seems to find itself caught in a situation where there is a lack of skilled labor force. The labor available requires up gradation in their knowledge and skills to incorporate, the anticipated advancements in machinery/equipment and use of more automated processes in future. Outdated production methods are still prevalent in shoe factories<sup>26</sup>. Industry experts pointed out that owners of establishments are upgrading equipment and trying to meet requirements of international buyers. However, the supply of skilled and qualified manpower to correspond to the overhaul in manufacturing processes is not keeping pace with the rate of automation.

**3.5.4** The above described scenario is not unique. In

general, there is a shortage of trained human resource in the industry across all levels<sup>27</sup>. This shortage is more severe at the lower level or shop floor level, which holds significant proportion of the workforce employed in this sector. Currently, skilled workforce comprises mainly of those who have worked for years in the industry and have acquired a particular skill set only, but have no other transferable or upgradable skill sets e.g. a stitcher or pattern maker does not have any knowledge or he does not prefer to learn anything about the processes before and after stitching or pattern making.

**3.5.5** There are a few reputable training institutes catering to this sector, such as the Institute of Leather Technology, the Charsadda institute KPK and TEVTA. However, as a whole, there are not many institutions available to cater to the demand for skilled workforce for the sector. As a result, all the major players employ unskilled workers and provide them on-the-job/in-house training. Most of the players do not face issues in getting the required quantity of workers, but getting trained workers has been and remains a constant problem for the industry<sup>28</sup>.

**3.5.6** Apart from skilled workers, there is also shortage of skilled human resource for important support functions like designing, merchandising and product development and this shortage is expected to become acute over the years as the industry progresses.

**3.5.7** Furthermore, based on the findings retrieved from the industry experts from industry associations and bodies contacted for the purpose of this study, it is observed that there is no a mechanism for collaboration between industry units, other related research organizations and academic institutions to improve productivity of this sector. It is to be noted that the more reputed TSPs have established well defined lines of communication but they remain the exceptions that prove the rule. Industry representatives are of the view that the skill demand generated by the market/ employers are not matched by the present skill inventory developed by the institutes.

### 3.6 TRAINING SUPPLY

**3.6.1** Before we explore the footwear training supply in Pakistan and around the globe it will be of great assistance that we first look into the formal and vocational/technical training/education system in Pakistan available for all trades including the footwear sector. The key information regarding Pakistan's technical and vocational training system is attached as annexure.

**3.6.2** Scope of this study is mainly concerned with steps I (up to Middle School) and with step II (Secondary School and Intermediate/Diploma Education). The training towards skilled and semi-skilled worker in several sectors (including footwear sector) is done under vocational training system within one of the Vocational Training Centre (VTC) and Technical Training Centre (TTC), mainly run by the provincial governments or through on-the-job training as an apprentice in a manufacturing concern. They offer one and two year courses, leading to Grade III &

<sup>23</sup> RESEARCH AND DEVELOPMENT TEAM TDAP, PFMA AND BUREAU OF STATISTICS

<sup>24</sup> QUALITATIVE/IN-DEPTH INTERVIEW FROM PFMA AND INDUSTRY EXPERT FROM ELEGANT SHOES

<sup>25</sup> QUALITATIVE/IN-DEPTH INTERVIEW FROM TDAP

<sup>26</sup> DATA RETRIEVED FROM: PRIMARY RESEARCH CONDUCTED FOR THE STUDY

<sup>27</sup> PFMA AND SMEDA

<sup>28</sup> PRIMARY RESEARCH (IN-DEPTH INTERVIEWS)



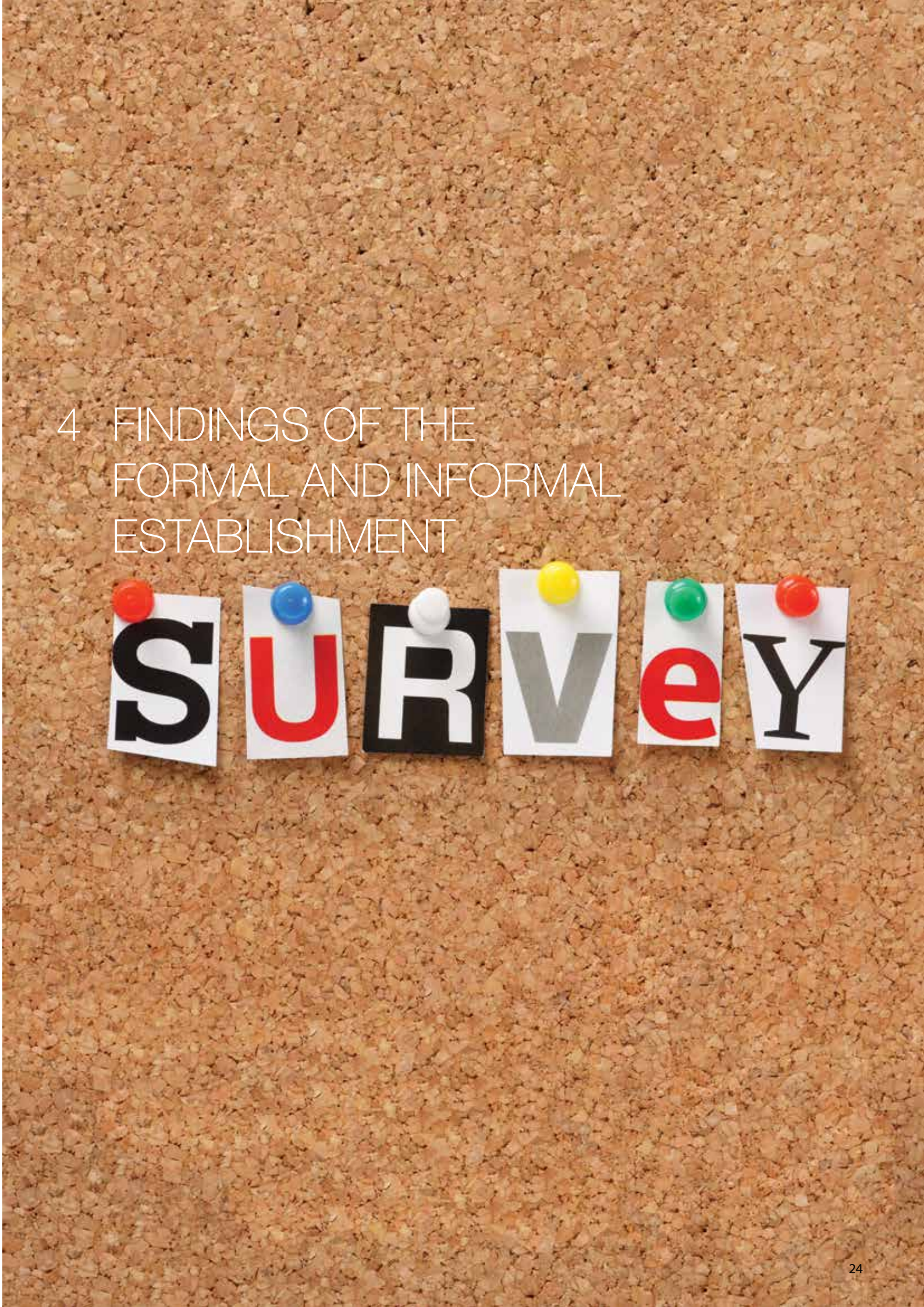
Grade II. In addition short-term courses are also offered. Step III, training towards a diploma, is well established and recognized within the footwear industries. Although approximately 60% of the training is related to practical work (according to the current curriculum), but due to lack of materials and tools in training centers practical work is very often neglected. Because of this, graduates employed by the industry have very little practical knowledge at the time of joining and they become productive after going through a series of on the job trainings.

**FOOTWEAR TRAINING PROVIDERS- PUNJAB (PAKISTAN)**

3.6.3 Based on the desk research conducted for the study, the following institutions/TSPs are playing a role in providing education and training and narrowing the gap between skills demand and supply in the Footwear industry of Pakistan:

| Institute                                       | Courses Offered   | Duration   | Key Course Content  |
|---|---|------------|---|
| TEVTA –Footwear Institute of Leather Technology | DAE Leather Technology  | 3 years    | Shoe Designing, Modeling, Grading, Manufacturing, Quality Control   |
|   | Diploma   | 1 year     | Shoe Designing, Modeling, Grading, Manufacturing, Quality Control   |
|   | Certificate (Vocational)  | 3-6 months | Shoe Designing, Modeling, Grading, Manufacturing, Quality Control   |
| Pakistan Institute of Fashion & Design          | Bachelor Design of Leather Accessories & Footwear   | 4 years    | Designing & Sketching   |
| UMT School of Textile & Design                  | Bachelor of Fashion Design  | 4 years    | Drawing Rules/Styles Of Shoes, Shoe Sizes, Panel Making, Material Management, Waste Management, Introduction To Stitching Techniques (Machine/Hand),- Closing, CAD And Use Of Other Designing Software, Shoe Repair TQM |
|   | Bachelor of Science in Leather Technology   | 4 years    | Basic Shoe Designing /Techniques, Designs For Men's And Women's, Waste Management Techniques In Cutting, Introduction To Stitching Techniques (Machine/ Hand),CAD And Use Of Other Designing Software                   |
| Pakistan Institute of Modern Studies            | Diploma in Leather Technology   | 6-months   | Designing/Sketching, Stitching/ Sewing, Material Technology, Product Development, Quality Assurance/Control   |
| Charsadda                                       | Certificate programs in cutting, stitching, sewing, closing, upper making, designing/sketching, last making | 6 months   | Designing, sketching, closing, upper making etc.  |

TABLE 17: TRAINING PROVIDERS





4.1 RESPONDENT'S PROFILE

4.1.1 This section provides brief profiles of the respondent companies (formal/informal) based on the results and analysis of the quantitative survey of footwear manufacturing units. This section will also provide an insight on;

- Respondents' organization size,
- Annual production and sales turnovers,
- Export status,
- Type of footwear they are manufacturing
- Skills availability and skills gap etc.

ORGANIZATION SIZE AND RESPONDENTS' DISTRIBUTION

4.1.2 For the purposes of analysis, respondent organizations were categorized into four categories namely,

- Micro
- Small
- Medium
- Large scale organizations

4.1.3 The number of employees was used to determine the size of the organizations as defined by the Small and Medium Enterprise Development Authority (SMEDA) – Ministry of Industries and Production. This classification along with the number of respondents in each category is presented in the table below:

| S. No. | Classification | Number of Employees     | Number of respondents |
|--------|----------------|-------------------------|-----------------------|
| 1      | Micro          | Less than 10 employees  | 85                    |
| 2      | Small          | 11 – 30 employees       | 33                    |
| 3      | Medium         | 31 – 99 employees       | 14                    |
| 4      | Large          | 100 and above employees | 15                    |

TABLE 18: ORGANIZATION SIZE CRITERIA

4.1.4 Additionally, figure 10 below depicts a graphical distribution of respondent companies with respect to the nature of establishment i.e. Formal (registered units) and informal (unregistered units) and size.

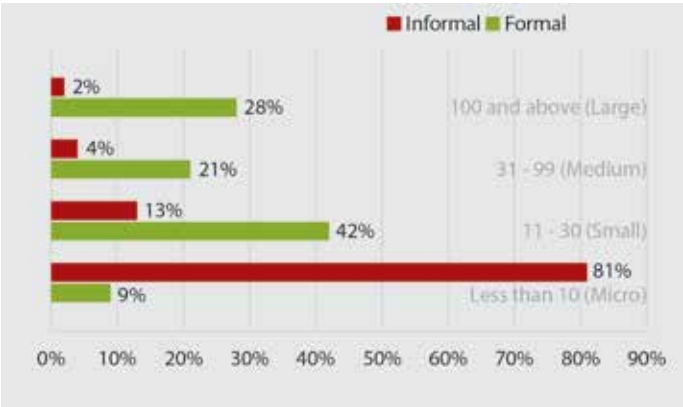


FIGURE 10: BIFURCATION OF RESPONDENT COMPANIES WITH RESPECT TO NATURE AND SIZE OF COMPANIES

| Size of Company       | Formal Units | Informal Units |
|-----------------------|--------------|----------------|
| Less than 10 (Micro)  | 4            | 81             |
| 11 - 30 (Small)       | 20           | 13             |
| 31 - 99 (Medium)      | 10           | 4              |
| 100 and above (Large) | 13           | 2              |

TABLE 19: FORMAL AND INFORMAL ESTABLISHMENTS

4.1.5 As is evidenced above (Table 19), the majority of our respondents corresponded to micro level organizations belonging to the informal (unregistered) sector. Whereas large scale organizations were mostly found to be registered (except 2 organizations which reported to be un-registered or informal). This is in line with the general sector profile and the intended sampling described in Chapter 2.

4.1.6 Furthermore it can be seen that micro level companies are clustered more around southern and northern Punjab. Geographical spread is further described in the table and chart below. Further a map of Punjab clearly depicting these clusters, is also mentioned below (Figure 11) for more clarity:

| Organization Size     | North Punjab | South Punjab | Central Punjab |
|-----------------------|--------------|--------------|----------------|
| Less than 10 (Micro)  | 20           | 27           | 38             |
| 11 - 30 (Small)       | 2            | 5            | 26             |
| 31 - 99 (Medium)      | 2            | 1            | 11             |
| 100 and above (Large) | 1            | 1            | 13             |

TABLE 20: REGION WISE ORGANIZATION BREAKUP

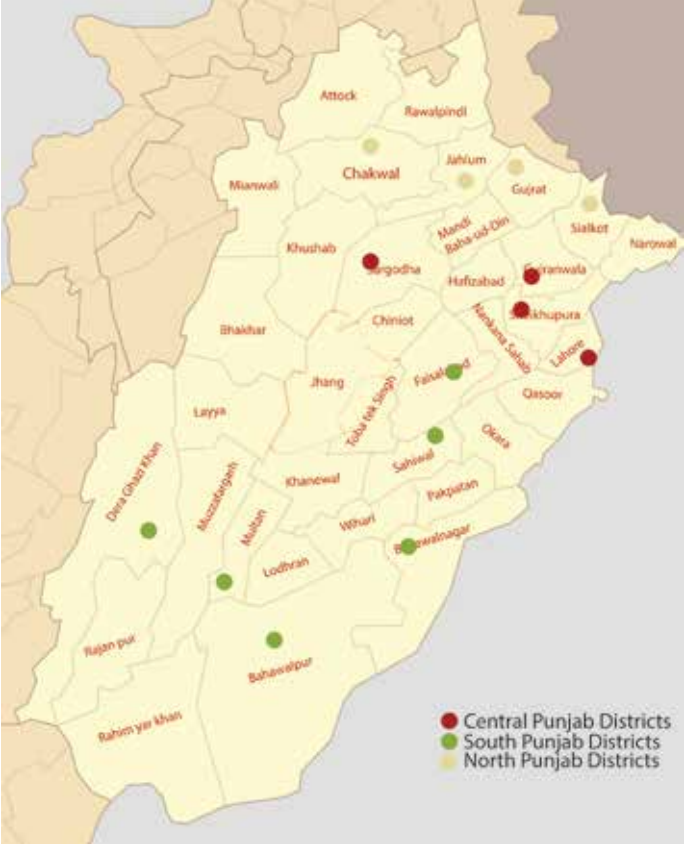


FIGURE 11: FOOTWEAR CLUSTERS IN PUNJAB

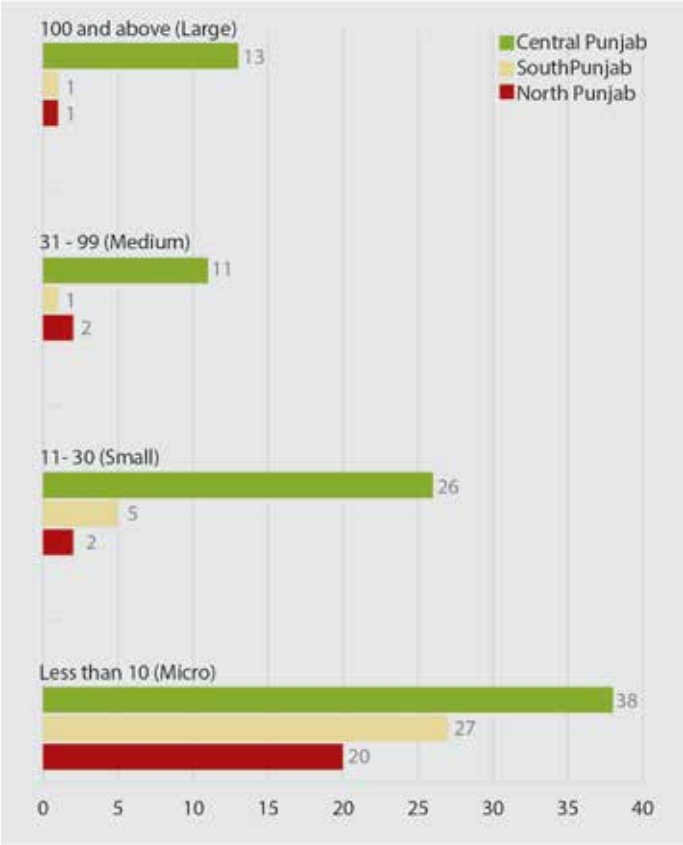


FIGURE 12: GEOGRAPHICAL SPREAD

NUMBER OF EMPLOYEES

4.1.7 The table below (table 21) depicts the total number of employees with respect to the 'size of the company. It can be seen that majority of the workforce is employed in large scale organizations (average 407 employees per unit) as depicted in figure 13 below.

| Organization Size | Size of Company       | Overall Results                |                  |
|-------------------|-----------------------|--------------------------------|------------------|
|                   |                       | No. of Units Covered in Survey | No. of Employees |
|                   | Less than 10 (Micro)  | 85                             | 665              |
|                   | 11 - 30 (Small)       | 33                             | 516              |
|                   | 31 - 99 (Medium)      | 14                             | 898              |
|                   | 100 and above (Large) | 15                             | 6,109            |
|                   | Total                 | 147                            | 8,188            |

TABLE 21: NUMBER OF EMPLOYEES WITH RESPECT TO ORGANIZATION SIZE

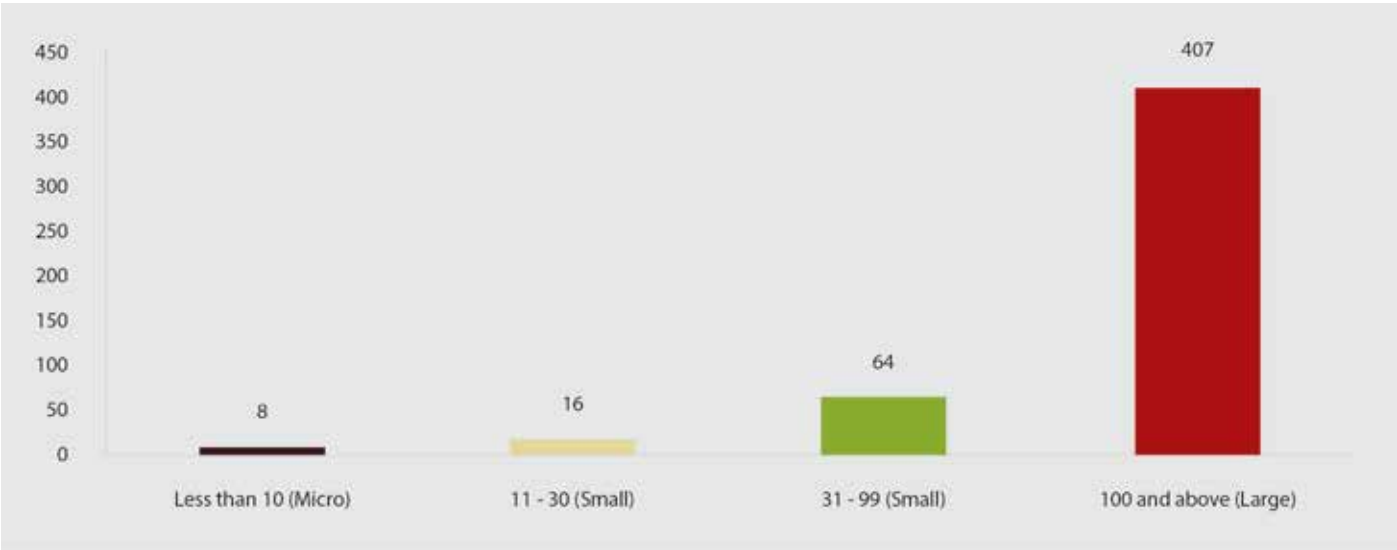


FIGURE 13: NO. OF EMPLOYEES PER UNIT



ANNUAL SALES TURNOVER

4.1.8 Accurate revenue figures were not forthcoming from respondents as respondents generally do not report these figures. Respondents were more comfortable providing ranges which were suitable for the purposes of the survey. Approximately 58% of the respondent organizations declared their annual sales turnover to be less than PKR 1 million followed by 22% reporting sales turnover lying in the range of 1 – 10 million PKR. Only 10% respondents proclaimed their annual sales turnover above PKR 31 million. Details are shown in table 22 below:

| Amount                  | Units | %  |
|-------------------------|-------|----|
| Less than 1 Million     | 85    | 58 |
| 1 Million - 10 Million  | 33    | 22 |
| 11 Million - 30 Million | 14    | 10 |
| 31 Million and above    | 15    | 10 |

TABLE 22: ANNUAL SALES TURNOVER

ANNUAL PRODUCTION

4.1.9 It is seen (figure 14) that 57% of the respondent organizations are producing up to 10,000 pairs of shoes annually while 14% are producing more than 60,000 pairs. Out of 14% (21 companies) respondent companies producing more than 60,000 pairs the results<sup>29</sup> indicate that 9 companies are producing more than a million pairs per annum.

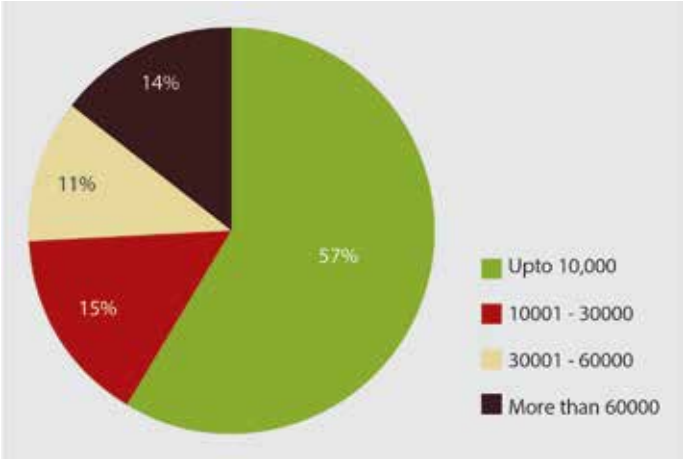


FIGURE 14: ANNUAL PRODUCTION (NUMBER OF PAIRS)

4.1.10 A clearer picture is portrayed by a cross-sectional analysis of annual sales turnover and annual production. It can be seen around 90% of the establishments producing up to 10,000 pairs declared their annual sales turnover to be less than PKR One Million and 82.5% of them are lying in the category of micro level organizations. More than 70% of the organizations producing above 60,000 pairs of footwear are from the large scale sector and nearly 65% of them reported annual sales turnover above 31 Million PKR.

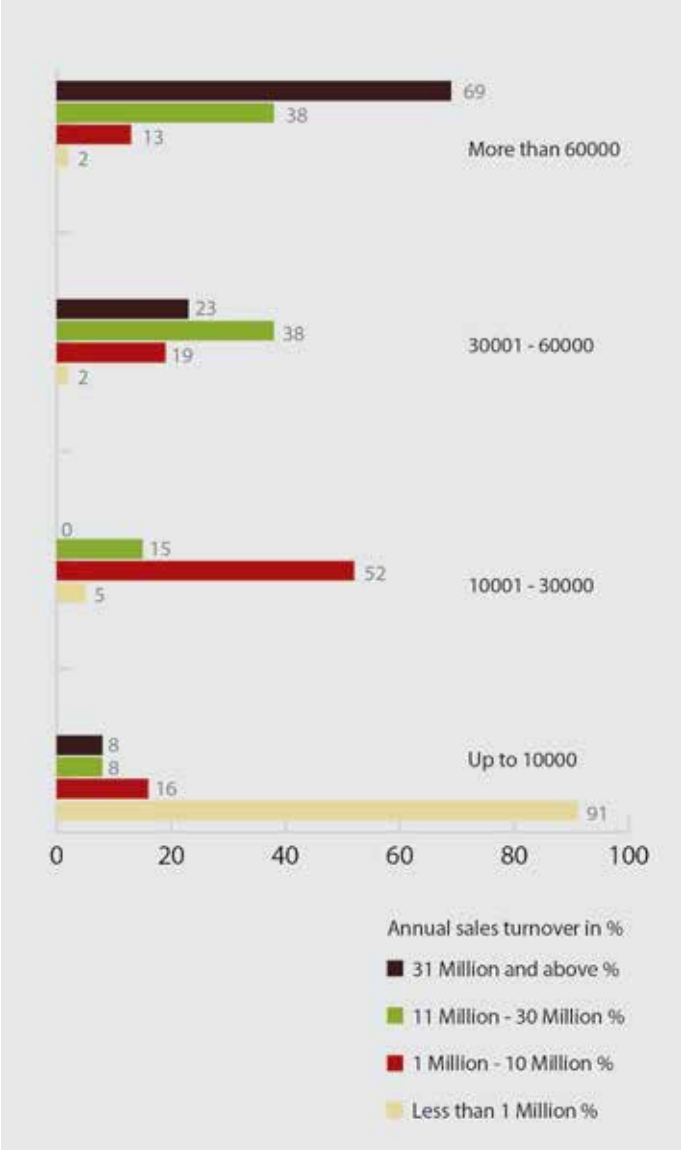
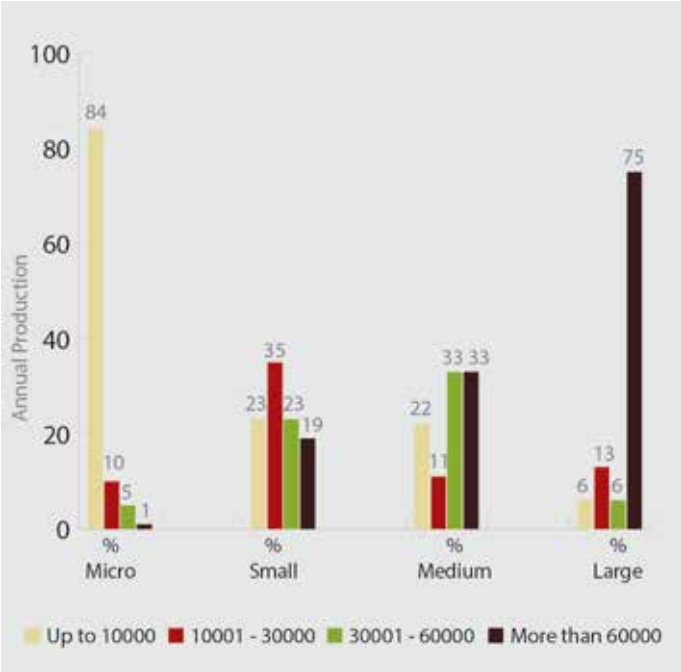


FIGURE 15: ANNUAL PRODUCTION (NO. OF PAIRS) V/S ORGANIZATION SIZE AND ANNUAL PRODUCTION VS ANNUAL SALES TURNOVER



EXPORTS

4.1.11 The results of the study revealed that only 26 establishments were exporters; of which 17 organizations were formal (registered) units while 9 were informal (un-registered) units.

| Export Products | Overall | Formal | Informal |
|-----------------|---------|--------|----------|
|                 | Units   | Units  | Units    |
| YES             | 26      | 17     | 9        |
| No              | 121     | 30     | 91       |
| Total           | 147     | 47     | 100      |

TABLE 23: EXPORTS

TYPE OF FOOTWEAR (BASE MATERIAL)

4.1.12 In terms of base material, it appeared that the majority of the respondents are involved in pure leather production followed by synthetics and composites (companies involved in production of more than one base material) respectively.

|                                     |     |
|-------------------------------------|-----|
| Pure Leather                        | 30% |
| Synthetic/Artificial/Patent Leather | 23% |
| Composites                          | 21% |
| Rubber                              | 14% |
| Textile/Fabric/Canvas               | 6%  |
| Plastic                             | 6%  |

TABLE 24: TYPE OF FOOTWEAR PRODUCTION

TYPE OF PRODUCTS/ARTICLES

4.1.13 The various types of footwear products manufactured are shown as under:

- Men Shoes
- Women Shoes and
- Children Shoes

4.1.14 It is evident from the findings of the survey, and perhaps attributed to the climate and culture of Pakistan, that consumers prefer to purchase open shoes such as sandals and slippers/flip-flops. Men, women and children all look towards buying sandals and slippers/flip-flops. It has also become apparent that the formal units mostly focus on the manufacturing of upper leather and outer sole leather, whereas informal units are highly oriented towards manufacturing of sandals/flip flops.

MEN SHOES

4.1.15 From the survey it has emerged that 60% of the formal respondents are involved in manufacturing of upper leather for men whereas 55% of the informal respondents are catering towards manufacturing of Sandals. The product category distribution of products in the sample



<sup>29</sup> BASED ON FIGURES RETRIEVED FROM COMPANIES' OWN WEBSITES (AUDITED STATEMENTS AVAILABLE ONLINE, ETC.), SECONDARY SOURCES (MENTIONED IN ANNEXURE 2- SOURCES OF INFORMATION) AND IN-DEPTH INTERVIEWS WITH EXPERTS/REPRESENTATIVES FROM THESE COMPANIES ETC. FEW COMPANIES (OUT OF THESE 11) LIKE BATA, SERVICE AND ENGLISH BOOTS ETC. ARE EVEN PRODUCING UP TO 5 MILLION PAIRS ANNUALLY.

respondents is given below:

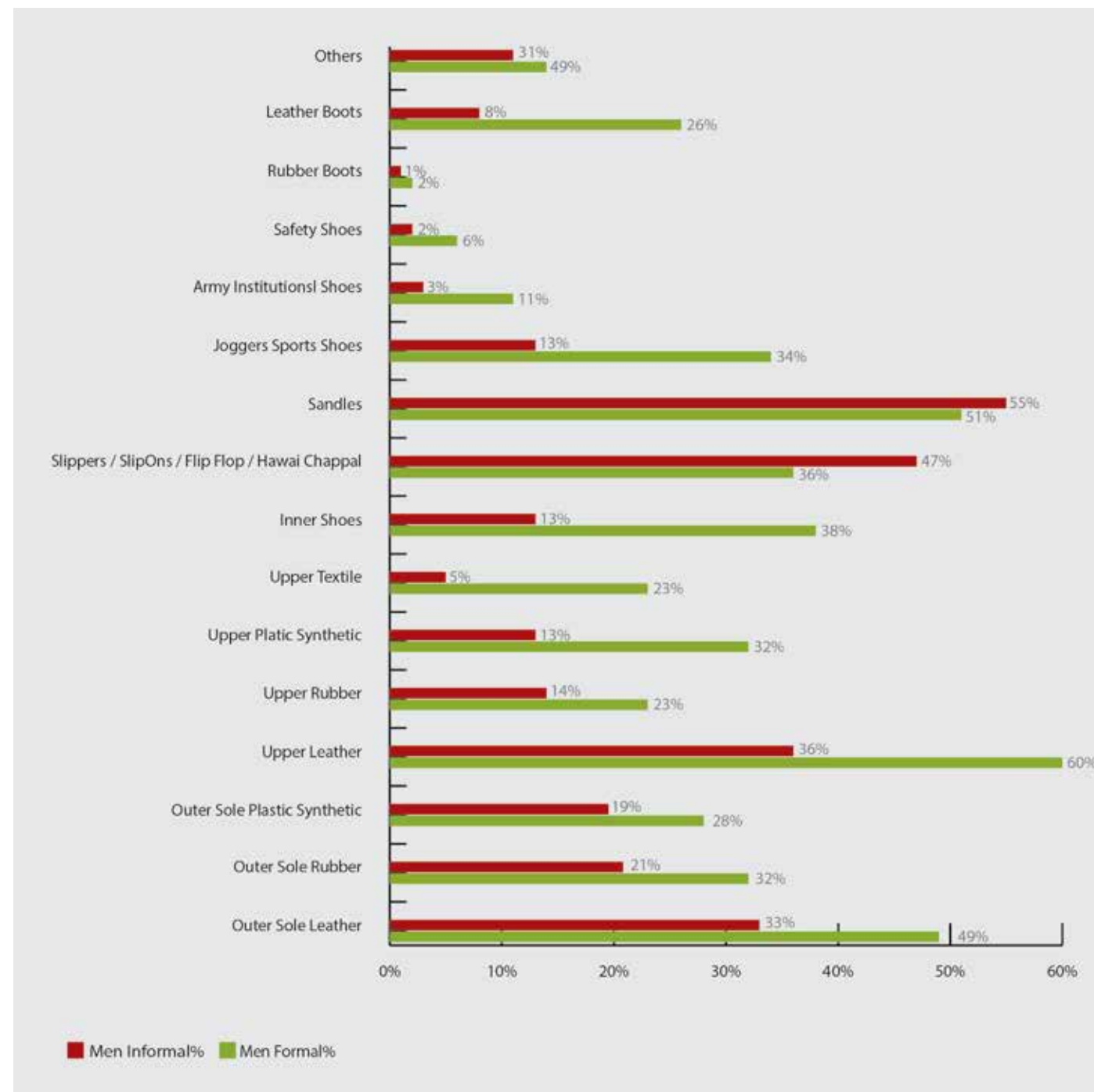


FIGURE 16: MEN SHOES

## WOMEN SHOES

**4.1.16** Out of a survey population of 147 respondents up to 40% of the formal units are involved in manufacturing of women's upper leather shoes. It is further apparent that 38% of formal units are towards manufacturing of women Slippers/Flip Flops followed by 34% and 30% of formal units which are towards manufacturing of Outer Sole Rubber and Outer Sole Plastic Synthetic manufacturing respectively. Whereas informal units are more into manufacturing of slippers and sandals for women.

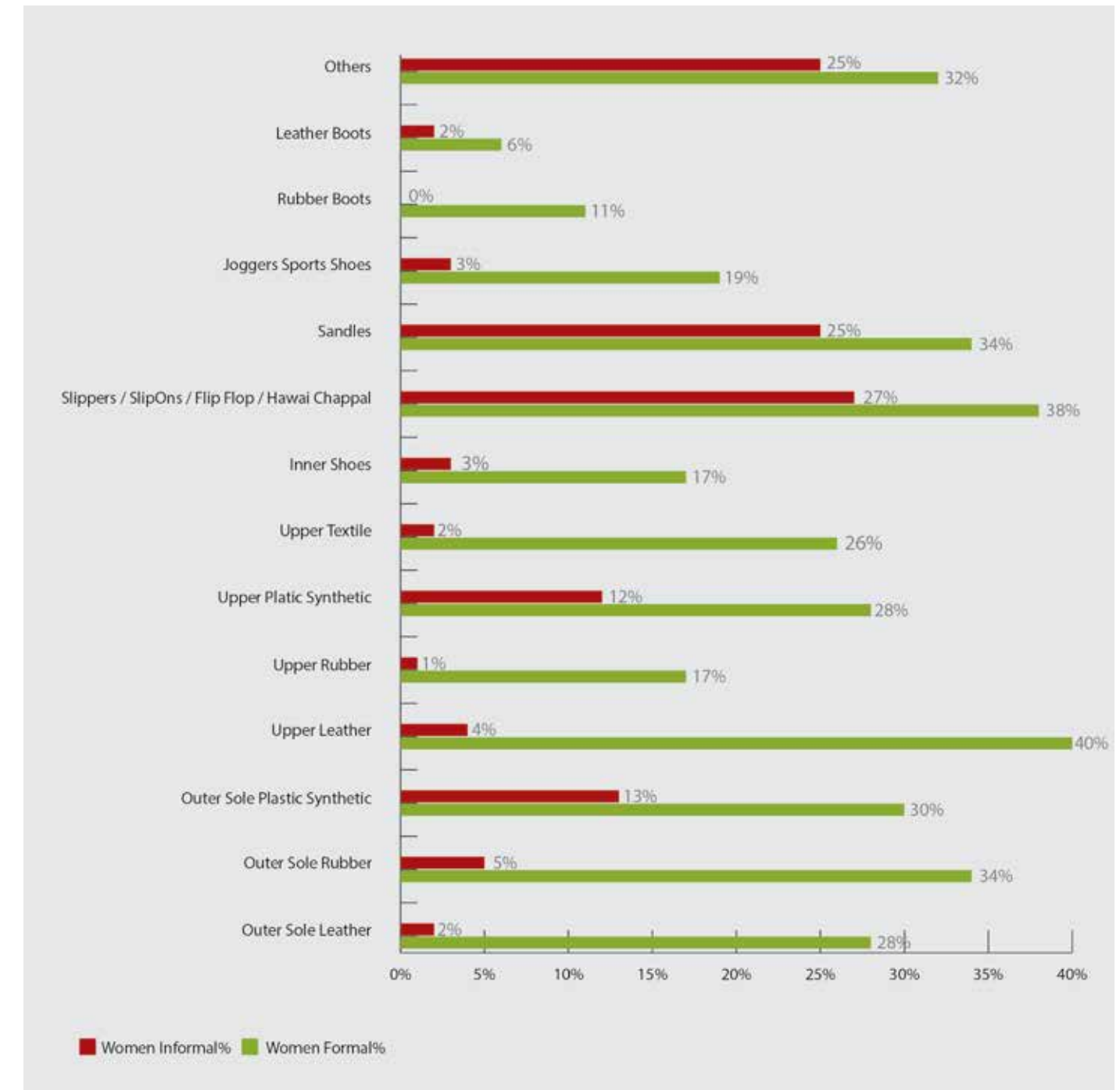


FIGURE 17: WOMEN SHOES

## CHILDREN SHOES

**4.1.17** Similarly, 30% of the formal units were geared towards manufacturing children Sandals, Slippers/Flip Flops followed by 28% and 26% of formal units which are involved in manufacturing Upper leather and Outer Sole Rubber respectively. And informal units are, again, involved in manufacturing Sandals and Slippers for children.



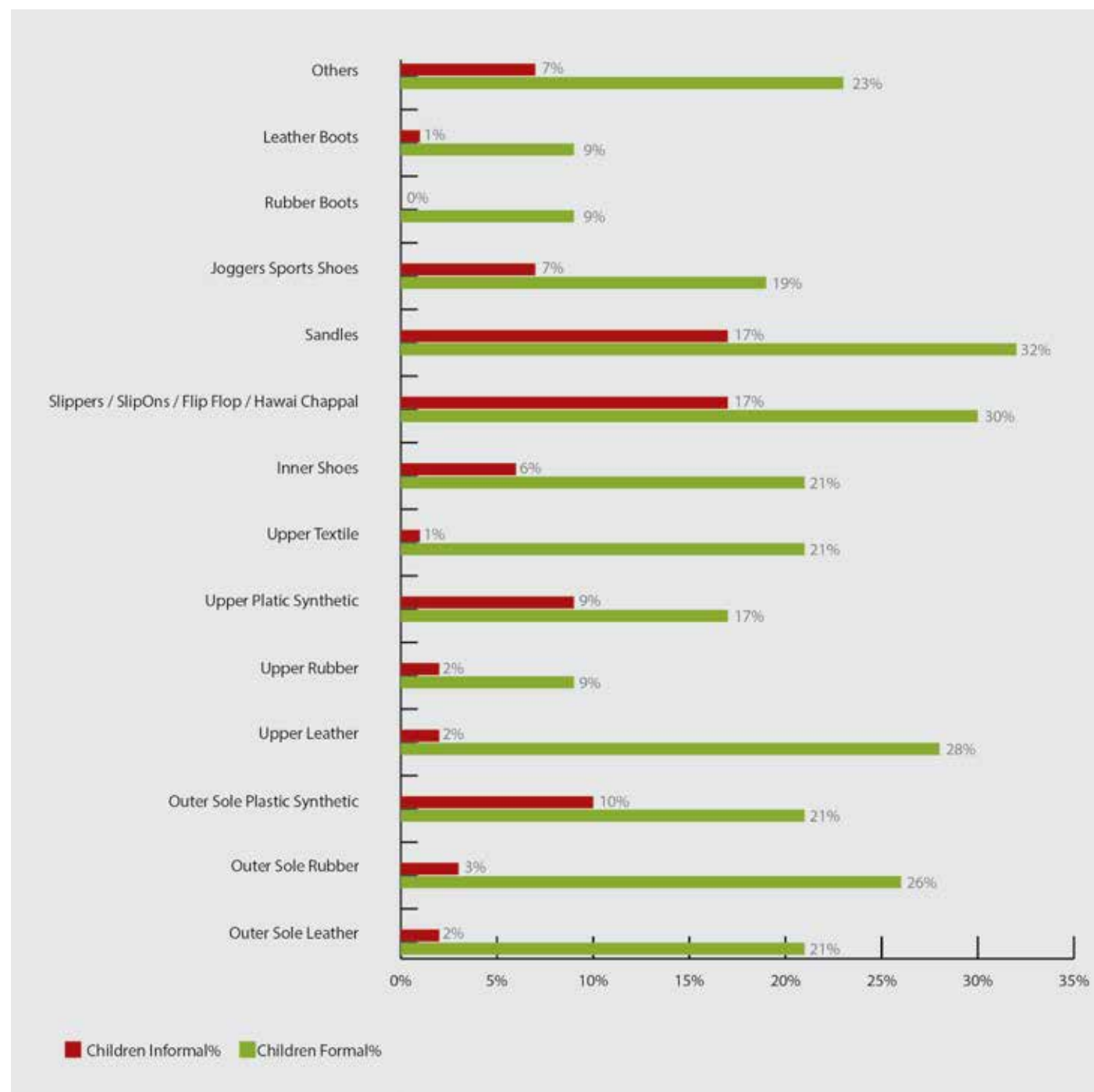


FIGURE 18: CHILDREN SHOES

**4.1.18** Overall it can be seen from the table 25 and figure 19 below that majority of the formal and informal units are involved in manufacturing of men shoes (44.2%) followed by women and children. Further there were 37 companies which are involved in manufacturing of all above shoes category (men, women and children).

| Products/ Articles    | Formal | Informal | Total |
|-----------------------|--------|----------|-------|
| Men                   | 20     | 45       | 65    |
| Women                 | 8      | 20       | 28    |
| Children              | 5      | 12       | 17    |
| Men/ Women / Children | 14     | 23       | 37    |

TABLE 25: TYPE OF ARTICLES/PRODUCTS (OVERALL)

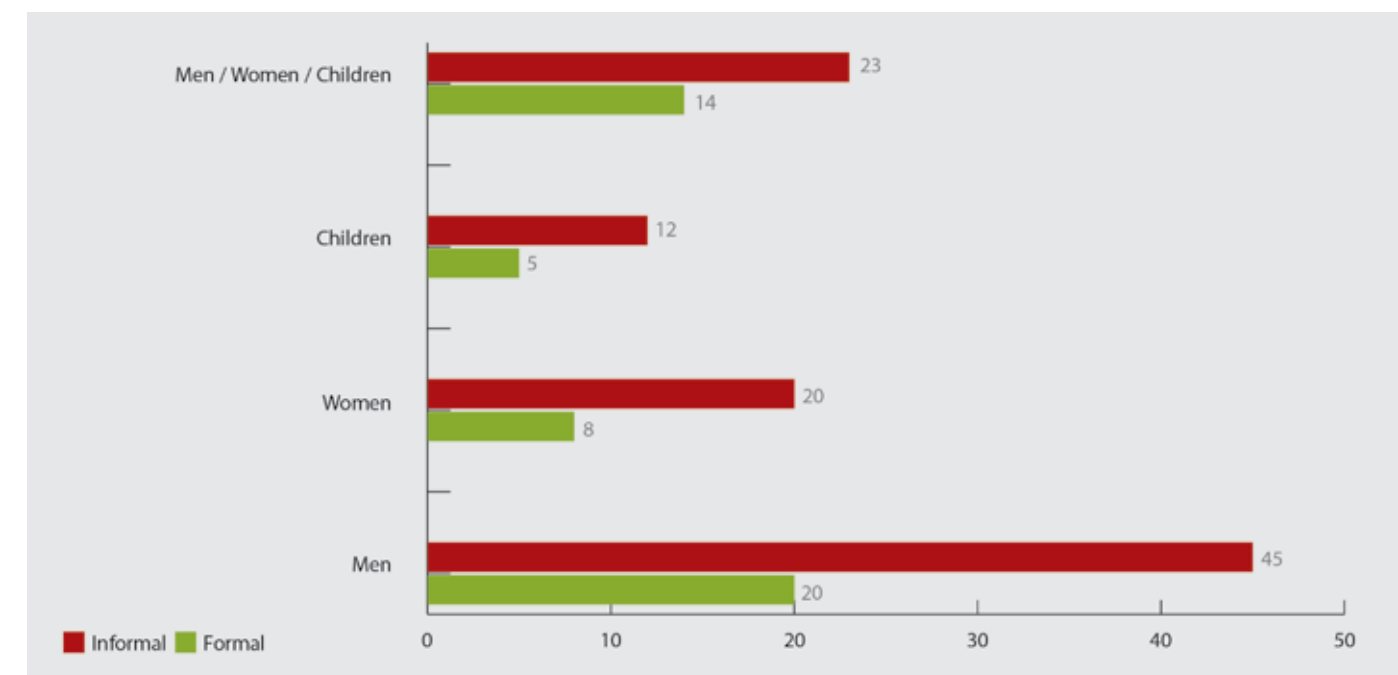


FIGURE 19: TYPE OF ARTICLES/PRODUCTS (OVERALL)

## 4.2 WORK FORCE CHARACTERISTICS - FOOTWEAR SECTOR

### NUMBER OF EMPLOYEES

**4.2.1** The table below depicts the total number of employees with respect to the 'nature of company' (i.e. formal/informal). It is evident from the figures below that majority of the work force is employed in the formal sector as compared to the informal sector:

| Number of Employees with respect to Nature of Companies |                   |                 |           |            |
|---|-------------------|-----------------|-----------|------------|
| Organiza- tion Size                                     | Nature of Company | Overall Results |           |            |
|   |                   | No. of Units    | Employees | Percentage |
|   | Informal          | 100             | 1,695     | 21         |
|   | Formal            | 47              | 6,493     | 79         |

TABLE 26: NUMBER OF EMPLOYEES

### AGE PROFILE

**4.2.2** The majority of the work force in the footwear sector falls into the age group of 21-30 years and 31-40 years (more than 70%). This situation is uniform in both the formal sector as well as the informal sector.

**4.2.3** The average age of entry of a worker into this sector is 16years and above and that it is the formal sector that tends to induct workers at this age. This is particularly relevant from a training delivery perspective considering that the target audience age is tending to lie between the ages of 16 and 31. This is firmly in line with the course admission criteria reported by TSPs earlier and has implications upon course content and complexity, course teaching methodologies and upon the student's own or his employer's capacity to pay for the training.

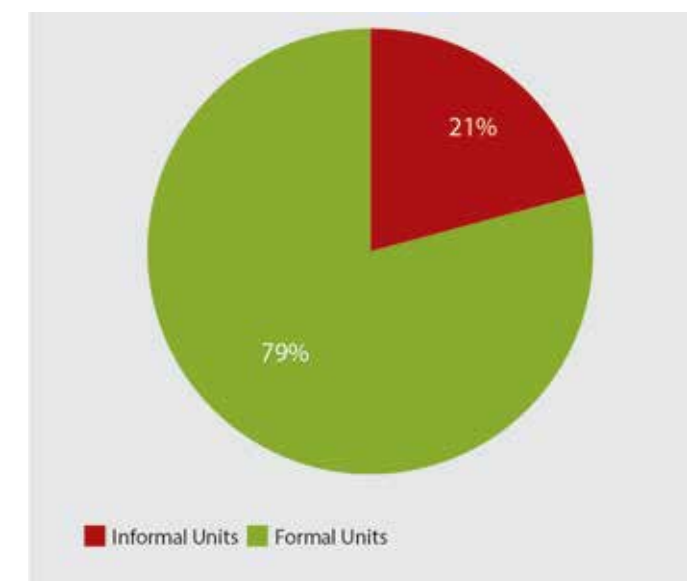


FIGURE 20: NUMBER OF EMPLOYEES

| Age Group          | Overall | Formal | Informal |
|--------------------|---------|--------|----------|
| Less than 15 Years | 82      | 21     | 61       |
| 16 20 Years        | 1146    | 927    | 219      |
| 21 30 Years        | 3521    | 2834   | 687      |
| 31 40 Years        | 2456    | 1898   | 558      |
| 41 50 Years        | 901     | 748    | 153      |
| 51 60 Years        | 82      | 65     | 17       |

TABLE 27: AGE PROFILE

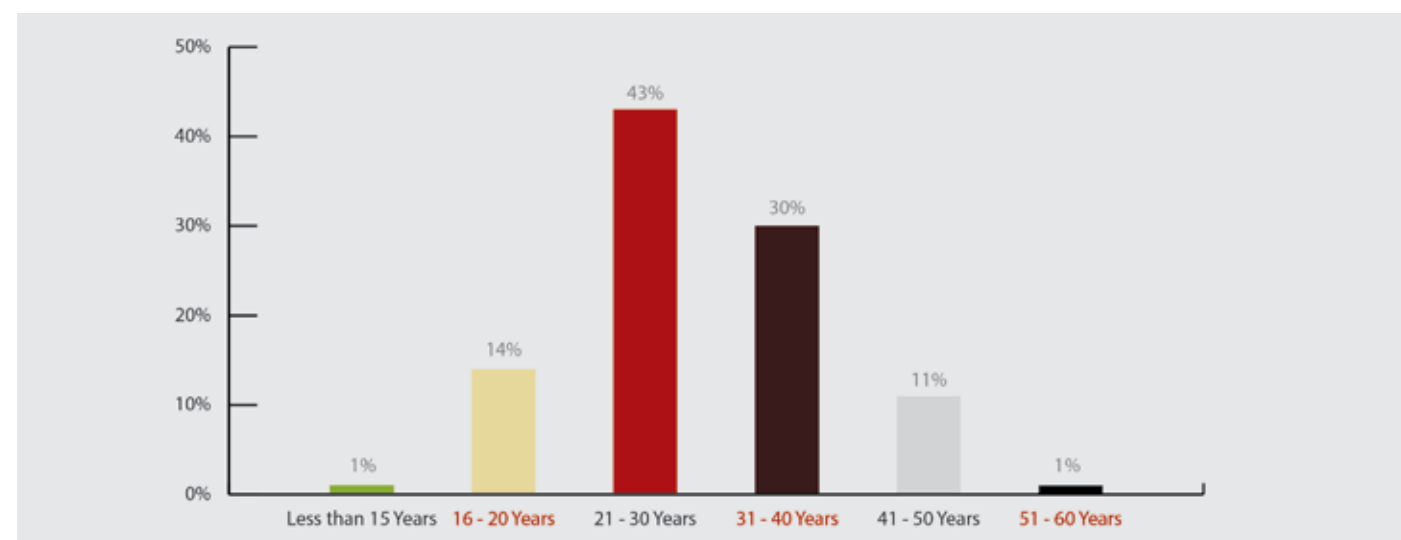


FIGURE 21: AGE GROUP

## GENDER PROFILE

**4.2.4** It is clear from quantitative survey results (Table 28) that the footwear sector predominantly employs males regardless of formal or informal establishments. A comparatively greater share of female employees can be seen in the formal establishments but not exceeding 20% of the total workforce.

| GENDER | Overall Results | Nature of Establishments |     |          |     |
|--------|-----------------|--------------------------|-----|----------|-----|
|        | Total           | Formal                   |     | Informal |     |
|        | No              | No                       | %   | No       | %   |
| Male   | 6,632           | 5,259                    | 81% | 1,610    | 95% |
| Female | 1,556           | 1,234                    | 19% | 85       | 5%  |

TABLE 28: GENDER PROFILE

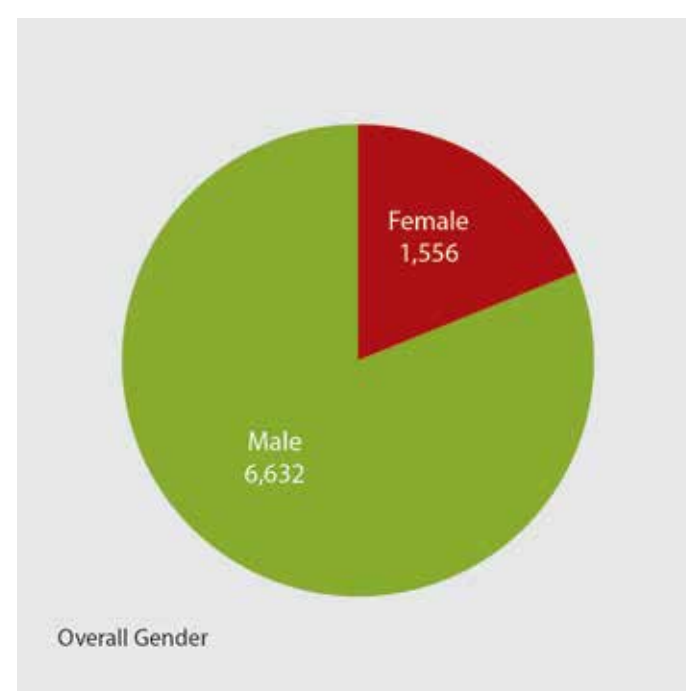
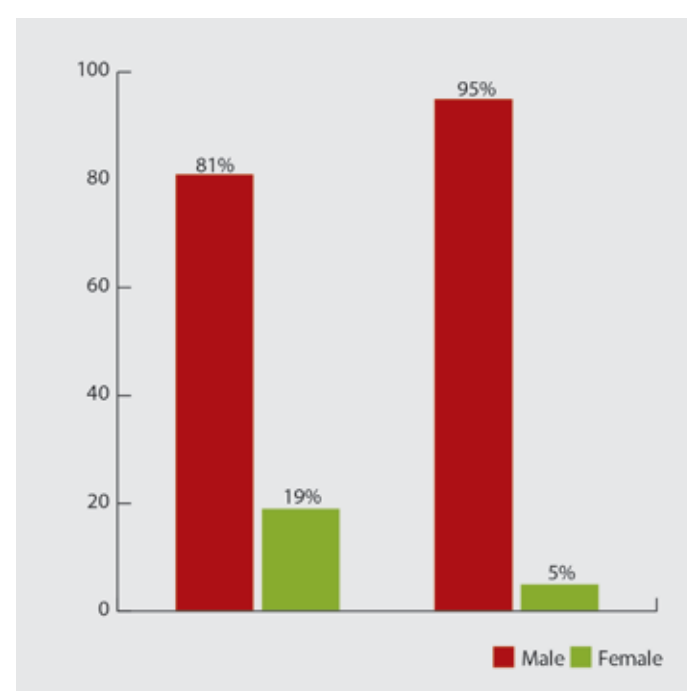


TABLE 29: GENDER SUMMARY



## BIFURCATION OF EMPLOYEES WITH RESPECT TO DESIGNATIONS

| Designation                | Nature of Establishments |        |                |          |                |
|----------------------------|--------------------------|--------|----------------|----------|----------------|
|                            | Overall                  | Formal |                | Informal |                |
|                            | No                       | No     | % contribution | No       | % contribution |
| Other Skilled Workers      | 2,275                    | 1,638  | 72%            | 637      | 28%            |
| Unskilled Workers          | 1,395                    | 1,242  | 89%            | 153      | 11%            |
| Patterns Makers/ Designers | 1,265                    | 935    | 74%            | 330      | 26%            |
| Quality Assurance Manager  | 990                      | 895    | 90%            | 95       | 10%            |
| Technicians                | 637                      | 557    | 87%            | 80       | 13%            |
| Supervisors                | 630                      | 530    | 84%            | 100      | 16%            |
| Line In charge             | 480                      | 380    | 79%            | 100      | 21%            |
| Production Man-ager        |                          |        |                |          |                |
| Procurement Manager        | 160                      | 60     | 38%            | 100      | 63%            |

TABLE 30: BIFURCATION OF EMPLOYEES WITH RESPECT TO DESIGNATIONS

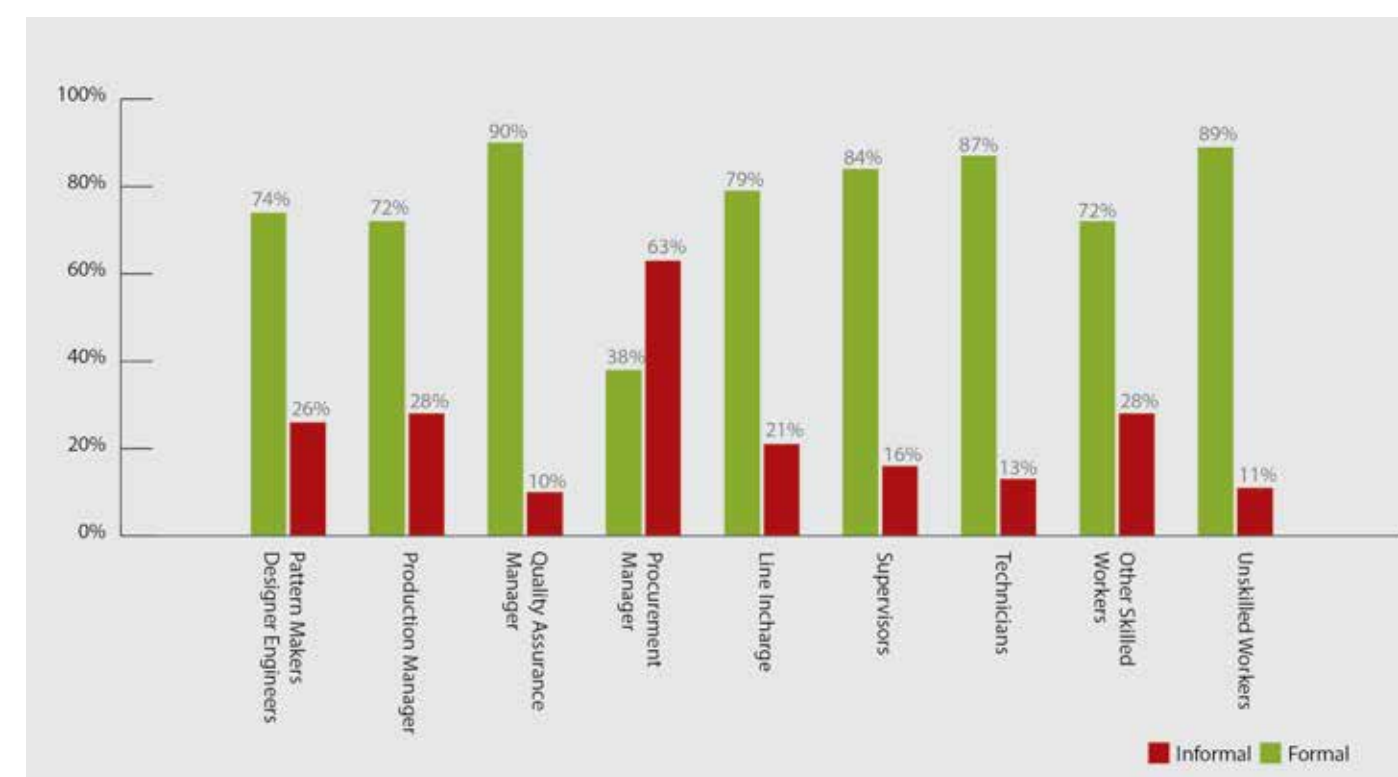


FIGURE 22: DESIGNATIONS' BIFURCATION

**4.2.5** It is evidenced above that majority of the workforce (apart from the other skilled workers and unskilled workers) of the industry work in pattern making/design engineering department especially in the formal sector. Out of the total pattern makers, 74% work in formal units and only 26% work in the informal units. Furthermore it can be seen that a proper organizational hierarchy or a scheme of designations are not very common within the informal sector establishments except for the position of 'procurement manager' which is surprisingly higher (63%)

in the informal sector. This may be due to the fact that most of the informal sector establishments are likely to be sole proprietorships where the owner tends to concentrate other managerial functions unto him.

**4.2.6** 87% and 72% of technicians and other skilled workers (from total technicians and other skilled workforce) are employed in the formal sector. It has been discussed in the section on respondent profile that majority of the formal organizations exist in Central Punjab. This



cross sectional analysis can lead to the recommendation that training courses, relevant to fulfill the technical demands of formal establishments, should be launched in the regions of Central Punjab as opposed to other regions. Subsequently, these courses can be rolled out to other parts of the province to meet demand and to fuel expansion of this sector, as and when required.

**4.2.7** A further gender-wise split with respect to designations in formal and informal sector is depicted below. It can be seen that majority of males and females are working as pattern makers in both formal and informal sectors, followed by quality assurance managers and supervisors. It can also be seen that women are working in almost all the departments of footwear industry.

| Designation                       | Overall |        | Formal |        | Informal |        |
|-----------------------------------|---------|--------|--------|--------|----------|--------|
|                                   | Male    | Female | Male   | Female | Male     | Female |
| Other Skilled Workers             | 1,853   | 422    | 1,273  | 365    | 580      | 57     |
| Unskilled Workers                 | 1,130   | 265    | 1,000  | 242    | 130      | 23     |
| Patterns Makers/ Design Engineers | 1,015   | 250    | 730    | 205    | 285      | 45     |
| Quality Assurance Manager         | 792     | 198    | 702    | 193    | 90       | 5      |
| Supervisors                       | 520     | 110    | 425    | 105    | 95       | 5      |
| Technicians                       | 506     | 131    | 430    | 127    | 76       | 4      |
| Line In charge                    | 379     | 101    | 284    | 96     | 95       | 5      |
| Production Manager <sup>30</sup>  | 298     | 58     | 202    | 54     | 96       | 4      |
| Procurement Manager               | 139     | 21     | 44     | 16     | 95       | 5      |

TABLE 31: GENDER BASED BIFURCATION OF EMPLOYEES WITH RESPECT TO DESIGNATIONS/ROLES

OVERALL QUALIFICATIONS PROFILE

**4.2.8** It is reported that 29% of the workforce employed in this sector is illiterate. As depicted in table below, the majority of employees (45%) fall under ‘Matric’ and ‘Middle School Level qualification. Their percentage is higher in the informal sector as compared to the formal sector, which is to be expected considering that the informal sector is the highest employer, amongst this survey’s respondents. Surprisingly only 11% employees have above intermediate level qualifications. Only 2% are diploma holders in footwear related trades.

| Degree  | No    | %    |
|---|-------|------|
| Professional/MBA/Post graduates                 | 263   | 3%   |
| Graduates                                       | 462   | 6%   |
| Diploma Holder/Diploma of Associate Engineering | 174   | 2%   |
| Intermediate                                    | 888   | 11%  |
| Matric  | 2,337 | 29%  |
| Middle  | 1,282 | 16%  |
| Primary   | 281   | 3%   |
| Less than Primary                               | 78    | 1%   |
| Some Education/Religious Education/Others       | 43    | 1%   |
| Illiterate                                      | 2,380 | 29%  |
| Total   | 8,188 | 100% |

TABLE 32: QUALIFICATIONS

<sup>30</sup> UNDER THE CATEGORY OF PRODUCTION MANAGER RESPONDENTS ALSO POINTED OUT SIMILAR POSITIONS E.G. PRODUCTION ASSISTANTS, MANUFACTURING HEAD AND PRODUCTION PLANNING AND CONTROL ETC., THESE RESPONSES WERE ADDED AND THE CUMULATIVE SUM (58) WAS INCLUDED IN THIS CATEGORY WHICH IS SHOWN IN THE TABLE.

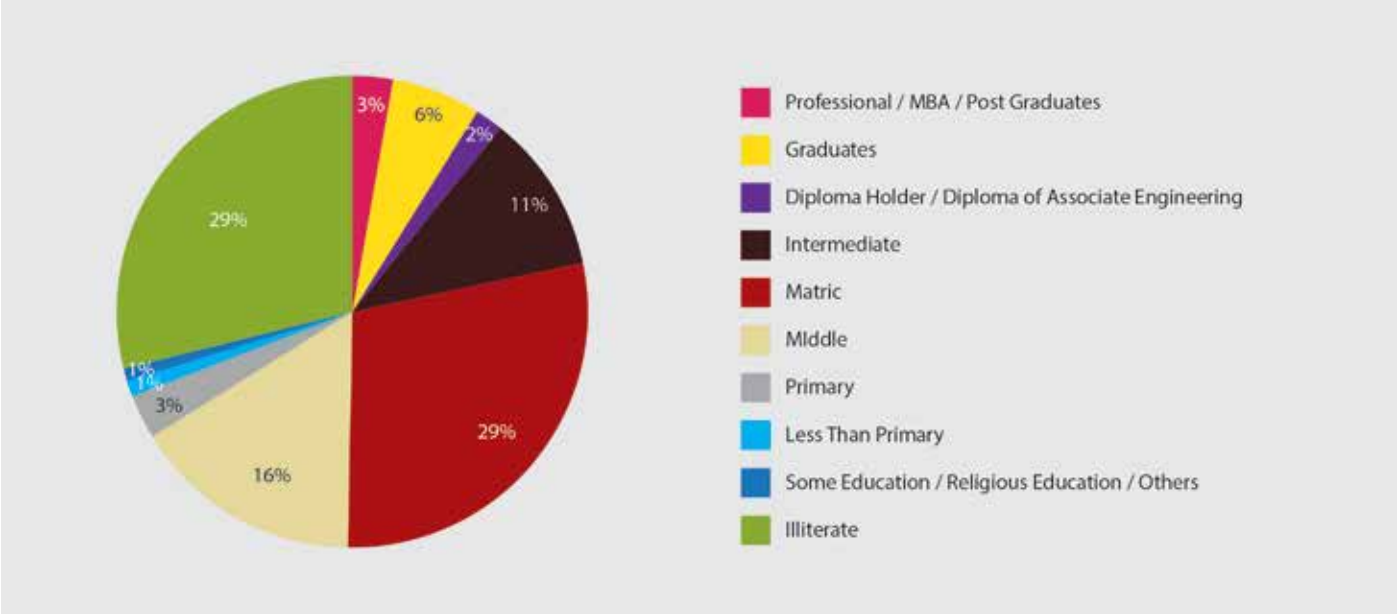


FIGURE 23: QUALIFICATIONS

**4.2.9** Given that 74% of the total workforce employed in this sector is either illiterate, or has either completed middle level reading at school or reached Matric, the implications for skill enhancement are grave. The challenge here is to raise the average skill level of the workers to correspond to more modern and skill intensive manufacturing techniques using better technologies. This is difficult to achieve considering bulk of the target student population reads at a middle school or matriculate level.

**4.2.10** A more practical and hands on learning methodology would be more suited for this section of the workforce and TSPs might just attract these students in large enough numbers to be economically feasible for them to offer such courses. Organizations in this sector can also be tapped to assist in this area to host coursework and training for students with lower education levels. An opportunity also exists for the more educated workforce to obtain diplomas in specialized areas of footwear design and manufacture.

**4.2.11** It must be qualified here that TSP’s are limited by the number of students actively seeking entry or skill enhancement for positions and careers in the footwear sector. Given the footwear sector’s current inability to market themselves to potential employees and attract a more educated candidate for induction into their organizations (see chapter on sector experts; chapter 6); a steady stream of students for higher levels of study in more value added skills learning and diploma courses might not be forthcoming. It is recommended that PSDF look into aspects of marketing at the TSP level and assist the TSPs with the long term economics of hosting such courses at their institutes.

QUALIFICATION V/S DESIGNATION GRID

**4.2.12** The table 33 below depicts the cross analysis of qualifications with designations in footwear sector. It can be seen that most professionals having above intermediate qualifications are working in technical departments

| Qualification<br>v/s Designations          | Professional | MBA/Post<br>graduates | Graduates | Diploma<br>Holder<br>/DAE | Intermediate | Matric | Middle<br>School | Primary | Less than<br>Primary | Some Education/<br>Religious Educa-<br>tion | Illiterate | Others | Total |
|--|--------------|-----------------------|-----------|---------------------------|--------------|--------|------------------|---------|----------------------|---|------------|--------|-------|
| Patterns<br>Makers<br>Designer<br>Engineer | 10           | 47                    | 182       | 76                        | 301          | 207    | 315              | 80      | 29                   | -   | -          | 18     | 1,265 |
| Production<br>Manager                      | 9            | 45                    | 91        | 32                        | 61           | 98     | 20               | -       | -                    | -   | -          | -      | 356   |
| Quality<br>Assurance<br>Manager            | 7            | 78                    | 153       | 22                        | 351          | 354    | 25               | -       | -                    | -   | -          | -      | 990   |
| Procure-<br>ment Man-<br>ager              | 6            | 57                    | 29        | 12                        | 22           | 25     | 9                | -       | -                    | -   | -          | -      | 160   |
| Line<br>Incharge                           | 3            | -                     | 4         | 15                        | 50           | 249    | 159              | -       | -                    | -   | -          | -      | 480   |
| Supervisors                                | 1            | -                     | 3         | 17                        | 55           | 400    | 154              | -       | -                    | -   | -          | -      | 630   |
| Technicians                                | -            | -                     | -         | -                         | 48           | 442    | 137              | -       | -                    | -   | -          | 10     | 637   |
| Other<br>Skilled<br>Workers                | -            | -                     | -         | -                         | -            | 600    | 145              | 146     | 49                   | 4   | 1,331      | -      | 2,275 |
| Unskilled<br>Workers                       | -            | -                     | -         | -                         | -            | 62     | 218              | 55      | -                    | -   | 1,049      | 11     | 1,395 |

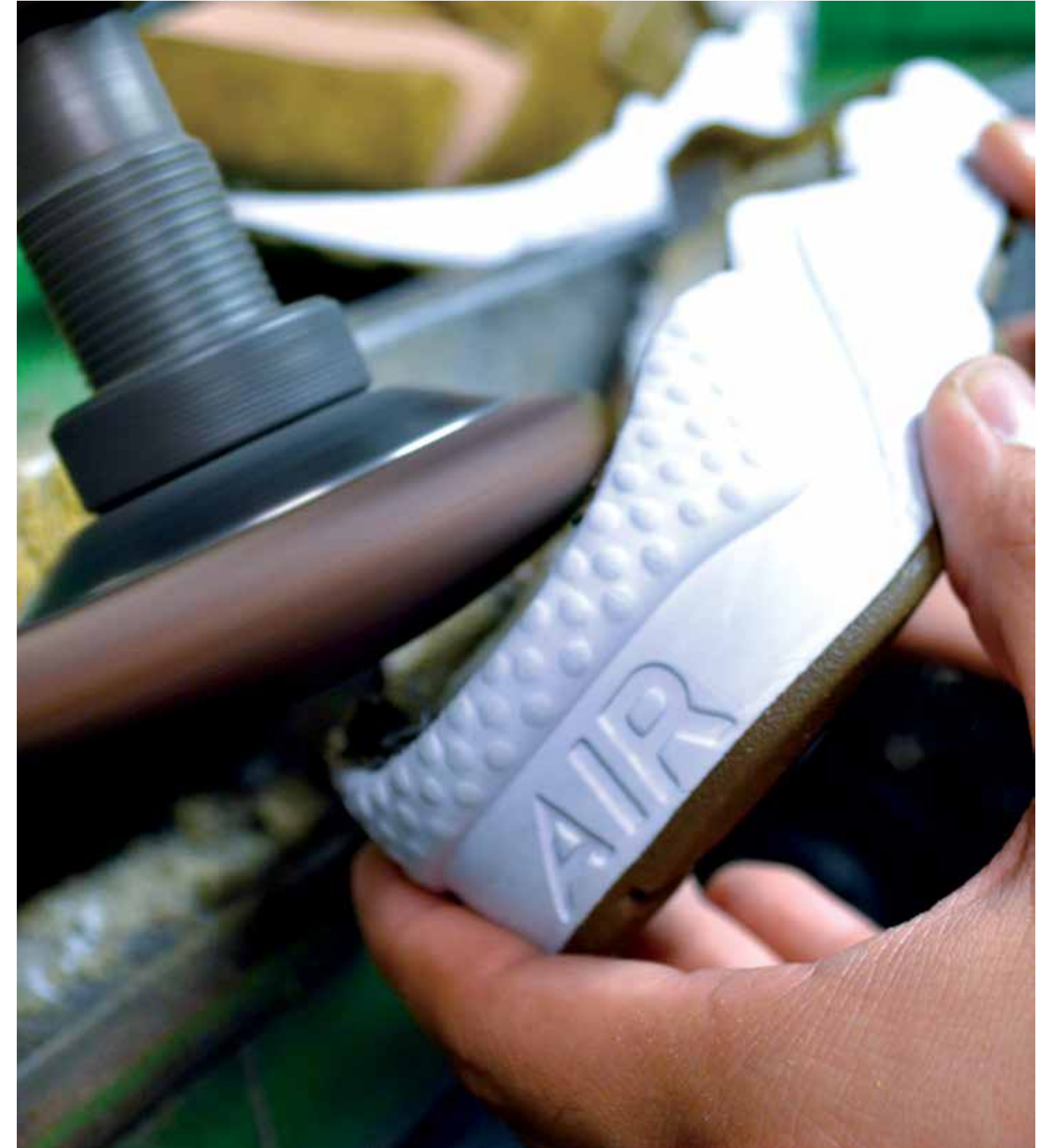
TABLE 33: QUALIFICATIONS V/S DESIGNATION

### TYPES OF ON THE JOB TRAININGS (OJTs) PROVIDED

**4.2.13** 25% (37 respondents) of the respondents were able to provide information on the OJTs provided to the employees and measures taken in past two years to enhance skill levels of employees. Out of these units who provided OJTs 23 were from the formal sector and 14 from the informal sector. The state of on the job training provision or the emphasis given to it by our respondents is grim.

**4.2.14** The formal sector is providing more on the job trainings owing to the fact that they have more resources to dedicate towards providing on the job trainings to their employees. Further the management of these companies is more aware of the necessity to inculcate skills in their workforce to be able to compete internationally.

**4.2.15** The table 34 below depict the types of OJTs provided by the footwear companies for each designation along with percentage of respondents (companies) who provided these OJTs to enhance skill levels of new and existing employees;





| Types of OJTs Provided                   | % of Respondents Providing OJT |
|--|--------------------------------|
| <b>Patterns Makers/ Design Engineers</b> |                                |
| Designing Skills                         | 13%                            |
| Pattern Making                           | 7%                             |
| <b>Production Manager</b>                |                                |
| Buffing Machine Operating Skills         | 1%                             |
| Embossing Machine                        | 3%                             |
| Leather Processing Machine               | 2%                             |
| Machine Operating Skills <sup>31</sup>   | 11%                            |
| Stitching Machine                        | 4%                             |
| <b>Quality Assurance Manager</b>         |                                |
| Machinery Productivity QC                | 8%                             |
| Product Evaluation QC                    | 7%                             |
| Quality Control Production Process       | 6%                             |
| <b>Procurement Manager</b>               |                                |
| Aptitude for technology                  | 5%                             |
| Negotiation skills                       | 7%                             |
| Purchasing of Quality Raw Material       | 10%                            |
| <b>Line In charge</b>                    |                                |
| Business Communication Skills            | 10%                            |
| Complexity and Uncertainty               | 5%                             |
| Machinery Styles                         | 1%                             |
| Professional Development Programs        | 4%                             |
| <b>Supervisors</b>                       |                                |
| Communication Skills                     | 10%                            |
| Diversity Skills                         | 1%                             |
| Situational Leadership Skills            | 11%                            |
| <b>Technicians</b>                       |                                |
| Air blowing Machine                      | 11%                            |
| Plastic Molding Machine                  | 7%                             |
| Sewing Machine Skills                    | 4%                             |
| <b>Other Skilled Workers</b>             |                                |
| Communication Skills                     | 14%                            |
| Machine Operating Skills                 | 5%                             |
| Work Ethics                              | 3%                             |
| <b>Unskilled Workers</b>                 |                                |
| Situational Leadership Skills            | 14%                            |
| Work Ethics                              | 8%                             |
| <b>TABLE 34: TYPES OF OJTs</b>           |                                |

#### 4.3 OFF THE JOB TRAININGS

##### OFF SITE TRAINING:

**4.3.1** It emerged that only 19% of the organizations relieved workers for offsite training. Out of the 47 formal compa-nies 23% relieved workers for offsite training and out of 100 informal companies only 17 relieved workers for the same. The majority of the respondents who send their employees offsite, tended to relieve their employees for a day course. Details are given in the table ahead:

<sup>31</sup> **MACHINE OPERATING SKILLS** INVOLVE; PLANNING AND EXECUTING SPECIFIC RUNS AND SETTING UP MACHINES ACCORDINGLY, MONITORING WORKFLOW TO ASSURE QUALITY AND INSTALLING AND MAINTAINING RECORDS OF EQUIPMENT USAGE, REPAIR HISTORY, RELIABILITY, ETC.

| Relieve Workers For Training Off Site             | % Of Responses Formal Sector | % Of Responses Informal Sector | Duration      | Number of Responses |
|---|------------------------------|--------------------------------|---------------|---------------------|
| Yes (19%)   | 23%                          | 17%                            | Day Course(S) | 22                  |
|   |                              |                                | 1 Week        | 08                  |
|   |                              |                                | 2-4 Weeks     | 05                  |
|   |                              |                                | 2-6 Months    | 03                  |
| TABLE 35: RELIEVING WORKERS FOR TRAINING OFF SITE |                              |                                |               |                     |

**4.3.2** The table above (Table 35) shows that the majority of the respondent organizations are not actively providing off the job trainings to their employees. This can be attributed to production demands, lack of management interest etc. Far more pertinent to our purposes is the finding that respondents themselves do not know where to send their workers for training. This was attributed to the low number of training institutions offering courses in which these orga-nizations would be interested in offering nominations, poor marketing on the part of the TSPs and training institutions being unable to cater to the growing needs for highly technical trainings.

**4.3.3** Another impacting factor is that the management of most organizations is dissatisfied with the quality of the training programs being conducted. Firms also reported being unable to send their employees to these institutions because the TSPs are located far off from the major industrial hubs, as a result the commute and accommodation arrangements becomes an added cost.

**4.3.4** In the informal sector, it is management mindset more than anything else that stands in the way of provisioning of offsite training to employees<sup>32</sup>. A glance at the table 36 indicates a long list of opinions about discipline, performance and fears of losing workforce to better prospects post-training. This mindset may be grounded in past experience but its existence represents another potential hurdle that TSPs themselves need to overcome before they can attract stu-dents.

**4.3.5** Apart from above the below table depicts the main survey findings/reasons for not willing to relieve workers for training outside factory. Majority of the respondents (17%) do not send their employees for offsite trainings as they believe that these trainings provide networking opportunities to their employees (which were used by employees for switching jobs). This has also been derived through in depth interviews of sector experts (IDIs with Simba Shoes, EBH and S.S. Footwear)

| Reasons for Not Relieving Workers for Offsite Training   | %   |
|--|-----|
| Get engaged in networking activities and switch jobs   | 17% |
| Trained staff are poached by other employers   | 5%  |
| Fail to accommodate expectations of trained employees/demand high salary/lose interest in work         | 5%  |
| Reluctant to make big investments in employees who might not stay long                                 | 5%  |
| Training courses offered are ineffective   | 3%  |
| Training courses requires are not administered locally.  | 3%  |
| Lack of good local training providers  | 5%  |
| Difficult to get information about the courses available locally                                       | 2%  |
| Inconvenient course schedule   |     |
| Better in-house training opportunities   | 5%  |
| Better on-the-job training opportunities   | 3%  |
| Arrange customized courses at own premises   | 2%  |
| Employees are too busy to undertake training/Loss of work  | 23% |
| Managers lack time to organize training/Hard to find the time to organize training                     | 3%  |
| Training is not considered to be a priority for the establishment                                      | 2%  |
| Increase workload for other staff/Can't spare more staff time (having them away on training)           | 13% |
| Lack of funds for training / training expensive/ No money available for training/Financial constraints | 2%  |
| Increased Operating Costs  | 2%  |
| <b>TABLE 36: REASONS FOR NOT RELIEVING WORKERS FOR OFFSITE TRAINING</b>                                |     |

<sup>32</sup> IN-DEPTH INTERVIEWS WITH SECTOR EXPERTS FROM PFMA, BATA AND ELEGANT SHOES

CO-FINANCING THE TRAININGS FOR EMPLOYEES

4.3.6 Only 11% (17 units) of the organizations indicated that they were willing to co-finance the trainings of existing workers. Out of these, 8 formal units are willing to finance the training of their workers and out of these 8 organizations, 4 units are only willing to finance 20%-30% of the training program costs and another 4 units are willing to invest more than 50%. In the informal sector, only 8 units out of 100 were willing to co-finance. Of these 4 are willing to finance 20%-30% and another 3 are willing to finance 50%-100% of training.

| Co Finance the training of existing workers | Formal | Informal |
|---|--------|----------|
| Yes -17 establishments                      | 9      | 8        |
| % Of Financing                              | Formal | Informal |
| 20% -30%                                    | 5      | 3        |
| 50%-100%                                    | 4      | 3        |

TABLE 37: CO-FINANCING THE TRAINING OF EXISTING WORKERS

4.4 TECHNOLOGY

4.4.1 Table below depicts the list of machines that are being used in the shoe making processes informal and informal sectors, along with jobs performed on these machines and the skills required. The table also depicts the number of footwear units where these machineries are currently in use.

4.4.2 According to survey results the most widely used machine in both formal and informal factories is the stitching machine (40%). Stitching machines are installed in 30 formal and 29 informal units. After stitching the most widely used machines are cutting (16%) and buffing machines (16%) respectively, in formal and informal factories. Cutting machines are installed in 20 formal and 4 informal units whereas Buffing machines are installed in 9 formal and 15 informal units. These machines are single function (buffing and cutting). Majority of the cutting and buffing machines are semi-automatic and fully automatic in the formal sector while the informal sector uses manual machines for the same processes. Survey results indicate that Lasting Machines were found only in 14 formal units are reported operating this machine. The other respondents perform this step of the process by hand.

LEVEL OF AUTOMATION IN FOOTWEAR SUB-SECTORS:

4.4.3 This section will give an overview of how each process (e.g. cutting, designing/pattern making, edging, sewing etc.) in several footwear sub-sectors is performed. These sub-divisions/sub sections (with respect to base materials) are as follows:

- Pure Leather manufacturing
- Patent Leather manufacturing

- Textile Canvas manufacturing
- Rubber manufacturing
- Plastics manufacturing
- Others manufacturing (e.g. nylon, synthetics, other than plastic polymers etc.)



| Machines  | Jobs Performed        | Skills Required  | Formal |    | Informal |    | Total |    |
|---|-----------------------|--|--------|----|----------|----|-------|----|
|   |                       |  | Units  | %  | Units    | %  | Units | %  |
| Cutting Machine   | Cutting               | Cutting Skills   | 20     | 43 | 4        | 4  | 24    | 16 |
| Stitching Machine   | Stitching/Sewing      | Stitching Machine operating Skills/Sewing Machine Operating/Upper manufacturing skills | 30     | 64 | 38       | 38 | 58    | 46 |
| Grinding Machine  | Grinding              | Grinding Machine Operating Skills required   | 3      | 6  | 9        | 9  | 12    | 8  |
| Buffing Machine   | Buffing               | Buffing Machine Operating Skills required  | 9      | 19 | 15       | 15 | 24    | 16 |
| Pressing Machine  | Pressing              | At least 2-3 years of Experience/Press machine Operating skills are required           | 6      | 13 | 1        | 1  | 7     | 5  |
| Lasting Machine   | Lasting               | Lasting Machine Operator required  | 14     | 30 | -        | -  | 14    | 10 |
| Pasting/Press Machine   | Pasting               | Pasting Press Machine Operating Skills required  | -      | -  | 1        | 1  | 1     | 1  |
| Finishing Machine   | Finishing             | Finishing Machine Operating Skills required  | -      | -  | 3        | 3  | 3     | 2  |
| Leather Cutting Machine   | Leather Cutting       | Leather Cutting Machine Operating Skills required                                      | 1      | 2  | -        | -  | 1     | 1  |
| Molding Machine   | Molding               | Molding Machine Operating Skills required  | 3      | 6  | -        | -  | 3     | 2  |
| Sole Making Machine   | Sole making           | Sole Machine Operating Skills required   | 6      | 13 | 1        | 1  | 7     | 5  |
| Folding Machine   | Folding               | Folding Machine Operating Skills required  | 1      | 2  | -        | -  | 1     | 1  |
| Embossing Machine   | Embossing             | Embossing Machine Operating Skills required  | 3      | 6  | -        | -  | 3     | 2  |
| Footwear Raw Material Making Machines   | Raw Materials         | Raw Material Making Machines Operating Skills required                                 | 1      | 2  | -        | -  | 1     | 1  |
| Filling Machine   | Filling               | Filling Machine Operating Skills required  | 3      | 6  | 6        | 6  | 9     | 6  |
| Trimming Machine  | Trimming              | Trimming Machine Operating Skills required   | 2      | 4  | -        | -  | 2     | 1  |
| Installing Machine  | Installing            | Installing Machine Operating Skills required   | 1      | 2  | -        | -  | 1     | 1  |
| Shining Machine   | Shining               | Shining Machine Operating Skills required  | 4      | 9  | 5        | 5  | 9     | 6  |
| Handling Tools Machine  | Handling Tools        | Handling Tools Machine Operating Skills required                                       | 1      | 2  | -        | -  | 1     | 1  |
| Air Blowing Machine   | Air Blowing           | Air Blowing Machine Operating Skills required  | 1      | 2  | -        | -  | 1     | 1  |
| Poly Urethrene Machine  | Stitching             | PU Machine Operating Skills required   | 9      | 19 | -        | -  | 9     | 6  |
| Synthetic/Plastic Upper Manufacturing Machines  | Plastic Manufacturing | Synthetic/Plastic Machine Operating Skills required                                    | 2      | 4  | -        | -  | 2     | 1  |
| Cleaning Machine  | Cleaning              | Cleaning Machine Operating Skills required   | 3      | 6  | -        | -  | 3     | 2  |
| Operating skills - pertain to the knowledge and abilities needed to accomplish tasks and activities on machines that are used to manufacture footwear article |                       |  |        |    |          |    |       |    |

TABLE 38: MACHINES



| PURE LEATHER              |                 |                  |                   |              | PATENT LEATHER   |        |                 |                  |                   | TEXTILE CANVAS |                  |        |                 |                  | RUBBER            |              |                  |        |                 | PLASTIC          |                   |              |                  |        | OTHERS          |                  |                   |              |                  |        |   |
|---------------------------|-----------------|------------------|-------------------|--------------|------------------|--------|-----------------|------------------|-------------------|----------------|------------------|--------|-----------------|------------------|-------------------|--------------|------------------|--------|-----------------|------------------|-------------------|--------------|------------------|--------|-----------------|------------------|-------------------|--------------|------------------|--------|---|
| Production process        | Fully Automated | Semi - Automated | Manual-by machine | hand / tools | machine and Hand | Others | Fully Automated | Semi - Automated | Manual-by machine | hand / tools   | machine and Hand | Others | Fully Automated | Semi - Automated | Manual-by machine | hand / tools | machine and Hand | Others | Fully Automated | Semi - Automated | Manual-by machine | hand / tools | machine and Hand | Others | Fully Automated | Semi - Automated | Manual-by machine | hand / tools | machine and Hand | Others |   |
| Designing/ Pattern making | 1               | 9                | 1                 | 31           | 5                | 1      | 1               | 1                | 6                 | 1              | 22               | 2      | -               | 1                | 3                 | 1            | 3                | 1      | -               | 3                | 1                 | 5            | 1                | -      | 1               | -                | 1                 | -            | 10               | -      | - |
| Cutting/ Clicking         | 1               | 7                | 5                 | 27           | 12               | -      | 1               | 7                | 3                 | 21             | 1                | -      | -               | 2                | 1                 | 3            | 1                | 10     | -               | 3                | 2                 | 5            | 1                | -      | 1               | -                | 1                 | -            | 11               | 3      | - |
| Edging                    | 1               | 3                | 9                 | 27           | 6                | -      | -               | 3                | 5                 | 18             | 2                | -      | -               | 1                | 3                 | 3            | 1                | 1      | -               | 2                | 2                 | 3            | 1                | -      | 1               | -                | 1                 | 1            | 11               | 2      | - |
| Hand Sewing               | 2               | 3                | 14                | 16           | 13               | -      | 1               | 6                | 5                 | 12             | 11               | -      | -               | 1                | 1                 | 1            | 2                | 1      | -               | 3                | 1                 | 4            | 3                | -      | -               | -                | 3                 | 9            | 3                | -      | - |
| Pasting                   | 1               | 5                | 3                 | 24           | 7                | -      | 1               | 3                | 3                 | 22             | 3                | -      | -               | 3                | 1                 | 3            | 1                | 10     | -               | 1                | 3                 | 1            | 4                | 1      | -               | -                | 1                 | 10           | 1                | -      | - |
| Trimming                  | 1               | 3                | 3                 | 17           | 6                | -      | 1               | 4                | 3                 | 24             | 1                | -      | -               | 1                | 1                 | 1            | 3                | 1      | -               | 2                | 1                 | 4            | 1                | -      | -               | -                | -                 | 8            | 1                | -      | - |
| Lasting                   | 1               | 4                | 3                 | 18           | 5                | -      | 2               | 3                | 2                 | 21             | 1                | -      | -               | 1                | 1                 | 1            | 4                | 1      | -               | 2                | 1                 | 5            | 2                | -      | -               | -                | -                 | 7            | 1                | -      | - |
| Pressing                  | 2               | 3                | 3                 | 14           | 8                | -      | 2               | 3                | 2                 | 18             | 1                | -      | -               | 1                | 1                 | 1            | 2                | 1      | -               | 2                | 1                 | 4            | 1                | -      | -               | -                | 1                 | 5            | 1                | -      | - |
| Molding                   | 4               | 3                | 3                 | 11           | 3                | -      | 2               | 5                | 2                 | 9              | 2                | -      | -               | 1                | 1                 | 1            | 2                | 1      | -               | 1                | 2                 | 3            | 1                | -      | -               | -                | -                 | 3            | -                | -      | - |
| Embellishing              | 2               | 1                | 1                 | 9            | 1                | -      | 1               | 1                | 1                 | 10             | -                | -      | -               | -                | 1                 | 1            | 3                | 1      | -               | 1                | 1                 | 1            | -                | -      | -               | -                | 2                 | 1            | -                | -      | - |
| Embroidery                | 1               | 2                | 1                 | 9            | 1                | -      | -               | 1                | 1                 | 10             | 2                | -      | -               | -                | 1                 | 3            | 1                | 1      | -               | -                | -                 | 1            | 1                | -      | -               | -                | -                 | 1            | -                | -      | - |
| Buffing                   | 1               | 3                | 2                 | 12           | 3                | -      | -               | 3                | 1                 | 12             | 9                | -      | -               | 1                | 2                 | 2            | 7                | 1      | -               | 1                | 3                 | 3            | 1                | -      | -               | -                | -                 | 3            | -                | -      | - |
| Polishing                 | 1               | 2                | 4                 | 15           | 5                | -      | -               | 3                | 3                 | 20             | 3                | -      | -               | 1                | 1                 | 3            | 7                | 1      | -               | 2                | 2                 | 3            | -                | -      | -               | -                | -                 | 5            | -                | -      | - |
| Labeling                  | 2               | 3                | 5                 | 14           | 5                | 1      | 1               | 2                | 1                 | 18             | 3                | -      | -               | 1                | 1                 | -            | 3                | 1      | -               | 1                | 1                 | 2            | 2                | -      | -               | -                | 1                 | 4            | 1                | -      | - |
| Packing                   | 1               | 2                | 2                 | 12           | 10               | -      | -               | 1                | 1                 | 12             | 4                | -      | -               | -                | 1                 | -            | 1                | 2      | -               | 1                | -                 | 1            | 3                | -      | -               | -                | 1                 | 1            | 3                | -      | - |

TABLE 39: LEVEL OF AUTOMATION (%)

TABLE 39: LEVEL OF AUTOMATION (%)

**4.4.4** The above table clearly shows that the majority of operations are being performed manually in the industry (62%) followed by ‘combination of machine and hand’ and finally semi-automatic respectively. Only the large scale companies are using fully automated machines and the overall percentage of use of fully automated technology is very low (11%). It can be assumed from this situation that while the industry has begun a shift towards automated operations and synthetic materials, the industry itself is still bound to outdated production processes and methodologies and their corresponding machineries and equipment.

#### 4.5 SKILLS ASSESSMENTS

##### SKILLS REQUIRED – UNPROMPTED<sup>33</sup>

**4.5.1** This section provides details on unprompted responses received on the ‘skills required’ as reported by

the survey respondents, both in formal and informal sector. Majority of the respondents (12% overall) are of view that pattern making is the single most important skill required in the footwear sector, followed by hand sewing (11%), cutting/pasting/lasting/trimming/finishing (10%) and footwear designing skills (10% overall).

**4.5.2** When the formal and informal units are assessed separately, it can be seen that there is a greater application of cutting, pasting, lasting, trimming, finishing and footwear designing skills in the formal sector. Whereas the most required skills in the informal sector are pattern making and hand sewing. This is logical considering that the informal sector is limited in the range of its products and production processes whereas the formal sector has shown a higher degree of production complexity.

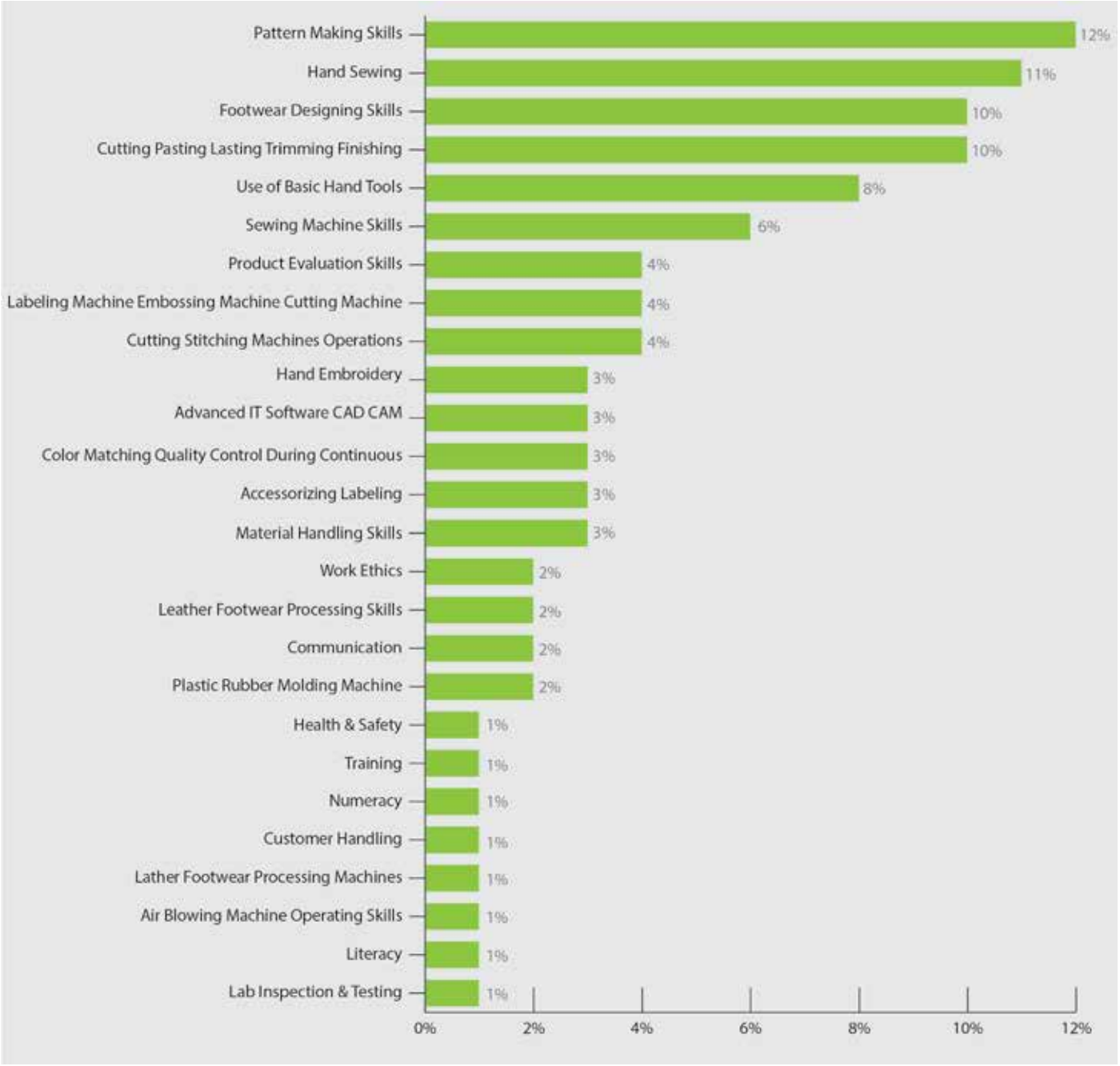


FIGURE 24: SKILLS REQUIRED-UNPROMPTED RESPONSES

<sup>33</sup> RESPONDENTS WERE ASKED TO RESPOND TO THESE QUESTIONS USING THEIR OWN KNOWLEDGE/EXPERIENCE WITHOUT ASSISTING OR SHARING ANY INFORMATION



| Unprompted Skills Assessment                                | Overall          | Formal           | Informal         |
|---|------------------|------------------|------------------|
|   | % of respondents | % of respondents | % of respondents |
| Pattern Making Skills                                       | 12%              | 6%               | 17%              |
| Hand Sewing   | 11%              | 5%               | 17%              |
| Cutting Pasting Lasting Trimming Finishing                  | 10%              | 10%              | 11%              |
| Footwear Designing Skills                                   | 10%              | 9%               | 11%              |
| Use of Basic Hand Tools                                     | 8%               | 4%               | 12%              |
| Sewing Machine Skills                                       | 6%               | 6%               | 6%               |
| Cutting Stitching Machines Operations                       | 4%               | 6%               | 2%               |
| Labeling Machine Embossing Machine Cutting Machine          | 4%               | 5%               | 3%               |
| Product Evaluation Skills                                   | 4%               | 4%               | 3%               |
| Material Handling Skills                                    | 3%               | 5%               | 2%               |
| Accessorizing Labeling                                      | 3%               | 5%               | 2%               |
| Color Matching Quality Control During Continuous Production | 3%               | 5%               | 2%               |
| Advanced IT Software CAD CAM                                | 3%               | 4%               | 1%               |
| Hand Embroidery   | 3%               | 0%               | 4%               |
| Plastic Rubber Molding Machine                              | 2%               | 4%               | 1%               |
| Communication   | 2%               | 2%               | 2%               |
| Leather Footwear Processing Skills                          | 2%               | 2%               | 2%               |
| Work Ethics   | 2%               | 4%               | 0%               |
| Lab Inspection and Testing                                  | 1%               | 2%               | 1%               |
| Literacy  | 1%               | 3%               | 0%               |
| Air Blowing Machine Operating Skills                        | 1%               | 2%               | 0%               |
| Leather Footwear Processing Machines                        | 1%               | 2%               | 0%               |
| Customer Handling   | 1%               | 2%               | 0%               |
| Numeracy  | 1%               | 1%               | 1%               |
| Training  | 1%               | 1%               | 0%               |
| Health and Safety   | 1%               | 1%               | 0%               |

TABLE 40: SKILLS REQUIRED - UNPROMPTED RESPONSE

### SKILLS REQUIRED –PROMPTED<sup>34</sup>

**4.5.3** Similarly, the results of prompted responses (both in the formal and informal sector) reveal that the most extensively required skills in the footwear sectors are again designing skills and pattern making skills (as mentioned in Figures 25& 26 below) .

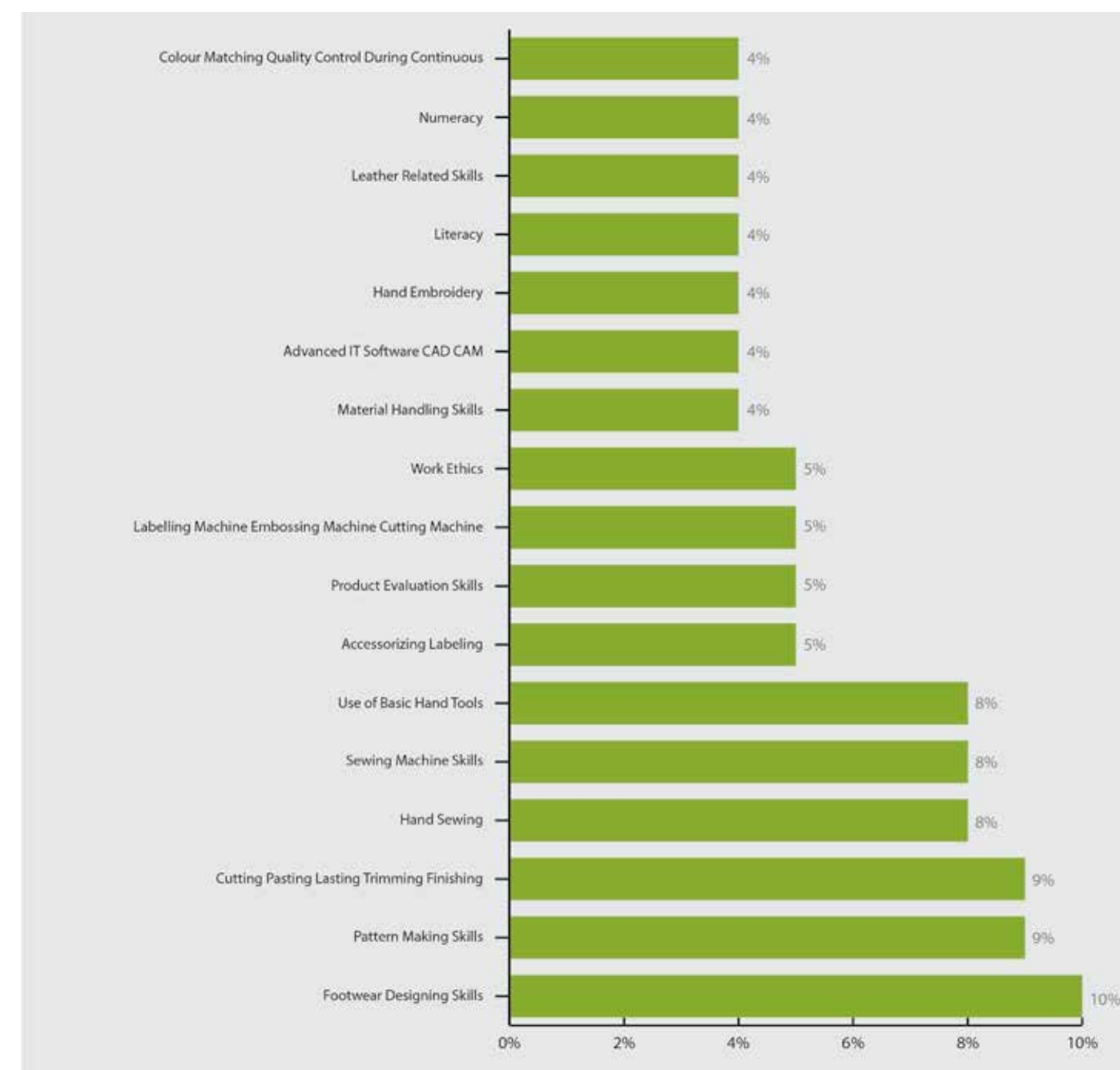


FIGURE 25: SKILLS REQUIRED- PROMPTED RESPONSE

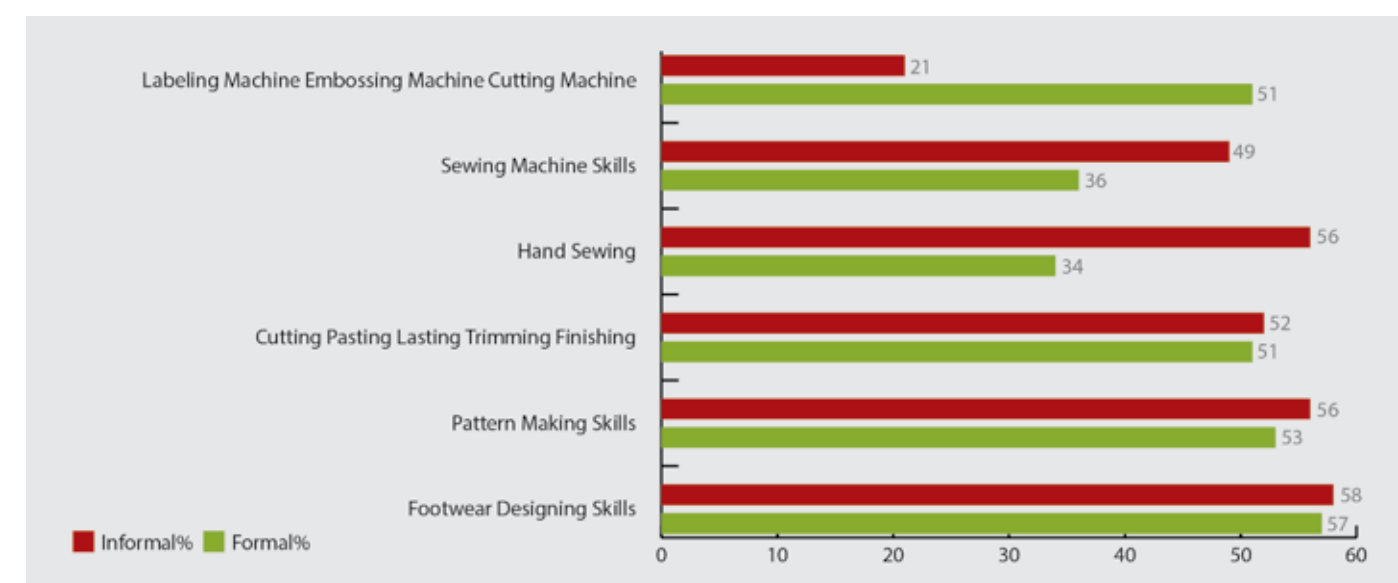


FIGURE 26: SKILLS REQUIRED- PROMPTED RESPONSE %

<sup>34</sup> RESPONDENTS WERE ASKED TO RESPOND TO THESE QUESTIONS USING OPTIONS AVAILABLE IN CARDS; WHICH WERE SHOWN TO THEM DURING CONDUCT OF SURVEY

**4.5.4** We asked the respondents to identify which skills were the most required skills by the industry and which skills they found difficulty in sourcing from the market. As depicted in figure 30 in hard to find skills section of this chapter below. Unsurprisingly, Designing Skills (20% respondents), Pattern Making Skills (15% respondents) and Advanced IT CAD/CAM skills (11% respondents), which are also the most required skills in the industry (as depicted in above section), are hard to find skills as well indicating the largest demand/supply gap. This represents an opportunity for TSPs and PSDF to step in and reinforce these skills at the onset. This is further supported by the in-depth interviews of TSPs and Sector Experts.

**4.5.5** Further the geographic breakdown of ‘skills requirement’ is depicted in below table. It can be easily seen that majority of aforementioned skills are required in Central Punjab followed by North and Southern Punjab.

| SKILLS REQUIREMENT  | North Punjab (Sample Size=25) | South Punjab (Sample Size=34) | Central Punjab (Sample Size=88) |
|---|-------------------------------|-------------------------------|---------------------------------|
|   | No                            | No                            | No                              |
| Footwear Designing Skills                                   | 18                            | 16                            | 66                              |
| Pattern Making Skills                                       | 16                            | 14                            | 65                              |
| Advanced IT Software CAD CAM                                | 7                             | 4                             | 36                              |
| Use of Basic Hand Tools                                     | 23                            | 25                            | 60                              |
| Hand Sewing   | 22                            | 26                            | 63                              |
| Hand Embroidery   | 12                            | 13                            | 40                              |
| Cutting Pasting Lasting Trimming Finishing                  | 17                            | 24                            | 67                              |
| Accessorizing Labeling                                      | 13                            | 20                            | 61                              |
| Sewing Machine Skills                                       | 10                            | 17                            | 62                              |
| Material Handling Skills                                    | 8                             | 19                            | 59                              |
| Labeling Machine Embossing Machine Cutting Machine          | 7                             | 16                            | 46                              |
| Air Blowing Machine Operating Skills                        | 2                             | 6                             | 26                              |
| Plastic Rubber Molding Machine                              | 4                             | 3                             | 30                              |
| Leather Footwear Processing Machines                        | 3                             | 7                             | 23                              |
| Lab Inspection and Testing                                  | 2                             | 4                             | 24                              |
| Cutting Stitching Machines Operations                       | 4                             | 9                             | 30                              |
| Leather Footwear Processing Skills                          | 6                             | 7                             | 24                              |
| Color Matching Quality Control During Continuous Production | 3                             | 5                             | 32                              |
| Product Evaluation Skills                                   | 3                             | 5                             | 29                              |
| Communication   | 9                             | 16                            | 45                              |
| Team Building   | 8                             | 18                            | 35                              |
| Soft skills Training  | 9                             | 14                            | 24                              |
| Problem Solving   | 9                             | 14                            | 27                              |
| Customer Handling   | 8                             | 14                            | 30                              |
| Time Management   | 9                             | 16                            | 26                              |
| Adaptability Flexibility                                    | 9                             | 15                            | 24                              |
| English Language  | 3                             | 3                             | 14                              |
| Other Languages   | 9                             | 14                            | 24                              |
| Literacy  | 8                             | 18                            | 41                              |
| Numeracy  | 9                             | 16                            | 49                              |
| Work Ethics   | 9                             | 19                            | 48                              |

TABLE 41: SKILLS REQUIREMENT

**SKILLS FOR WHICH DEMAND IS EXPECTED TO INCREASE IN NEXT FIVE YEARS**

**4.5.6** The results of the quantitative survey reveal that there will be an increased demand for Footwear designing skills, pattern making skills, Advanced CAD/CAM and soft skills like communication, work ethics and numeracy in coming years. The results (out of 147 respondents) indicate that apart from the technical level skills there will be requirement for people with excellent soft skills and experience in compliance in the coming years.

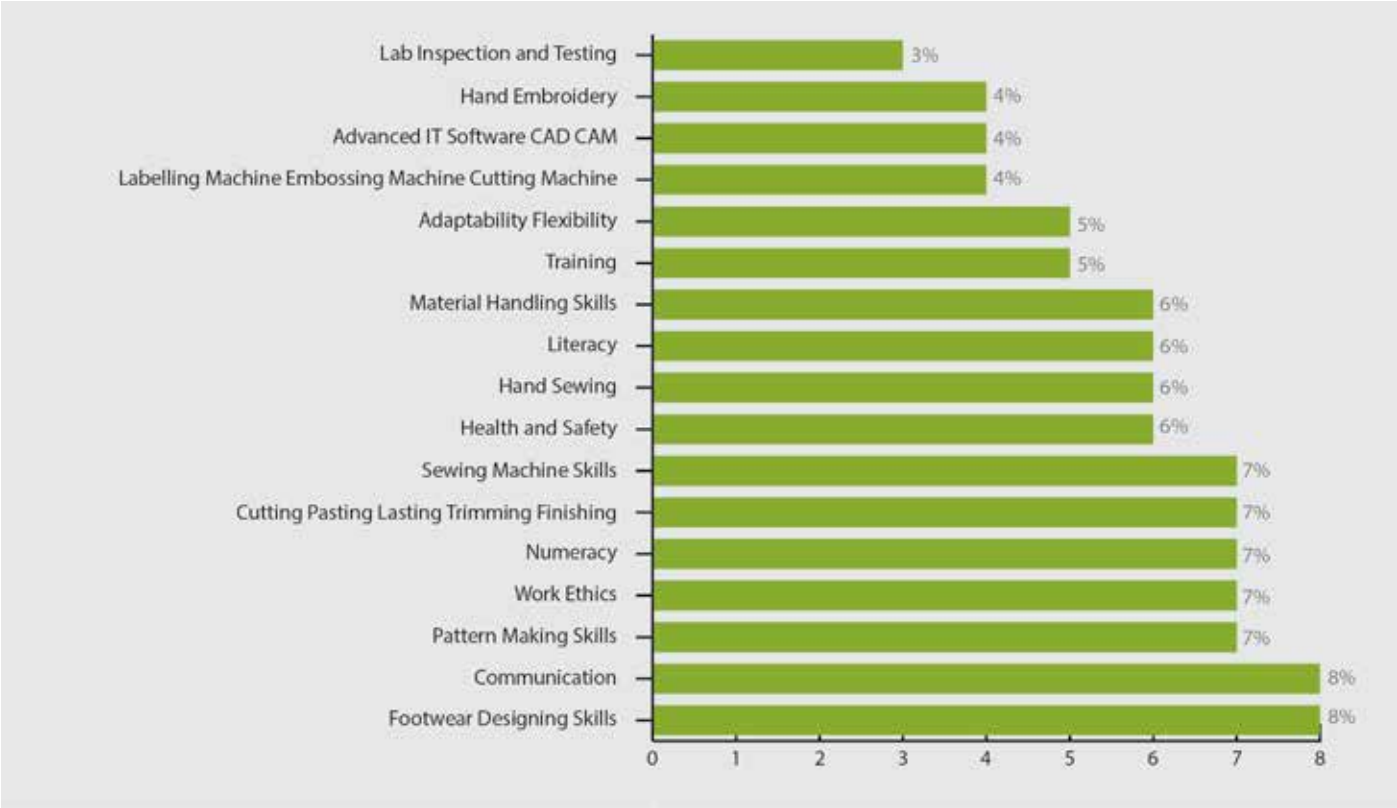


FIGURE 27: SKILLS FOR WHICH DEMAND IS EXPECTED TO INCREASE IN NEXT FIVE YEARS

**4.5.7** Further, as depicted in figure 28 below, amongst technical skills ‘footwear designing skill’ will be the most demanding skill in the next five years for both formal and informal sectors. However there will be significant demand of people with soft skills in both the sectors; which illustrates that both formal and informal sectors are realizing the significance of hiring people with exceptional soft skills (especially time management, communication, HS and compliance skills) to meet the changing dynamics of footwear business.

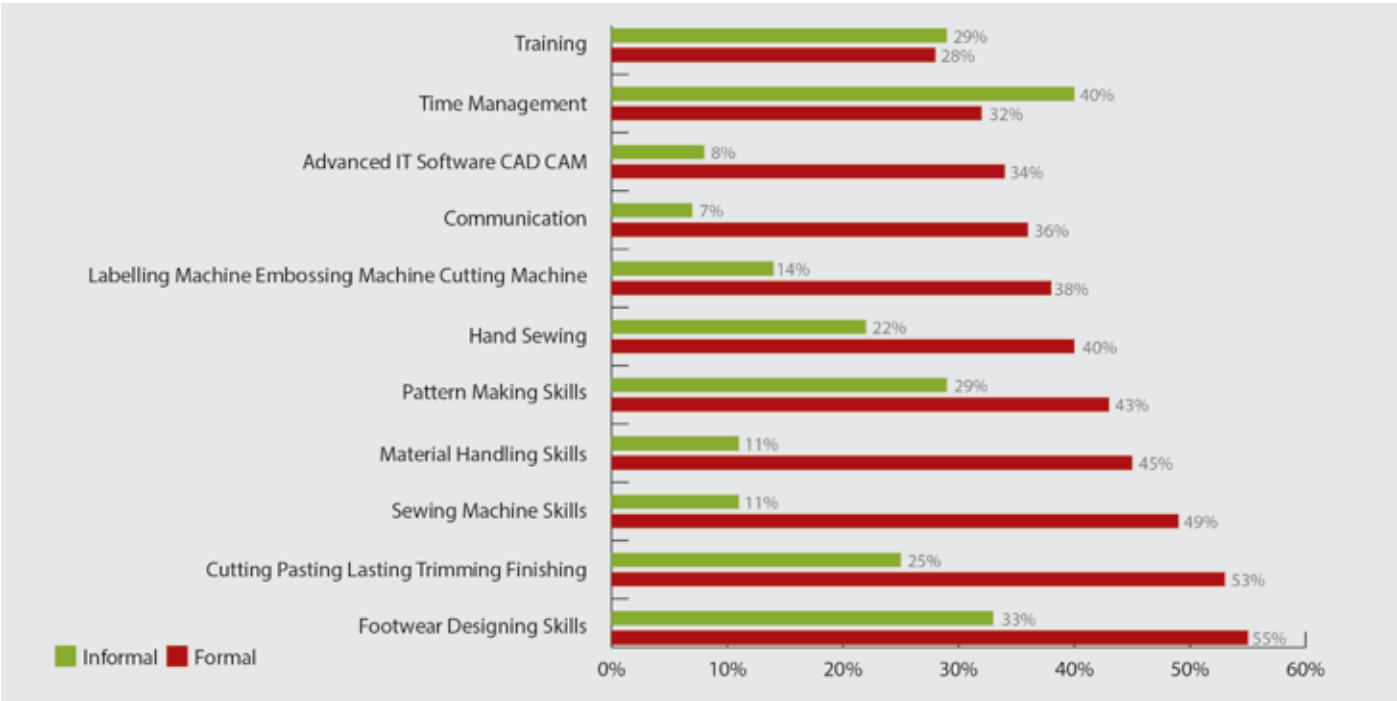


FIGURE 28: SKILLS FOR WHICH DEMAND IS EXPECTED TO INCREASE IN NEXT FIVE YEARS INFORMAL AND FORMAL RESPONDENTS



SKILLS FOR WHICH DEMAND IS EXPECTED TO DECREASE IN NEXT FIVE YEARS

4.5.8 Similarly (as depicted below) survey results indicate that in the next 5 years the demand for manual skills like the use of basic hand tools, hand sewing and hand embroidery will decrease. This is an indication which has also been derived from the in depth interviews of sector experts, that the industry is moving towards more automated/semi-automated operations and these manual operations (basic hand tools, hand sewing and hand embroidery) will eventually be phased out in future to the point where they will only be used in the informal sector.

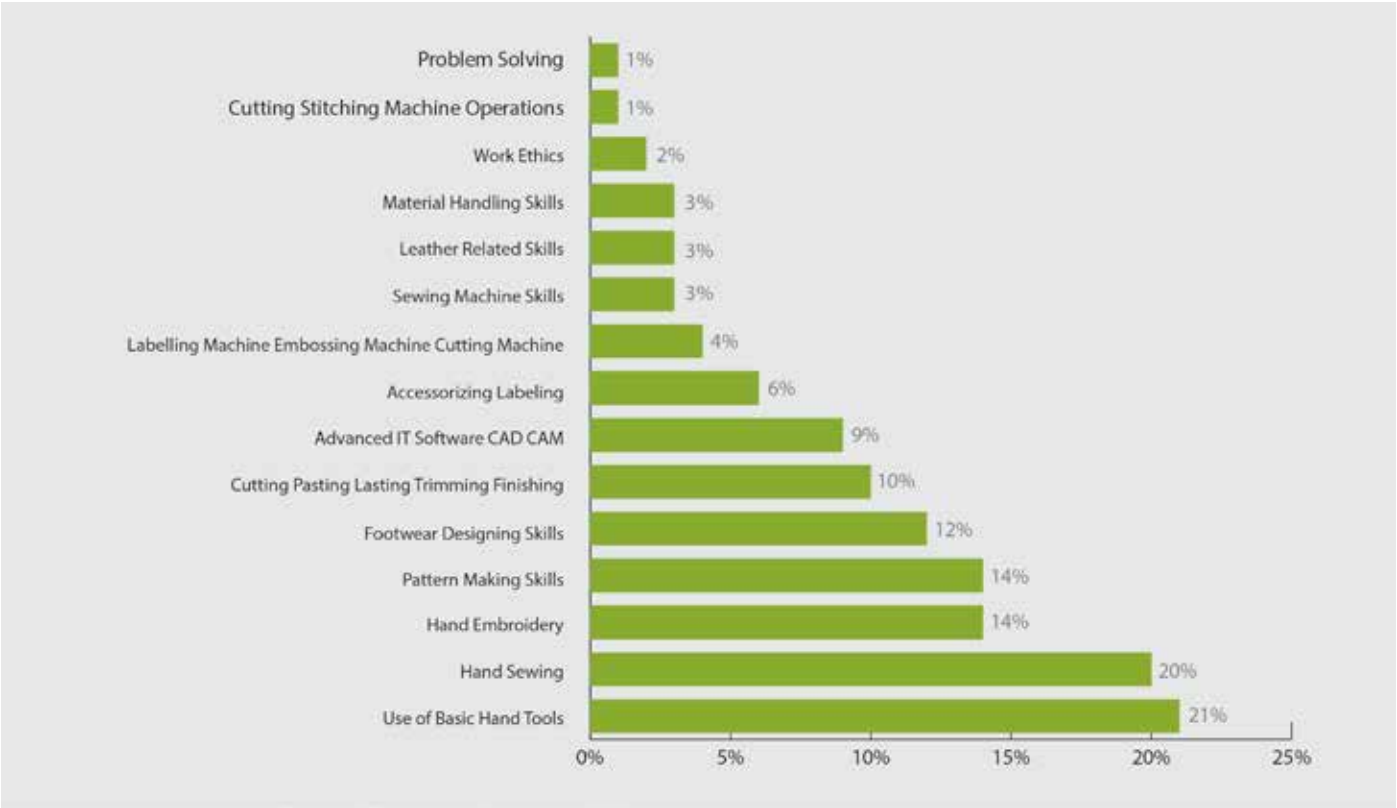


FIGURE 29: SKILLS FOR WHICH DEMAND IS EXPECTED TO DECREASE IN NEXT FIVE YEARS

HARD TO FIND SKILLS

4.5.9 The graphs below depict the responses on ‘hard to find’ skills. As per overall results, footwear designing skills, pattern making skills, advanced IT, cutting stitching operators and color matching quality control are the most ‘hard to find skills’ in the footwear sector.

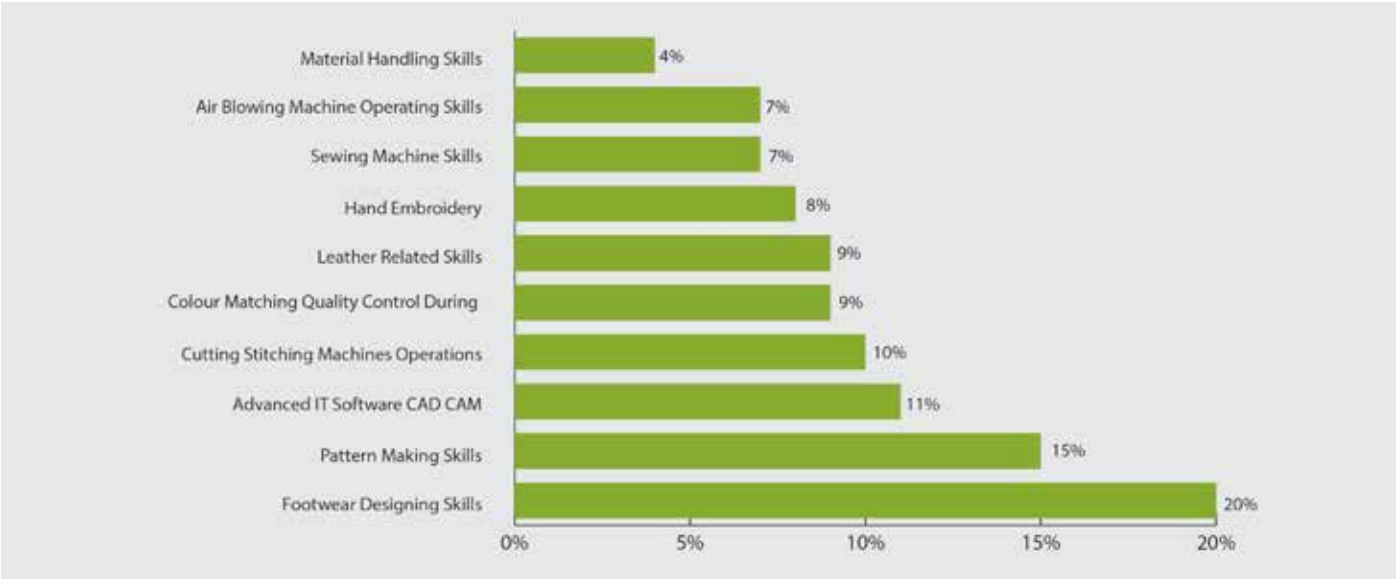


FIGURE 30: HARD TO FIND SKILLS OVERALL %<sup>35</sup>

<sup>35</sup> LEATHER RELATED SKILLS INCLUDE; PREPARING, TREATING AND FINISHING LEATHER TO MAKE IT READY FOR USE IN THE MANUFACTURING OF LEATHER PRODUCTS. THESE ALSO INCLUDE; RESEARCH AND DEVELOPMENT, TESTING NEW WAYS TO USE LEATHER AND WAYS TO IMPROVE PRODUCTION PROCESSES.

4.5.10 Furthermore, a comparison of formal and informal sectors also shows that footwear designing and pattern making skills are ‘hard to find’ especially in formal sector and to some extent in informal sector. However in the informal sector Footwear designing skills, pattern making skills, advanced IT and Hand sewing skills are also most ‘hard to find’ skills. One of the main reasons for this skills shortage in the informal sector is that the people having aforementioned skills join informal/small companies as they provide good learning opportunities. And after having acquired 2-3 years of experience they move on to bigger units attracted by better career prospects and job security which informal units cannot provide creating a continuous gap of skills.

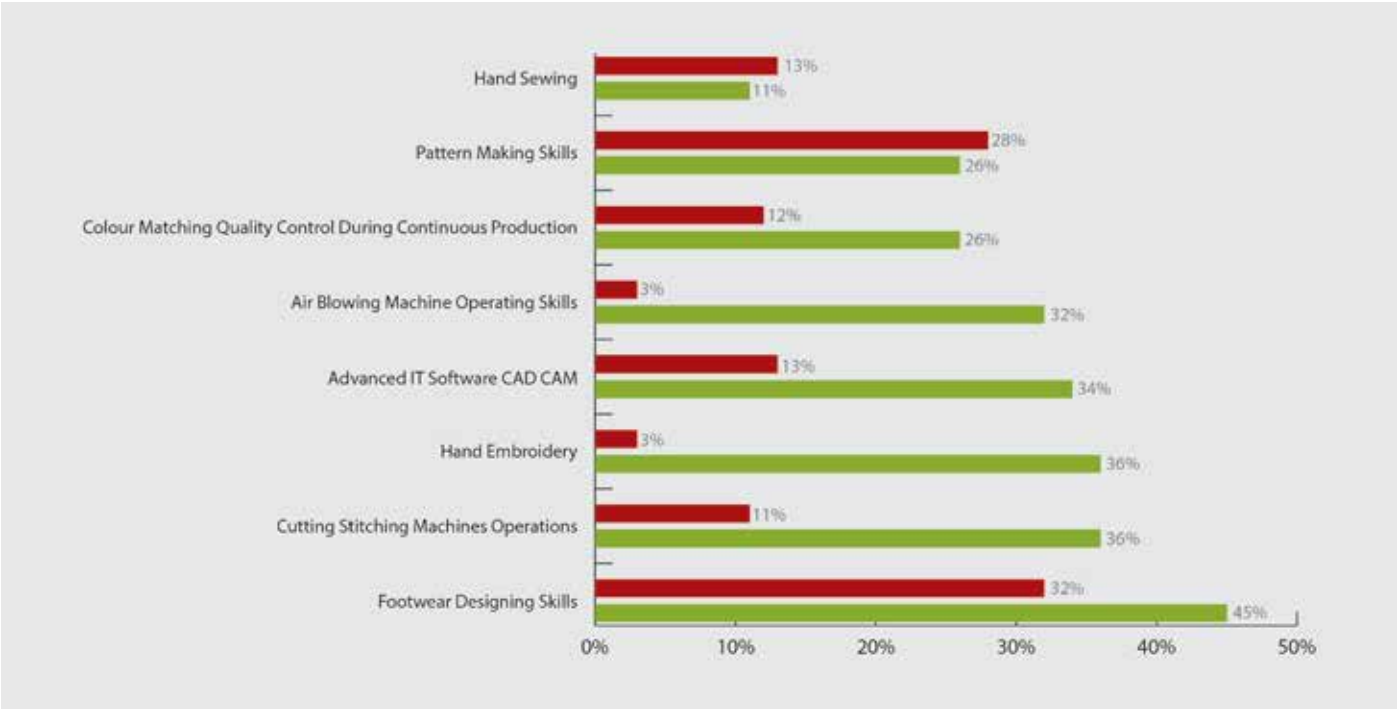


FIGURE 31: HARD TO FIND SKILLS

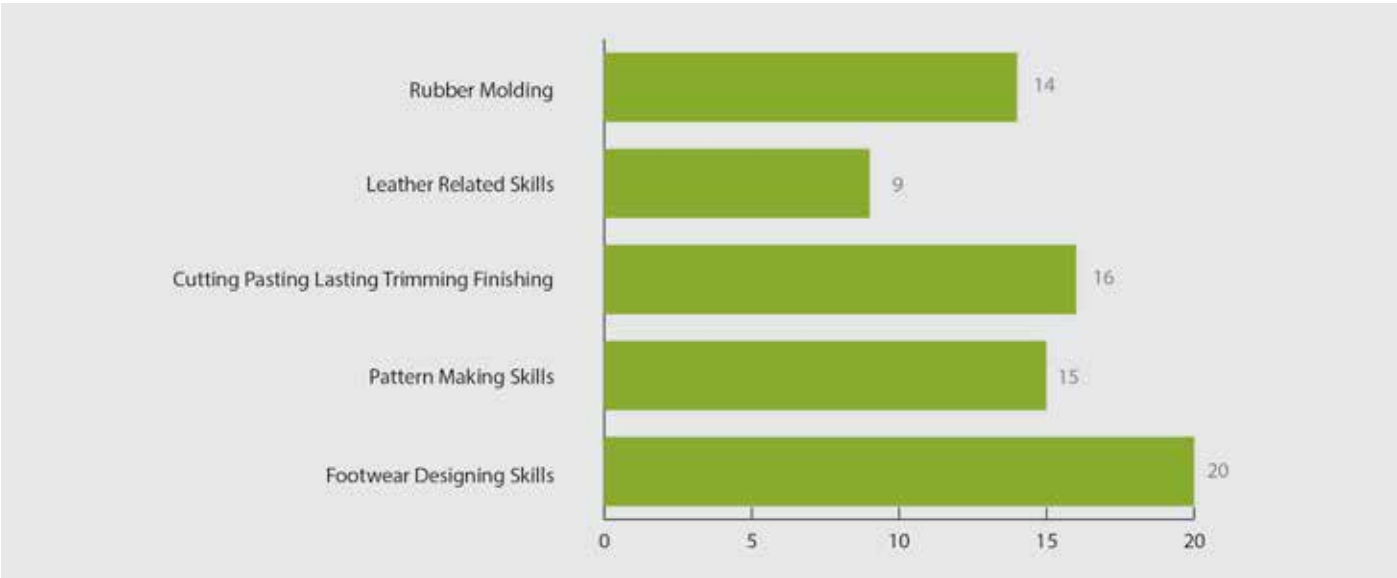


FIGURE 32: TOP 5 HARD TO FIND SKILLS REQUIRED IN NEXT FIVE YEARS

4.5.11 The skills depicted in the above figure 32 will be the top most ‘hard to find’ skills in next five years. In the formal sector footwear designing skills, pattern making skills, advanced IT, cutting/pasting/lasting/trimming, molding machine operating skills, color matching will be the most ‘hard to find’ skills whereas in the informal sector very few respondents could give an answer to this question. According to those in the informal sector who did reply, it is believed that footwear designing would be the most ‘hard to find’ skill, followed by sewing machine skills.

4.5.12 Apart from above, table below depicts further formal and informal units’ bifurcation of Hard to find skills required in next five years (based on survey results).

| Skills required in Next Five Years               | Formal | Informal |
|--|--------|----------|
| Footwear Designing Skills                        | 9%     | 10%      |
| Pattern Making Skills                            | 7%     | 7%       |
| Advanced IT Software CAD CAM                     | 6%     | 4%       |
| Use of Basic Hand Tools                          | 3%     | 7%       |
| Hand Sewing                                      | 3%     | 7%       |
| Hand Embroidery                                  | 2%     | 7%       |
| Cutting Pasting Lasting Trimming Finishing       | 7%     | 10%      |
| Accessorizing Labeling                           | 4%     | 4%       |
| Sewing Machine Skills                            | 5%     | 8%       |
| Material Handling Skills                         | 6%     | 4%       |
| Labeling Embossing Cutting Machine               | 6%     | 4%       |
| Air Blowing Machine Operating Skills             | 5%     | 3%       |
| Plastic Rubber Molding Machine                   | 8%     | 4%       |
| Leather Footwear Processing Machines             | 4%     | 4%       |
| Lab Inspection and Testing                       | 6%     | 7%       |
| Cutting Stitching Machines Operations            | 4%     | 3%       |
| Leather Footwear Processing Skills               | 5%     | 3%       |
| Color Matching Quality Control During Production | 6%     | 1%       |
| Product Evaluation Skills                        | 4%     | 3%       |

TABLE 42: SKILLS REQUIRED IN NEXT FIVE YEARS (HARD TO FIND)

REASONS AND MEASURES

4.5.13 In views of majority of the respondents, the main causes of skills shortages in those areas identified as ‘Hard to Find’ and measures taken by the industry to overcome difficulties in finding these skills are depicted below:

| Causes   | %  |
|--|----|
| Lack of required skills or competencies                              | 33 |
| Lack of required technical skills - practical or job specific skills | 21 |
| Lack of required work experience                                     | 18 |
| Lack of employer interest in training staff                          | 15 |
| Lack of employee interest in training                                | 13 |

TABLE 43: HARD TO FIND SKILLS-MAIN CAUSES/REASONS

| Measures Taken                                   | %  |
|--|----|
| Increase in salaries/compensations               | 37 |
| Individual performance related pay               | 25 |
| Provide both off-the-job and on-the-job training | 18 |
| More/timely staff appraisal                      | 13 |
| Increase recruitment activity                    | 7  |

TABLE 44: MEASURES TAKEN TO OVERCOME HARD TO FIND SKILLS

4.5.14 It can be seen above (Table 43 and Table 44) that majority of the respondents consider lack of required skills or competencies as main cause of skills shortage in those areas identified as ‘Hard to Find’, followed by Lack of required technical skills and Lack of required work experience. Further ‘increase in salaries/compensation’ and ‘individual performance related pay’ are the key measures, in views of most of the respondents, which industry should take to overcome difficulties of dealing with these skills.

SKILLS WHERE TECHNICAL AND VOCATIONAL EDUCATION IS REQUIRED

4.5.15 The figure below depicts the skills in views of the respondents where technical and vocational education is required. Majority of the respondents believe that there should be formal/structured trainings in Advanced IT, Footwear

Designing and pattern making skills.

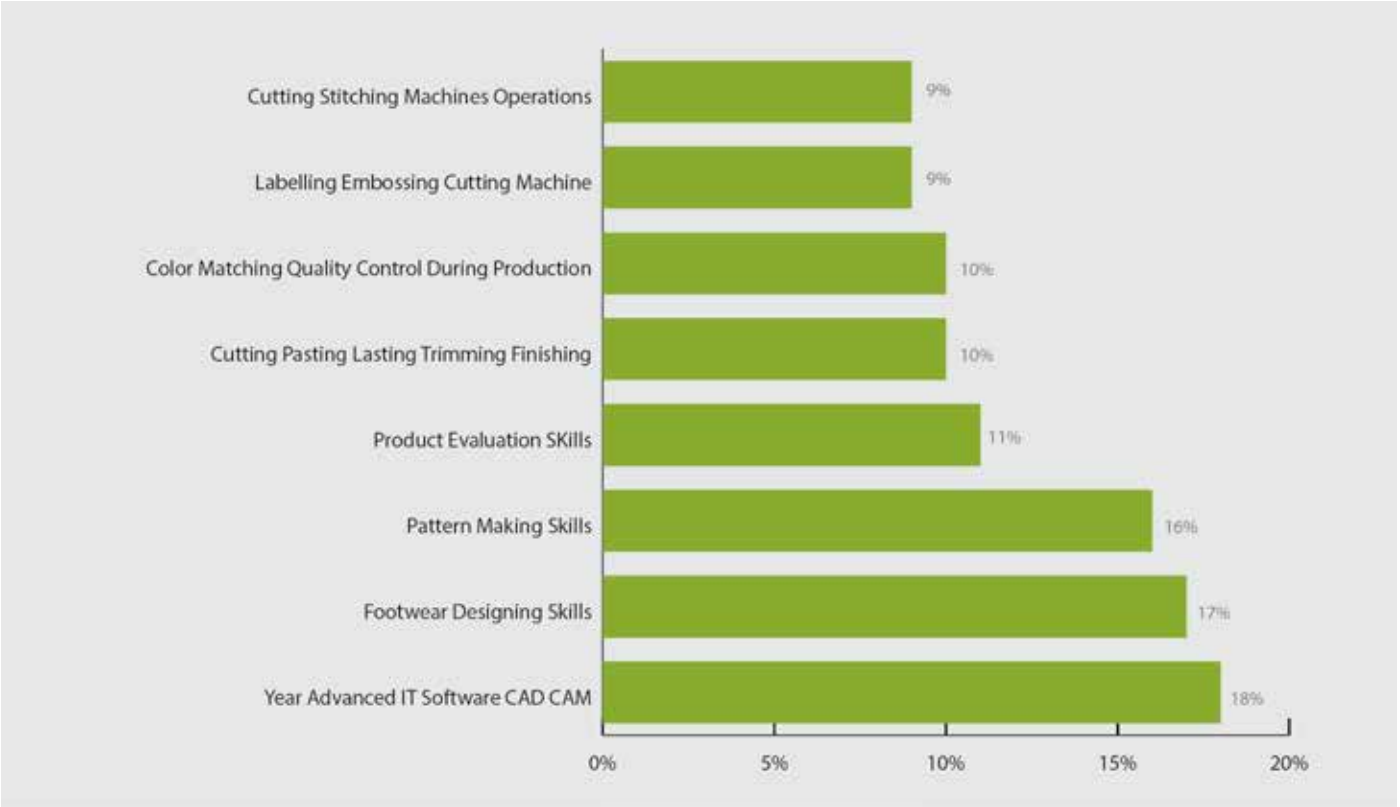


FIGURE 33: TVE SKILLS ASSESSMENT

OFF THE JOB TRAININGS NEEDS

4.5.16 Though most of the respondents especially in informal sector did not share their views but based on the findings from formal sector and those who shared their views from informal sector the skills mentioned in the following graph requires formal off the job trainings. Once again it can be derived from the graph below that footwear designing skills, advanced IT and pattern making skills need proper formal trainings and PSDF can help industry in providing and formalizing short courses and diploma courses for these skills.

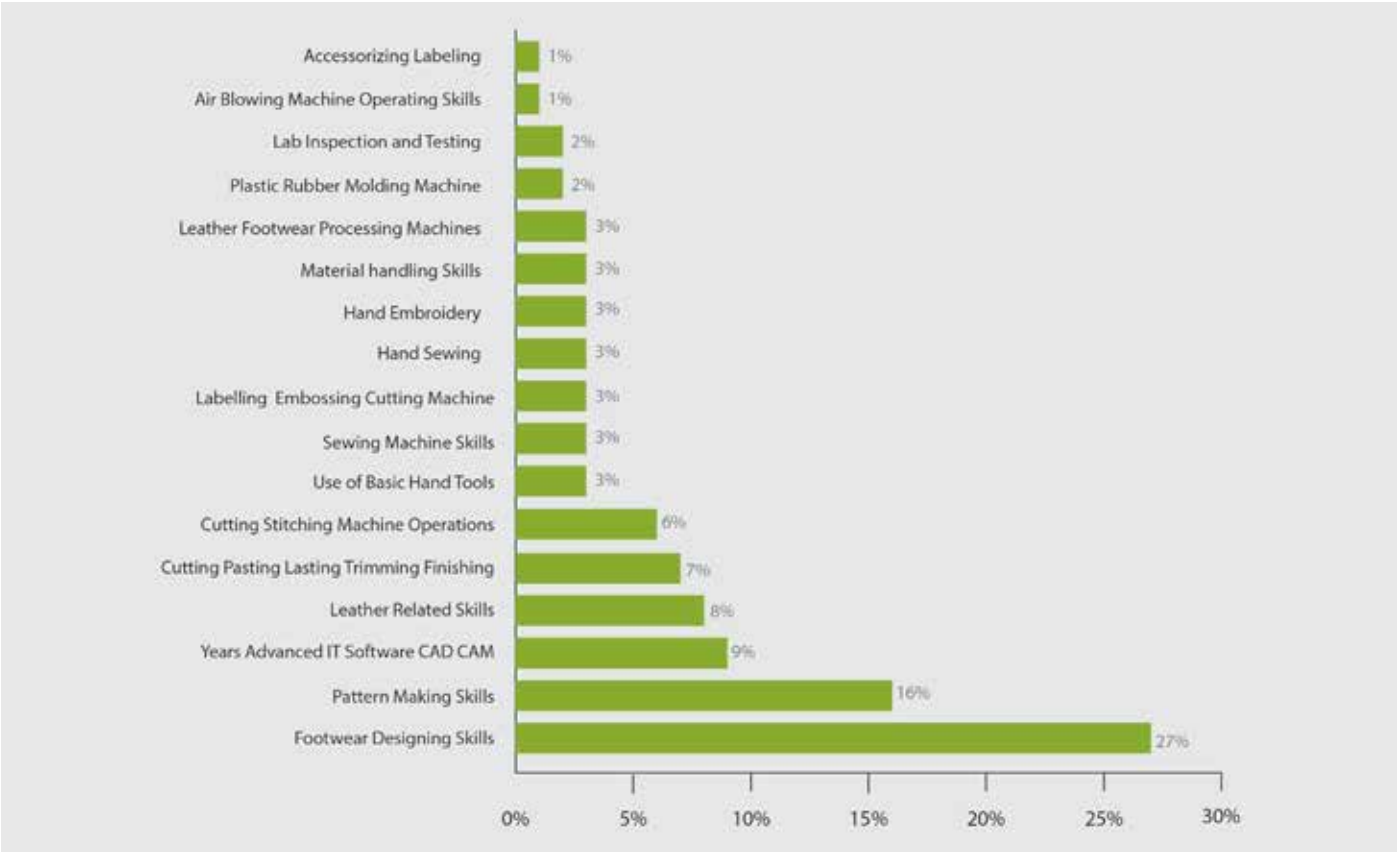


FIGURE 34: OFF THE JOB TRAINING



**4.5.17** The graph below illustrates views of formal and informal sector on skills where off the job trainings are required. As mentioned there is a combined need for footwear designing skills, advanced IT and pattern making skills in both the formal and informal sector. 21% formal and 15% informal units believe that there should be formal trainings in footwear designing skills.

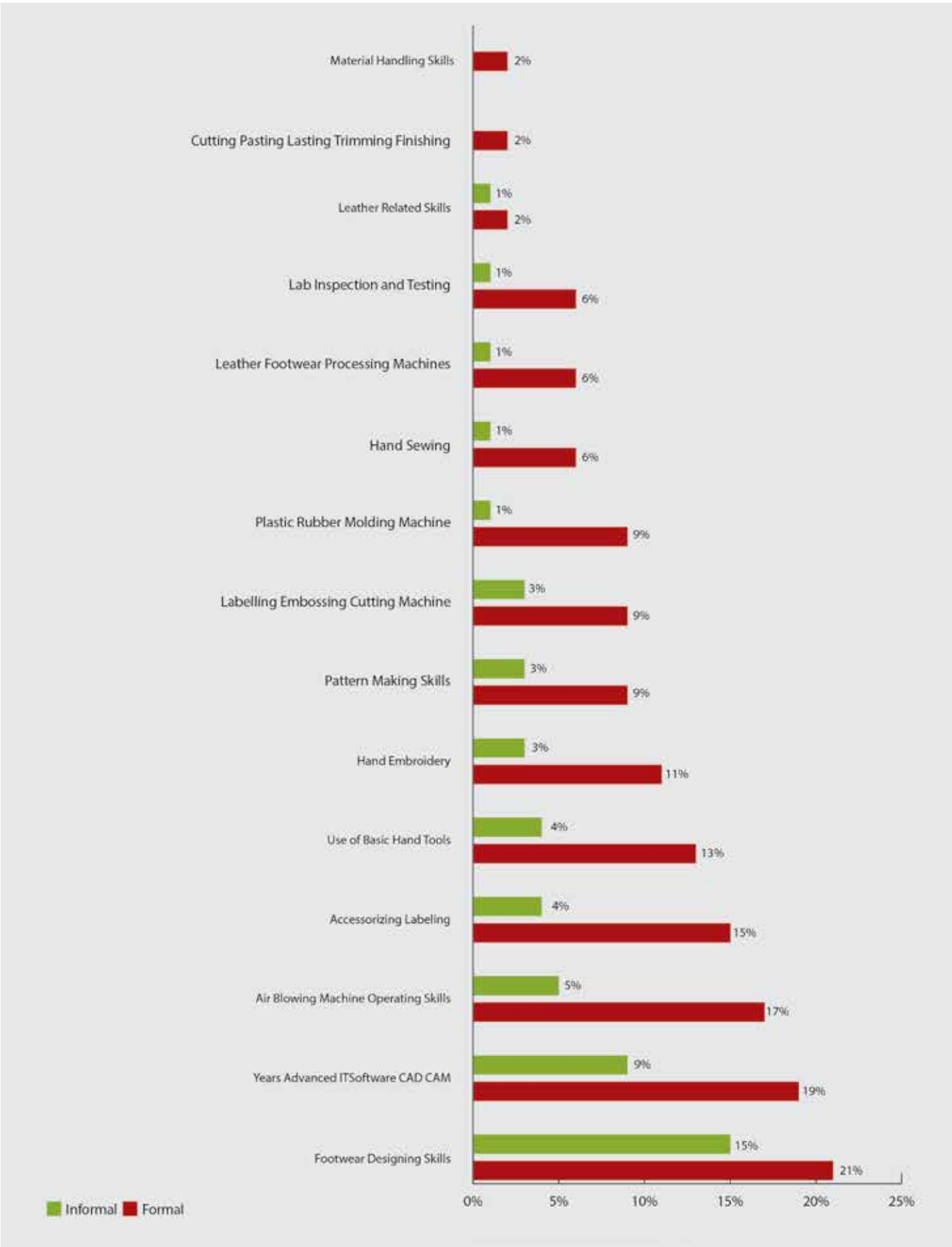


FIGURE 35: OFF THE JOB TRAINING FORMAL AND INFORMAL

**ON THE JOB TRAINING**

**4.5.18** The graphs below show that out of a survey population of 147 respondents (formal and informal units), the most of the OJTs are conducted for;

- Designing skills,
- Pattern making skills and
- Cutting pasting lasting trimming finishing

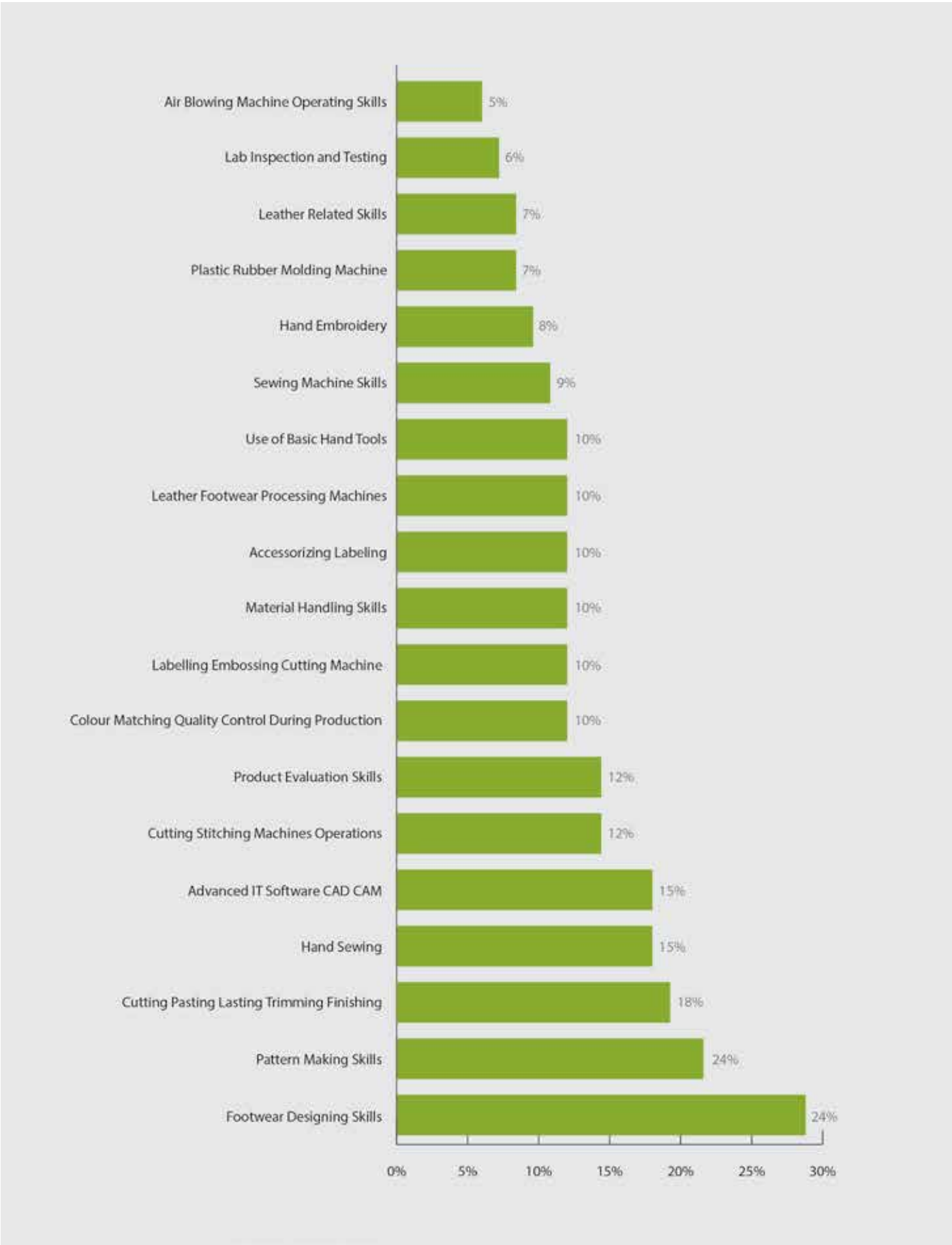


FIGURE 36: ON THE JOB TRAINING OVERALL RESPONDENTS %

4.5.19 Furthermore in the formal sector 40% companies provided OJTs for Hand Sewing skills, higher than in the informal sector where 22% provided similar OJTs.

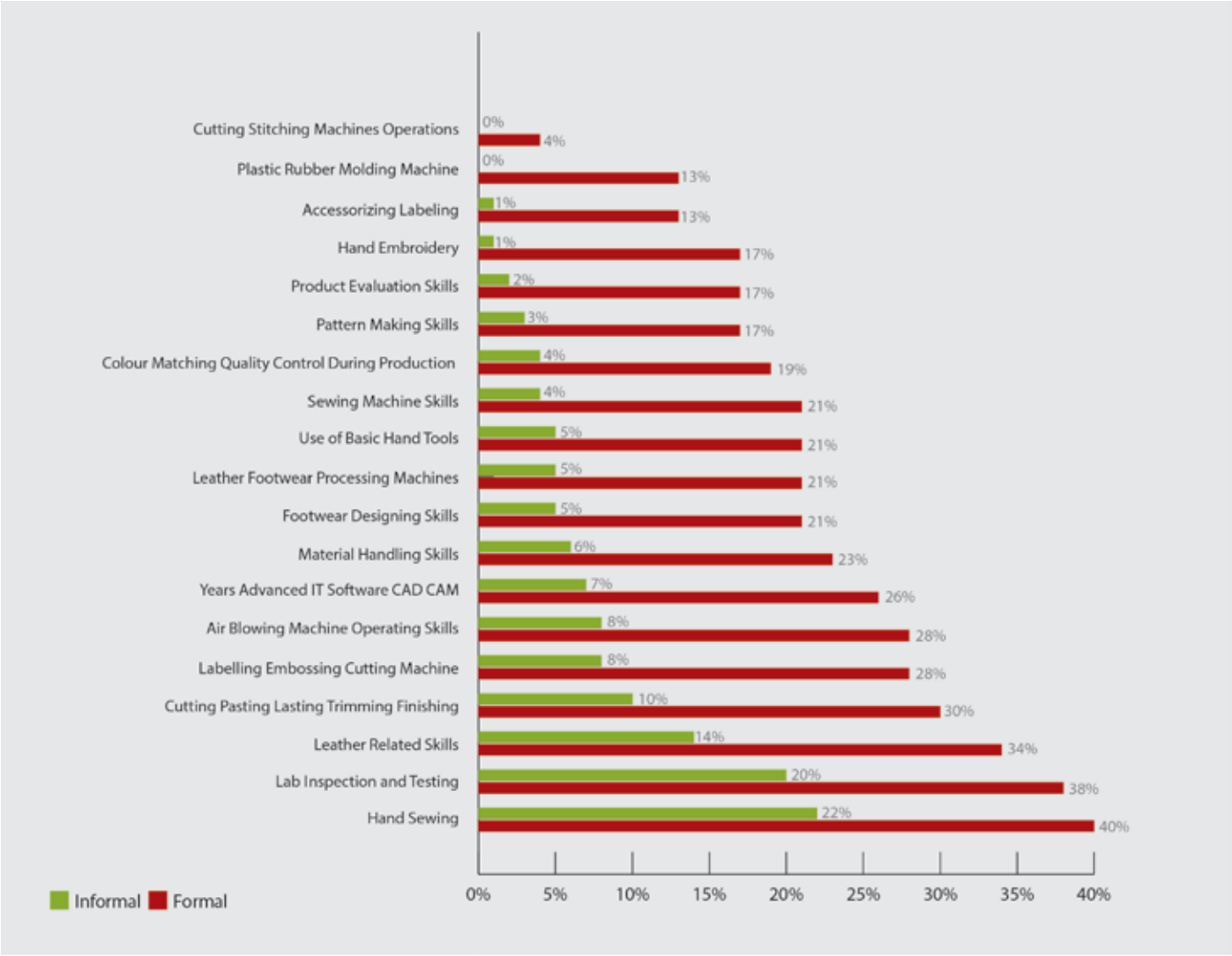


FIGURE 37: ON THE JOB TRAINING FORMAL AND INFORMAL REESPONDENTS

4.6 TRAINING SERVICE PROVIDERS (TSPs)

AWARENESS

4.6.1 The figure below depicts the awareness of various organizations about the training institutions in Punjab. As mentioned, only 24% of the organizations are aware of training providers involved in technical and vocational footwear trainings in Punjab and the majority (76%) are unaware about these institutions.

4.6.2 Amongst those respondents that reported knowledge of TSPs, the institutions that are most known to the organizations are:

- Government institute of Leather & Technology-Gujranwala.
- Pakistan Institute of Fashion Design
- Lahore School of Fashion & Design

4.6.3 It is imperative to note that a very small percentage of this sector is aware about these institutions and

their programs and only 7% of these organizations believe that the training provided is relevant to the skill set required.

4.6.4 Further survey results indicate that only 3% of the organizations receive regular information about various training initiatives and courses from Government Institute of Leather And Technology-Gujranwala, and only 1%reportedthat they receive updates from the Pakistan Institute of Fashion Design and Lahore School of Fashion and Design.

4.6.5 However, it is also good to see that even with this minimum level of awareness, organizations intend to hire graduates from these institutes; 6% mentioned that they intend to hire from Government institute of leather and technology and 5% organizations mentioned that they intend to hire from Pakistan Institute of Fashion and Design.

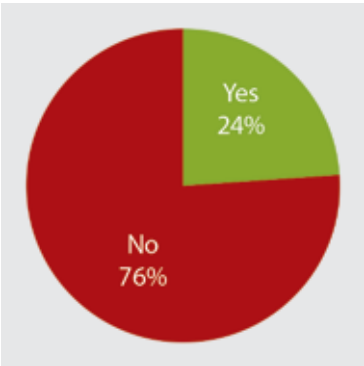


FIGURE 38: ORGANIZATIONS AWARENESS ABOUT TRAINING SERVICE PROVIDERS

WILLINGNESS OF ORGANIZATIONS TO PROVIDE TRAININGS TO STUDENTS OF TSPs

4.6.6 As depicted in the chart below, 28% of respondent organizations are willing to provide OJTs /practical/theoretical training to students of TSPs. Whereas 10% of the respondent organizations did not share their views on this question.

4.6.7 28% of the organizations that showed readiness to provide a forum for practical learning also listed the following skills where they provide OJTs to trainees each year given below:

- Pattern Making
- Footwear Designing
- Advanced IT software
- CAD/CAM
- Cutting
- Lasting
- Finishing
- Health & Safety

4.6.8 Furthermore respondents who were not willing to provide practical training facilities to students of TSPs pointed out the following reasons which are listed in the table below:

| Reasons for not providing practical/theoretical Training to Trainees  | % Of Responses |
|---|----------------|
| Switch jobs once trained-/learn and leave   | 45%            |
| Time Constraints  | 35%            |
| Have Tried Earlier but faced problem/ had bad experience in the past  | 16%            |
| Unwillingness towards work- low energy level, poor / minimal.   | 15%            |
| Lack Basic Skills- literacy skills, numeracy skills , language skills , color matching skills, work ethics, health and safety   | 11%            |
| Low Concentration level- poor / insufficient attention, not able to focus and maintain attention , easily distracted  | 8%             |
| Low productivity – difficulty adhering to schedule, lack of motivation to complete the task assigned, unable to maintain a steady work pace.                                    | 5%             |
| Poor Response to Supervision-rebels against authority, not open and receptive to suggestions, asks for unnecessary guidance and direction, offended by feedback or suggestions. | 5%             |

TABLE 45: REASONS FOR NOT PARTICIPATING

4.7 RECRUITMENT

METHODS FOR HIRING WORKERS

4.7.1 In the footwear industry the most common method for recruitment is referrals by existing employees for both formal and informal units. 79% of the informal units use employee referrals as a method for recruitment, while 66% of the formal units use the same as depicted in below table. Using references of existing employees helps to improve the recruitment process as the new employees will already be well aware of the working environment and they would not have the unrealistic expectations. This may also help in the retention of employees and in maintaining an efficient employee turnover rate.

4.7.2 15% of the formal units also place notices of vacancies at the factory gate, as sometimes it turns out to be an efficient method of recruitment. This method usually saves the time and cost of the employer (cost of advertising). Furthermore, only 6% of the formal units use advertisements in the newspaper as a method for attracting potential candidates. It is also revealed that the more established brand owners such as Servis shoes, BATA,

Stylo, to name a few, mostly place ads in the newspaper to attract candidates. About 17% of the informal units and 11% of formal units also use labor contractors as a means for recruitment.

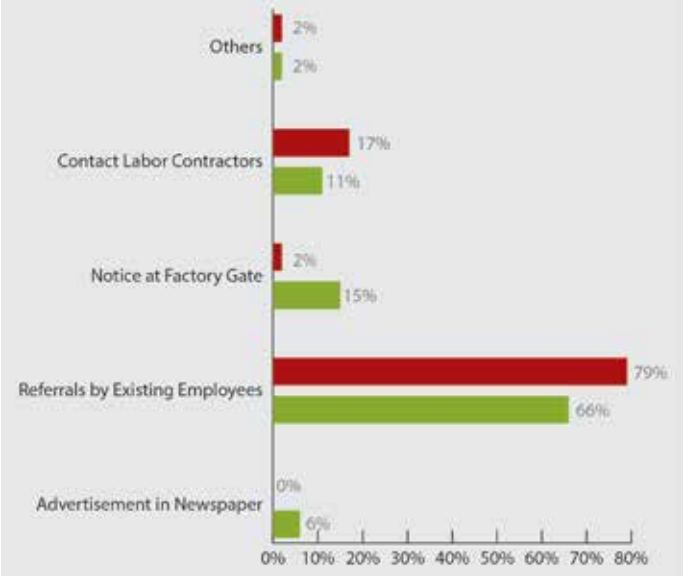


FIGURE 40: METHODS USED FOR RECRUITMENT

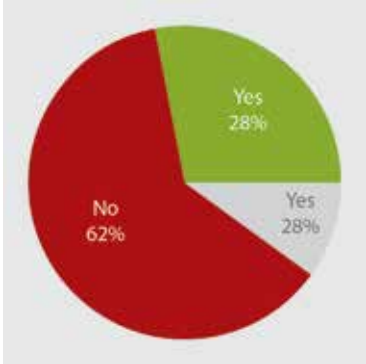


FIGURE 39: WILLINGNESS OF ORGANIZATIONS TO PROVIDE OJTs TO STUDENTS UNDERTAKING TRAINING COURSES



**4.7.3** Out of 147 organizations, 103 (70%) organizations responded that they prefer to hire workers who hold formal diploma/certifications (Matric, Intermediate, diplomas, courses etc.). 87% (41 units out of 47) formal units prefer to hire diploma/certificate holders whereas 62 (62%) informal units prefer to hire workers with some kind of certificates/diplomas in footwear technology.

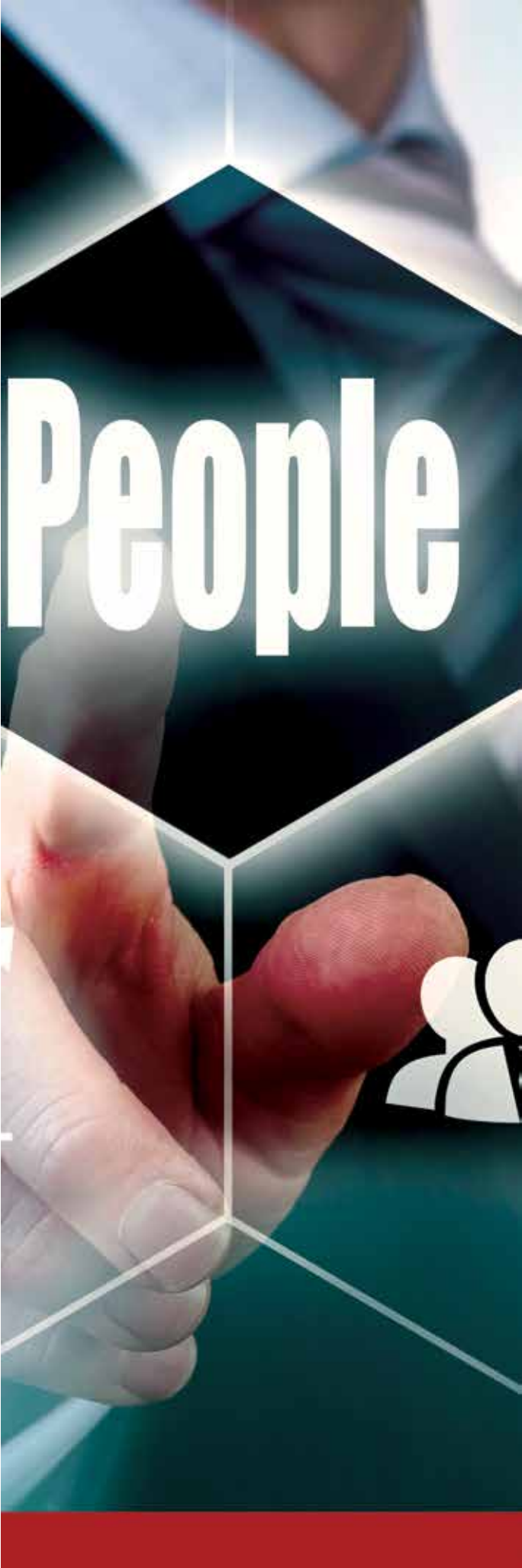
**4.7.4** 7% (out of those who prefer to hire diploma/certificate holders) of the organizations prefer to hire people who have some kind of formal education in upper and bottom making, pattern making, basic shoe making, finishing and footwear designing, followed by closing (6%) and pattern making, machine stitching, cutting clicking, hand stitching and quality control (5%). The overall response is shown below;

| HIRING /RECRUITMENT TRENDS        | Overall Results |
|-----------------------------------|-----------------|
| Upper and Bottom Making           | 7%              |
| Pattern Making                    | 7%              |
| Basic Shoe Making                 | 7%              |
| Finishing                         | 7%              |
| Footwear Designing                | 7%              |
| Closing                           | 6%              |
| Pattern Making                    | 5%              |
| Machine Stitching                 | 5%              |
| Cutting Clicking                  | 5%              |
| Hand Stitching                    | 5%              |
| Quality Control                   | 5%              |
| Basic Hand Tools                  | 4%              |
| Feet Anatomy                      | 4%              |
| Shoe Assembling                   | 4%              |
| Basic Machine                     | 4%              |
| Shoe Lasting                      | 3%              |
| CAD/CAM                           | 2%              |
| Leather Technology                | 2%              |
| Others                            | 2%              |
| Machine Repair Maintenance        | 2%              |
| Material Handling                 | 2%              |
| Molding                           | 2%              |
| Shoe Repairing                    | 2%              |
| Performing Table Based Operations | 1%              |

TABLE 46: HIRING PREFERENCE IN VIEWS OF RESPONDENTS

TYPE OF WORKERS HIRED

**4.7.5** Out of 147 organizations, 80 organizations (47 formal and 33 informal) shared their data on the types of workers they hired in last two years. The table below shows the hiring scenario for the last two years in these 80 organizations:



| Types of Workers Hired         | Number of workers hired | Male workers | Female Workers | Hired on New Jobs | Hired as Replacement | Still Working |
|--------------------------------|-------------------------|--------------|----------------|-------------------|----------------------|---------------|
| Stitching/ Lasting Supervisors | 230                     | 179          | 51             | 100               | 130                  | 222           |
| Stitchers                      | 200                     | 160          | 40             | 80                | 120                  | 191           |
| Footwear Designers             | 121                     | 100          | 21             | 51                | 70                   | 110           |
| Upper/Bottom making            | 108                     | 77           | 31             | 48                | 60                   | 104           |
| Pattern makers                 | 92                      | 58           | 34             | 40                | 52                   | 79            |
| Worker/Basic Skills            | 182                     | 129          | 53             | 73                | 109                  | 157           |
| Production Manager             | 12                      | 8            | 4              | 3                 | 9                    | 9             |
| Manager Stitching              | 15                      | 12           | 3              | 6                 | 9                    | 13            |
| Machine operator               | 141                     | 131          | 10             | 61                | 80                   | 137           |
| Labors                         | 280                     | 210          | 70             | 121               | 159                  | 271           |

TABLE 47: HIRING/RECRUITMENT SCENARIO FOR THE LAST TWO YEARS HIRED

**4.7.6** As depicted in table above, majority of companies hired stitching/lasting supervisors and stitchers, followed by footwear designers. Further above table indicates that majority of the workers hired in last two years (for each job type/category mentioned in above table) were males.

TRADES FOR WHICH WOMEN WERE HIRED

**4.7.7** A significant percentage of the respondents, 42% (62 respondents), hire women. Of these, 37% hire women at middle management level and 63% hire at workers level. The Following table depicts the trades for which respondent companies hired women both at middle management and at worker level. It can be seen that at middle management level majority of respondent companies hired women for footwear design department, similarly at worker level they hired women for pattern making department.

| Middle Management Level                     | %  | Workers Level   | %  |
|---|----|---|----|
| Footwear Design Engineer/Footwear Designers | 29 | Pattern Makers  | 30 |
| Stitching/Lasting Supervisors               | 24 | Stitchers (Hand operation/ machines)                            | 23 |
| Manager Stitching                           | 19 | Upper/bottom makers   | 19 |
| Quality Assurance Manager                   | 14 | Labor   | 18 |
| Production Managers                         | 14 | General Workers/Basic Skills(Cutting, Stitching, Edging trades) | 10 |

TABLE 48: TRADES FOR WHICH WOMEN WERE HIRED

HARD TO FILL VACANCIES

**4.7.8** It can be seen that ‘footwear design engineer’ is the most hard to fill vacancy followed by ‘Advanced IT CAD/ CAM engineer’. Whereas at worker level, pattern maker and trimming/finishing machine operator are the most ‘hard to fill vacancies’.

| Hard to fill Vacancies            |               |                                     |               |
|-----------------------------------|---------------|-------------------------------------|---------------|
| Middle Management Level           | % of response | Worker Level                        | % of response |
| Footwear Design Engineer          | 45            | Pattern maker                       | 42            |
| Advanced IT- CAD/ CAM engineer    | 32            | Trimming/Finishing machine operator | 32            |
| Color Matching/quality controller | 23            | Sewing machine operator             | 26            |

TABLE 49: HARD TO FILL VACANCIES

4.8 AWARENESS OF PSDF

**4.8.1** As depicted in table below, majority of the organizations (90%) are unaware of PSDF’s, its role, vision, mission & responsibilities and programs that are being initiated in the province of Punjab. Out of these organizations that are unaware of PSDF, 37 organizations (79%) are from the formal sector, which represents an opportunity for PSDF to engage with the sector in a more productive manner.

| Awareness of PSDF | Total |    | Formal |    | Informal |    |
|-------------------|-------|----|--------|----|----------|----|
|                   | Units | %  | Units  | %  | Units    | %  |
| Yes               | 14    | 10 | 10     | 21 | 4        | 4  |
| No                | 133   | 90 | 37     | 79 | 96       | 96 |

TABLE 50: AWARENESS OF PSDF

**4.8.2** Recommendations and suggestions for PSDF from our respondents are as follows:

- PSDF should work towards introduction of short courses for existing human resources and students to cater to the growing demand of specific skill set. These short courses can inject skilled people at faster pace catering to specific area of specialty.
- PSDF should take some prompt steps so that the courses offered in TSPs should be introduced and designed with the help of industry experts and representatives along with practical learning

## 4.9 WILLINGNESS TO ACT AS TSPs

**4.9.1** More than half (56%) of the respondents have indicated their willingness to serve as TSPs to this sector. Details of the findings are given in the table below:

| Intention to Setup Footwear Training Institute within Facility |  | Overall Results   |    | Nature of Establishments |    |                      |    |
|--|--|-------------------|----|--------------------------|----|----------------------|----|
|  |  | Total units (147) |    | Formal units(47)         |    | Informal units (100) |    |
|  |  | Units             | %  | Units                    | %  | Units                | %  |
| YES  | Self-Financing   | 1                 | 1  | 1                        | 2  | -                    | -  |
|  | PSDF Supporting Program                                    | 79                | 54 | 16                       | 34 | 63                   | 63 |
|  | Any other institute willing to support / finance the setup | 1                 | 1  | 1                        | 2  | -                    | -  |
| NO   |  | 66                | 44 | 29                       | 60 | 37                   | 37 |

TABLE 51: INTENTION TO SETUP FOOTWEAR TRAINING INSTITUTE WITHIN FACILITY

**4.9.2** It has emerged that out of a survey population of 147 respondents (formal and informal units), 56% of the respondents (81 units) have shown willingness to set up a training facility in their manufacturing premises. It has also appeared that 54% of the respondents would like to have PSDF's support (PSDF supporting programs) to setup a footwear training institute within the facility. However, only 2% of the respondents are willing to invest their own capital or might collaborate with other training services.44% of the respondents (66 units) do not think of the training facility as a necessity, as in their opinion on-the-job trainings provided during the initial phase of employment is more important.

**4.9.3** It is surprising to note that out of the 81 organizations who wish to set up training facilities in their premises, 63% of them are informal establishments. On probing, these units clarified that while they are open to the idea they do not have sufficient space and resources to manage and effectively run a training facility. They mentioned that they want to give something back to the industry and country and would definitely seek advice and help from PSDF. They also indicated that they were prepared to send their managerial/technical staff as trainers to such institutes and were ready to communicate with PSDF in this regard.

## 4.10 RETAIL OPERATIONS

**4.10.1** It emerged that only 35% of the total footwear units do their own retail. Out of these, only 15% are formal units having a proper retail set-up and 20% are informal units; cottage units with small production unit and a shop, housed at location. It emerges that footwear units rely heavily on 3rd party distributors and their distribution channels.

**4.10.2** Most of the staff employed in retailing is permanent in both formal and informal units, whether they are managers, sales staff or junior sales staff. There is however a small percentage of employees in both formal and informal units who are contractual. It appears that for retail setups, footwear units prefer to engage employees on a long term basis in order to teach them the relevant skills and retain them.

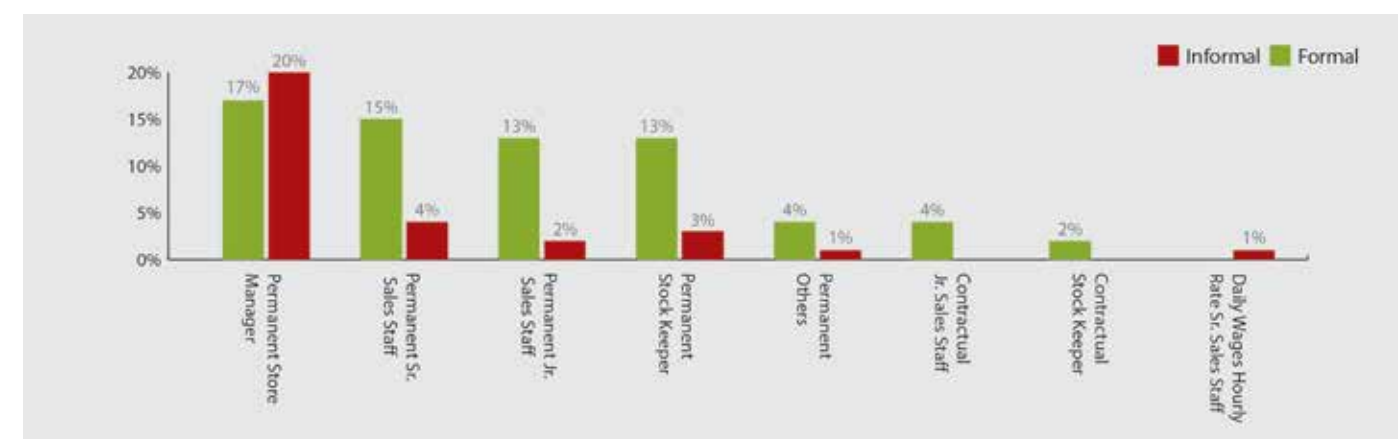


FIGURE 41: EMPLOYMENT STATUS

**4.10.3** The range of qualifications of employees hired for retail at footwear companies has shown no specific trend. There seemed to be wide variations in the qualifications of employees hired. There are employees such as store managers who have a graduate degrees working in formal units. However, the senior and junior sales staff has only basic qualifications such as Matriculation or Intermediate certificate.

**4.10.4** Furthermore, it has also emerged from the survey that majority of the companies involved in retailing do not send their employees for off-the-job trainings. They rely more on on-the-job trainings and the inducted staff goes through an in-house training process. Though majority of the respondents (32 out of 51)were reluctant to share the information regarding OJTs (retail related) provided in their companies, but among those who responded (19 respondents),22%respondent companies provide on the job trainings to their store managers. Further 11 % of the senior sales staff, 7% of the junior sales staff and 9% of the stock keeper staff are also trained on the job (by these 19 companies) as shown in chart below. The employees who receive on the job training usually do not have a standard training module.

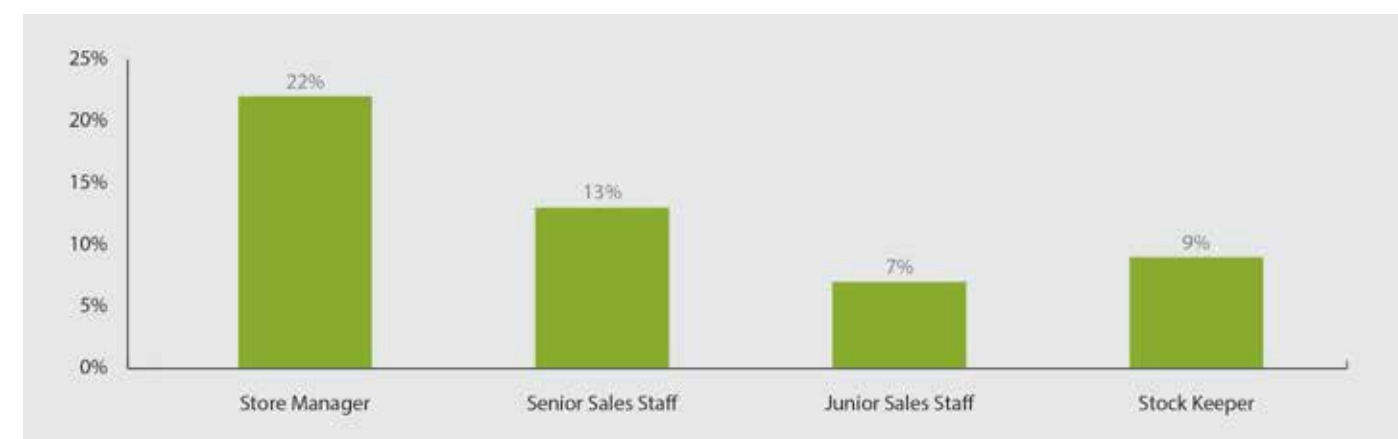


FIGURE 42: OJT PROVIDED

**4.10.5** The survey has revealed that 3% of footwear units trained employees on the job for merchandizing, windows display and cash management skills respectively. These specific tasks are focused upon during training as they are directly related to the sales of the product. A small percentage, 2%, of the footwear manufacturers train their employees on customer handling. Only, 6% of the footwear manufacturers focus on building soft skills for the employees.

**4.10.6** The most essential skills required in footwear retailing, as per the majority of the respondents, are soft skills. At the time of recruitment, footwear units are inclined towards hiring workers who have better soft skills such as communication, good work ethic, customer handling skills, numeracy skills. These have emerged as important as not only are they essential for retail sales and operations, it also becomes a tedious task for the supervisors and managers to manage employees who do not have these skills.

**4.10.7** Language variation has also emerged as a needed requirement for this sector. Most employees speak the regional language and contribute to incidences of poor customer handling. For example employees who can only speak and understand one language do not do as well as those that are multilingual. Furthermore, respondents indicated that they felt it key for employees to understand methodologies and practices in merchandizing and cash management. The below table depicts the essential skills required in footwear retailing as indicated by the respondents:



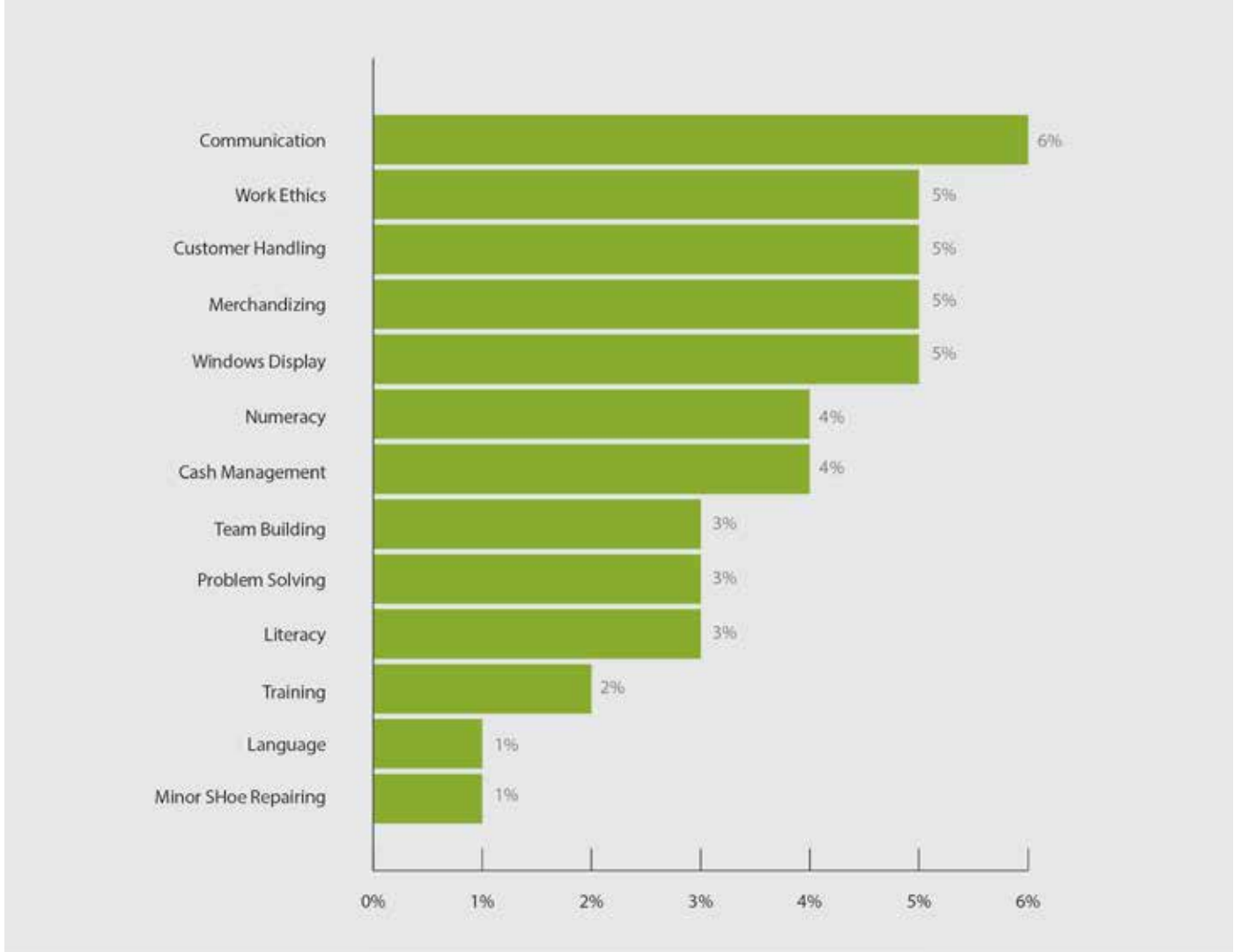


FIGURE 43: SKILLS REQUIRED IN RETAIL

#### SKILLS REQUIRED IN THE NEXT 5 YEARS FOR RETAIL

**4.10.8** Majority of the organizations responded that merchandising, customer handling, teambuilding, minor shoe repairing skills will be easy to find in the next 5 years. 33% organizations pointed out that problem solving skill which is the core essence of workforce management and customer handling will be difficult to find, which may lead to slowing down of the order to delivery process.

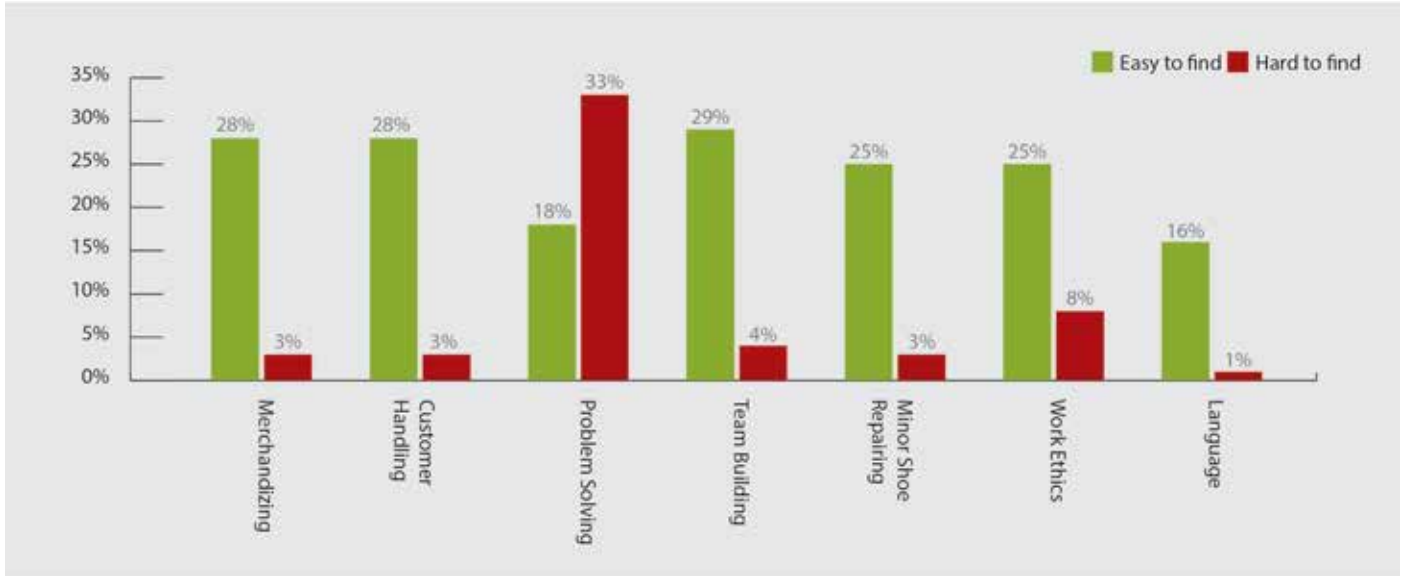


FIGURE 44: SKILLS REQUIRED IN THE NEXT 5 YEARS

**4.10.9** The survey results of establishments associated with retailing indicate that in the next 5 years the demand for soft skills will increase at a fast pace. 22% believe that customer handling will increase, followed by problem solving, team building and minor shoe repairing (19% each).

#### HARD TO FIND SKILLS

**4.10.10** Respondents active in footwear retail (7 formal and 9 informal retail units out of total 51) believe that soft skills like conflict management, communication skills, team building and customer handling skills are 'hard to find' at present and they will continue to be in demand over the next 5 years.



FIGURE 45: FOOTWEAR SECTOR SKILLS IN DEMAND DURING NEXT 5 YEARS



## 5 DETAILED FINDINGS—TRAINING SERVICE PROVIDERS (TSPs)





5.1 INTRODUCTION

5.1.1 As part of the survey the consultants conducted in-depth interviews of existing TSPs (list of these TSPs is included in the annex) actively providing their services in Punjab, in order to capture the current training supply to the footwear sector and identify any gaps in training supply. Emergent findings are provided herein for the reader's consideration.

5.2 PROFILE AND COURSES OFFERED

5.2.1 The current state of TSP support to the sector is apparently less than desirable. TSPs selected for the survey represented a cross section of TSPs that were providing skill development support to the sector. It emerged from our survey that the TSPs themselves require additional up gradation to meet the needs of the sector in the province.

5.2.2 The brief profiles of major TSPs along with their institutional and managerial capacities are depicted in the table below:

|   | Government Institute of Leather & Technology (GILT) | BATA Pakistan Limited                     | Pakistan Institute of Fashion & Design (PIFD) | University of Management Technology- School of Textile & Design | Footwear Training Institute Charsadda (FTIC) |
|---|---|---|---|---|--|
| Year of Establishment   | 1949  | 1951                                      | 1994  | 1992  | 2003   |
| Type of entity  | Government (TEVTA)                                  | Private Limited                           | Public Body                                   | Private Body  | A Project of TDAP and GOP                    |
| Total no. of Instructional/ Teaching staff (Permanent)                                | 10  | Information Not Provided                  | 300   | 400   | 5  |
| Total Instructional/ teaching staff (Part Time/Visiting)                              | 4   | Information Not Provided                  | 120   | 150   | N/A  |
| Total number of current Students  | 300   | 75  | 250   | 8,000   | 50   |
| Number of students passed out in last five years or since inception                   | 1875  | Around 800 to 1000 people in last 5 years | 2000  | 5,500   | 650  |
| Average graduates /certificates and diploma holders your institution produce per year | 200   | Information Not Provided                  | 150-200                                       | 1,100   | 45   |
| Conduct Regular Audits  | YES   | YES                                       | YES   | YES   | NO   |
| How many branches are in Punjab   | 0   | Information Not Provided                  | 2   | 1   | N/A  |

TABLE 52: ORGANIZATIONAL PROFILE

COURSE LEVELS

5.2.3 This section provides a brief introduction of each Training Service Provider along with the courses/programs levels on offer.

INTRODUCTION

The Footwear Training Institute, Charsadda was established by the Government under management of Trade Development Authority of Pakistan, Ministry of Commerce and Charsadda Chappal Makers Association in 2003. The table below depicts the Courses/programs levels related to footwear sector that are being currently supplied by the Footwear Institute Charsadda, KPK;

INSTITUTE

FOOTWEAR TRAINING INSTITUTE CHARSADDA (FTIC)

| TSPs                                  | Program              | Eligibility Criteria |                        |               | Course Duration | Fee Structure       |                 | No. Of Seats Available | Course Content  | Examining Body |
|---------------------------------------|----------------------|----------------------|------------------------|---------------|-----------------|---------------------|-----------------|------------------------|---|----------------|
|                                       |                      | Age                  | Education              | Gender (M, F) |                 | Open = O            | Scholarship = S |                        |   |                |
|                                       |                      |                      |                        |               |                 |                     |                 | Total                  |   |                |
| Footwear Training Institute Charsadda | Designing/Sketching  | 18-30                | Middle school / Metric | F             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Pattern Making       | 18-30                | Middle / Metric        | M             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Cutting              | 18-30                | Middle / Metric        | M             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Stitching            | 18-30                | Middle / Metric        | F             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Sewing               | 18-30                | Middle / Metric        | F             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Closing              | 18-30                | Middle / Metric        | M             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Upper Making         | 18-30                | Middle / Metric        | F             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Lasting/Last Making  | 18-30                | Middle / Matric        | M             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Finishing Techniques | 18-30                | Middle / Matric        | M             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Work Safety          | 18-30                | Middle / Matric        | F             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       | Shoe Repair          | 18-30                | Middle / Matric        | F             | 6 months        | O = 500<br>S = 1500 | 50              | -                      | Technical Board Peshawar and Skill Development Section FATA |                |
|                                       |                      |                      |                        |               |                 |                     |                 |                        |   |                |





| INSTITUTE   |   |   |   | INTRODUCTION             |               |                 |                                    |                 |   |  |                |                |
|---|---|---|---|--------------------------|---------------|-----------------|------------------------------------|-----------------|---|--|----------------|----------------|
| UNIVERSITY OF MANAGEMENT TECHNOLOGY<br>SCHOOL OF TEXTILE & DESIGN |   |   | <b>5.2.4</b> UMT, established in 1992, is operating as a private body and offering courses including Bachelors of Fashion Design-Specialization in Leather Accessories & Footwear and Bachelor of Science in Leather Technology with 1 Module in Footwear Technology. It is in partnership with many foreign universities and local bodies including TEVTA. |                          |               |                 |                                    |                 |   |  |                |                |
| S. No   | TSPs  | Program                                   | Eligibility Criteria  |                          |               | Course Duration | Fee Structure                      |                 | No. Of Seats Available  |  | Course Content | Examining Body |
|   |   |   | Age   | Education                | Gender (M, F) |                 | Open = O                           | Scholarship = S | Total   |  |                |                |
| 1   | University of Management Technology - School of Textile &Design | Bachelor of Fashion Design                | 18  | Intermediate or A Levels | M/F           | 4 Years         | Semester wise<br>Total Rs. 650,000 | 40-50           | <input type="checkbox"/> Marketing & merchandising<br><input type="checkbox"/> Shoe Repairing & Work Safety<br><input type="checkbox"/> Research techniques<br><input type="checkbox"/> Basic shoe designing and techniques<br><input type="checkbox"/> Geometric shapes<br><input type="checkbox"/> Waste management and utilizing material<br><input type="checkbox"/> Creating designs on computer software.<br><input type="checkbox"/> Material content on shoe sizes, sole and upper designs and etc.   |  |                |                |
| 2   |   | Bachelor of Science in Leather Technology | 18  | Intermediate / A2 Levels | M/F           | 4 years         | Semester wise Total<br>Rs. 650,000 | 30-40           | <input type="checkbox"/> Different designs of men's and women's shoes<br><input type="checkbox"/> Stitching techniques on both machinery and by hand<br><input type="checkbox"/> Closing techniques on different styles of shoes<br><input type="checkbox"/> How to work on the last making while designing shoes<br><input type="checkbox"/> Applying finishing techniques on shoes with different designs (basic knowhow)<br><input type="checkbox"/> One module covers entire product development along with use of different kind of machinery (mainly theoretical work)<br><input type="checkbox"/> CAD and design software are being taught |  |                |                |
| TABLE 56: UMT – SCHOOL OF TEXTILE & DESIGN                        |   |   |   |                          |               |                 |                                    |                 |   |  |                |                |

**5.2.5** The table below provides details of courses for the footwear sector that have really good career prospects/ higher employability and are in demand. The table also depicts scenario of ‘post successful course completion’ after completion of these courses.

| S. No | Program  | Starting Salary                 | Employability   | Post Successful course completion                            |   |
|-------|--|---------------------------------|---|--|---|
|       |  |                                 |   | Sector/ trade/ Company                                       | Comments  |
| 1     | Diploma of Associate Engineering (DAE)               | Rs. 10,000+                     | DAE has a higher employability due to its demand in the industry.   | Tanneries Footwear Industry Big Brand (Bata/Servis)Teaching  | Within 1 Year of Graduating they reach the salary of around Rs. 25,000+   |
| 2     | Stitching and Design Making                          | Rs. 10,000+                     | Higher employability  | Footwear Industry Big Brand (Bata/Servis) Teaching           | Within 1 Year of Graduating they reach the salary of around Rs. 25,000+   |
| 3     | Last Making  | Rs. 10,000+                     | Higher employability  | Tanneries Footwear Industry Big Brand (Bata/Servis) Teaching | Within 1 Year of Graduating they reach the salary of around Rs. 25,000+   |
| 4     | BS/Bachelor Design of Leather Accessories & Footwear | Minimum Rs. 35,000              | Employability is very high (last year was 100%)   | Companies such as Nishat, Stylo etc.                         | Graduates prefer to move into the industry towards big brand names and large organizations.                                     |
| 5     | Bachelor of Fashion Design                           | Rs. 35,000-40,000               | Higher employability and students prefer to become entrepreneurs/freelancers  | Freelance Designing Entrepreneurship                         | Most of the students are entrepreneurs. They go into either designing or become freelancers in various aspects of the industry. |
| 6     | Bachelor of Science in Leather Technology            | Rs. 30,000-40,000 (anticipated) | This is the first batch graduating soon. Hopefully will go into leather industry with large manufacturers and brands. | Designing Entrepreneurship                                   | Most of the students prefer to be entrepreneurs. They will go into either designing or preferably will become freelancers       |

TABLE 57: POST SUCCESSFUL COURSE COMPLETION

**5.2.6** It emerged from the interview of respondents that Fashion design is more in demand among students. Almost 50% of students are enrolled in fashion design and the employment rate for graduating students in this program was a 100% in the previous year. This is followed by the Diploma of Associate Engineering (3 years course) and one year diplomas for which almost 27% (combined percentage) students are enrolled and employment rate for graduating students was also 100%. The students looking for a career in footwear designing are either employed through events (job fairs etc.), some of them go on to run their own business ventures or become freelancer designers.

**5.2.7** Furthermore it has emerged from the survey that graduates gravitate towards big brand names and large organizations. The reason behind this is job security and a confirmed route towards promotion and a properly defined career path.

### COURSE SELECTION CRITERIA

**5.2.8** TSP representatives were asked about criteria that they used for decisions regarding course selection. Topics covered included such criteria as:

- Selection committee,

- Written policy,
- Selection criteria,
- Opinions of industry experts,
- Requests from industry and
- Checking updates for contemporary courses being offered internationally

### SELECTION PROCESS

**5.2.9** It emerged that TEVTA plays an important role in the selection of trades to provide courses for, designing of curriculum, setting up a fee structure, duration and financial requirements of the courses or trades to offer. Other influencing stakeholders include industry and education experts as well as chambers of commerce and industry.

**5.2.10** Industry requirements within a certain cluster also influence this decision. For example, the footwear cluster of Multan consists mostly of “Khussa / Kolha Poori Chapal” manufacturers. The training and course selection requirement for the Multan area will be different from that of Lahore where the Footwear sector is more organized and involved in manufacturing of high quality shoes and formal wear.

**5.2.11** Overall opinions shared with the consultants showed a lack of, or limited participation of, any central committee for the selection of trades or courses within the government sector. In the views of our respondents, this was identified as the key factor that has led to a lack of harmony in courses across the sector. At a government level, this type of decision making is fragmented and distributed across various bodies. For most Government and private institutes TEVTA is responsible for the selection of trades and courses in Punjab, while in Charsadda, the Technical Board, Peshawar is the body responsible.

**5.2.12** However in the private sector institutes, the courses, technology and trades selection are done mostly through their foreign collaborations and specialists. Their foreign affiliates provide support in curriculum review each year. Details of affiliations are given in this chapter of the report.

### **COURSE DESIGN/DEVELOPMENT**

**5.2.13** Regular conduct of surveys with public/private organizations and associations, industry expert opinions/requests on introduction of new courses were reported by the TSPs, to be gaining prominence and usage in determining the trades and courses to be offered in the institutions. Gathering opinions from industry, education experts and chambers of commerce and industry, were reported by the TSPs as a continuous process for the selection of courses and trades. TDAP was also referred to as an organization that often raises requests for courses and trades.

**5.2.14** Majority of the TSPs (PIFD, UMT School of Textile and Design, BATA and GILT) expressed their openness and willingness to introduce and design new courses and regular updates on content and curriculum. Few however, were really active in this regard. Some TSPs also arranged and conducted international fact finding trips for their lecturers while selecting new courses.

### **COURSE SELECTION CRITERIA**

**5.2.15** Standards set by Higher Education Commission for course selection are mostly used as a point of reference for course and trade selection in the Government (more firmly follow) and private (follow in conjunction with overseas standards) universities. Criteria and standards set by the European markets were also mentioned as a benchmark for the selection of courses for the sector. For e.g. the Pakistan Institute of Fashion and Design is always looking to introduce new content that is available overseas. The main goal is to match the criteria and standards set by the European market. For this purpose they are sending their prospective students for special fashion and design trainings in Milan. Prospective students get scholarships for these trainings and they are asked to come back and serve the institute either as teachers/ trainers or curricula developers for at least 2 years post visit.

### **DEVELOPMENT OF CURRICULA AND COURSE CONTENT**

### **STEPS IN CURRICULUM DEVELOPMENT**

**5.2.16** The TSPs (PIFD, GILT and UMT) report that the key steps followed during development of curricula and course content are;

- Objectives of curriculum,
- Industry experts' participation,
- Participation of authorities to design, review and finalize the curriculum,
- Frequency of reviewing the curricula design,
- Uniformity of course content and matching the requirements of the job market.

### **OBJECTIVES OF CURRICULUM**

**5.2.17** Almost all respondents are of view that it is of great importance that curriculum design objectives are identified before development of the curriculum for any trade/program. They agree that curriculum objectives should meet the requirements of the industry. The TSPs are also of view that it is essential to conduct a comprehensive study of industry requirements and skills gaps identification before designing the curriculum for any particular trade.

### **TEACHER DEVELOPMENT AND PEDAGOGIES**

**5.2.18** Parallel to curriculum development/design the respondents also suggested that it would be beneficial if trainings for the teachers/trainers could be organized and delivered on priority basis. They are also of view that there is a teacher capacity gap at the TSP level. Even if TSPs start offering courses, they would not have the teachers to teach the courses. The respondent recommended this as another actionable area for PSDF. Majority of the respondents pointed out design engineering courses, advanced IT CAD/CAM and Lab inspection and testing courses, where PSDF can support TSPs by building capacity.

### **INDUSTRY EXPERTS PARTICIPATION**

**5.2.19** The respondents indicated a strong need for the involvement of industry and education experts during curriculum design and development. It was mentioned that sometimes the ministry of commerce and industry is also engaged in identifying the requirements of curriculum development. Some respondent TSPs revealed the presence of a proper panel in their institution for reviewing the requirements of the industry. These panels include representatives (7-8) from chambers of commerce and industry, PFMA, several ministries, PCSIR and off course the industry and education experts. The process involves conducting proper survey/interviews from industry and education experts, identifying the skills gaps and bringing the recommendations for designing the course.

### **COURSE DESIGN REVIEW**

**5.2.20** While discussing the frequency of reviewing

course content after development, the responses varied from 1-3 years, depending upon the needs and requirements of the industry and technology changes if any.

**5.2.21** The study also revealed that government institutes strictly develop curriculum according to the standards set by HEC. There is a proper board (Punjab Board, TEVTA, etc.) and academic council which studies and reviews the criteria set by the HEC which is supposed to be strictly followed by the government institutes.

### **ENSURING UNIFORMITY**

**5.2.22** It emerged during the survey that the curriculum (at diploma and degree level) across the institutes in Punjab is not uniform. It is far more dependent upon the requirements of the local industry and the demand of students (private institutes take regular feedback from students on course and its content). As product categories and types vary greatly along geographic lines, so do course contents in TSPs in those regions. This variation in the course content is prevalent across all Punjab while in Khyber Pakhtunkhwa the course content is reported to be more uniform.

### **TSP'S & INDUSTRY CORRELATION**

**5.2.23** The TSPs as a whole expressed a positive correlation between course content and post-graduation employment. The respondents from Khyber Pakhtunkhwa especially mentioned three curricula that had strong employability rates: cutting, stitching and lasting.

**5.2.24** All the institutions that we surveyed were of the opinion that there were gaps between the curriculum taught and the requirements of the industry. The following gaps emerged from the responses we gathered during the interviews;

- Difference in the techniques taught and techniques actually used in the industry. This was attributed to the lack of due availability of latest machinery/technology within TSPs.
- Lack of up-to-date training material and its detailed delivery due to high costs specially in leather/footwear technology so majority of the institutions only providing general overview to students.
- Lack of updated technological knowledge in resources to TSPs that impede in their ability to restructure their curriculum as per industry requirements.

### **5.3 AFFILIATIONS/PARTNERSHIPS**

**5.3.1** Survey results indicate that almost every TSP has some sort of local affiliations/partnerships with Government /Public bodies and/or associations and private organizations. Additionally, institutes have also in place partnerships with industry representatives. As depicted above institutes like UMT and Pakistan institute of Fashion and Design have acquired international affiliations for different trades/sectors but none of the institutes have

any international affiliations in footwear courses and trainings. Pakistan Institute of Fashion and design and UMT have some international affiliations but these affiliations are for other sectors in which they are providing courses. When we asked respondents if they have any plans for international affiliations in the near future, apart from the UMT and Pakistan Institute of Fashion and design, all the other respondents' reply to the question was negative. Respondents pointed out constraints like cost and effort of acquiring these affiliations, strict short listing criteria set by international institutes, existing low capacities of local institutes including technical and operational capacities, teachers capacity etc. The table below depicts the current local and international affiliations of survey respondents (includes affiliations for all the sectors for which they are providing services).





| PARTNERSHIPS/AFFILIATIONS                           |         |       |         |  |  |  |   |  |         |
|---|---------|-------|---------|--|--|--|---|--|---------|
| Government Institute of Leather & Technology (GILT) |         | BATA  |         | Pakistan Institute of Fashion & Design (PIFD)  |  | UMT School of Textile & Design   |   | Footwear Training Institute Charsadda (FTIC) |         |
| Local   | Foreign | Local | Foreign | Local  | Foreign  | Local  | Foreign   | Local  | Foreign |
| Numerous part-nerships within the industry          | None    | None  | None    | <ul style="list-style-type: none"><li>• Pakistan Leather Garment Manufacturers &amp; Exporters Association (PLGMEA)</li><li>• Ministry of Commerce</li><li>• Ministry of Industries</li><li>• SMEDA</li><li>• PIDC</li><li>• Aik Hunar Aik Nagar (AHAN)</li><li>• Pakistan Fashion Design Council</li><li>• Fashion Central Pakistan</li><li>• Pakistan Gloves Manufac-turing Association (PGMA)</li><li>• USAID</li><li>• GTZ</li><li>• PCSIR</li></ul> | <ul style="list-style-type: none"><li>• Bucks University</li><li>• Modepelle</li><li>• Mod'Spe</li><li>• Konstfack University</li><li>• Aalto University</li><li>• University of Boras</li><li>• Ecole de la chambre</li><li>• AIGS</li><li>• London College of Fashion</li><li>• ARS Sutoria, Milan</li><li>• FIT New York</li><li>• IIGJ</li></ul> | <ul style="list-style-type: none"><li>• Adamjee Insurance Co.</li><li>• American Express</li><li>• Hewlett Packard</li><li>• High noon Laboratories</li><li>• Honda Atlas</li><li>• ICI Pakistan</li><li>• Indus Bank</li><li>• Integrated Management Consultants</li><li>• Industry Management Consultants</li><li>• Institute of Management &amp; Research</li><li>• National Logistic Cell</li><li>• NAVTTC</li><li>• TEVTA</li></ul> | <ul style="list-style-type: none"><li>• Near East Uni-versity</li><li>• Marmara Univer-sity, Turkey</li><li>• Meliksah Univer-si-ty, Turkey</li><li>• Faith University, Turkey</li><li>• Eastern Michigan University</li><li>• University of Bed-fordshire, UK</li><li>• South West Uni-versity of Finance &amp; Economics, China</li></ul> | Trade Testing Board                          | None    |

TABLE 58: PARTNERSHIPS/AFFILIATIONS

TABLE 58: PARTNERSHIPS/AFFILIATIONS

## 5.4 ACCREDITATION

**5.4.1** Similar to the affiliations, survey results indicate that none of the institutes, be they of the public or the private sector, have any sort of international accreditation with foreign accredited bodies. Local accreditations are observed. The Institute of Leather and Technology is accredited with Punjab Technical Board and UMT with Pakistan Engineering Council, National Business Education Accreditation Council, National Computing Education Accreditation Council and Association of Management Development Institutions in Pakistan. All the other public level institutes are providing their own certificates and TEVTA is itself an accredited body.

**5.4.2** When asked if the respondents had any plans for acquiring international accreditations in the future, apart from the UMT and Pakistan Institute of Fashion and design, all the other respondents' reply to the question was negative. The table below depicts the current accreditation status of survey respondents.

| ACCREDITATION                                       |         |       |         |   |         |   |  |  |         |
|---|---------|-------|---------|---|---------|---|--|--|---------|
| Government Institute of Leather & Technology (GILT) |         | BATA  |         | Pakistan Institute of Fashion & Design (PIFD) |         | UMT-School of Textile & Design  |  | Footwear Training Institute Charsadda (FTIC) |         |
| Local   | Foreign | Local | Foreign | Local   | Foreign | Local   | Foreign  | Local  | Foreign |
| Punjab Technical Board                              | None    | N/A   | N/A     | N/A   | N/A     | <ul style="list-style-type: none"> <li>Pakistan Engineering Council</li> <li>National Business Education Accreditation Council</li> <li>National Computing Education Accreditation Council</li> <li>Association of Management Development Institutions in Pakistan</li> </ul> | <ul style="list-style-type: none"> <li>South Asian Quality Assurance System</li> <li>Asia Pacific Quality Network</li> <li>The Association of Advanced College Institutions of Business</li> <li>Association of Management Development Institutions in South Asia</li> <li>European Foundation for Management Development</li> </ul> | N/A  | N/A     |

TABLE 59: ACCREDITATION

## 5.5 INTERNATIONAL CERTIFICATION

**5.5.1** The list mentioned below represents the world wide acclaimed certifications in relation to footwear industry:

- South Asian Quality Assurance System
- Asia Pacific Quality Network
- SATRA Technology
- Intertek
- International Organization for Standardization
- International Accreditation Organization

**5.5.2** It is very interesting to note that, apart from the UMT Institute which is certified with South Asian Quality Assurance System and Asia Pacific Quality Network, none of the other institutes are certified. Upon inquiring whether they were planning to acquire such certifications

in the future or whether they believe there is need for such certifications; almost all the TSPs were of view that they want to get certified lack the resources, time and finances to do so.

## 5.6 RECRUITMENT OF TRAINING STAFF

**5.6.1** Respondents reported that the selection and recruitment of teaching staff, in both the public and private sector TSPs (awarding degrees for footwear sector related programs), is carried out by a management committee which includes the vice chancellor, director general and senior professors along with industry experts who are involved in the selection process. As this process is governed by HEC, the criteria laid out by the HEC are followed:

**5.6.2** The selection committee is setup depending upon the need and nature of the position in question, as and when need arises technical experts from the industry are invited to join the panel.

**5.6.3** The selection process usually starts off by placing an advertisement in the newspaper, which is followed by a series of interviews, presentations and screening tests so that the committee can have a better understanding of the skill set of the candidate in question.

**5.6.4** TEVTA has a separate R&D department which extensively studies competitors to not only design their curriculum but also to set out the criteria to hire the best possible instructors. TEVTA furthermore employs a policy of pedagogy (teaching on how to teach). This strategy is used to train newly hired trainers so that they are more proficient in their work. Before they begin training, the teachers are given an overview of the curriculum; this process gives a better understanding to the instructor as to what is required out of them and how to deliver the content to the students in a more structured manner.

**5.6.5** Some of the institutions also focus on training and development of their instructors so that the skill sets of their instructors are developed with changing times and requirements of the industry. For example UMT (School of textile and design) conducts training sessions on a yearly basis for their general staff and instructors by facilitating and encouraging them to participate in seminars and conferences, in house and off site training programs are also conducted depending upon the requirement. TEVTA is actively involved in involving experts from the industry to teach and review their instructors.

**5.6.6** The importance of teacher’s capacity enhancement was overwhelmingly highlighted by most of the respondents. However, scarcity of financial resources was identified while discussing the practical nature of capacity building implementation plans; which requires the purchasing of machinery or equipment. The aforementioned financial constraints were also mentioned while discussing the availability of contemporary teaching and learning material. These constraints result in majority of the TSPs having teachers which are not up to par with industry standards.

**PAY STRUCTURE**

**5.6.7** The general trend observed across all institutions is that pay scales are determined on the basis of seniority, experience and qualification of the instructor. UMT (School of textile and design) & PIFD has a mapped out career development path for their teaching staff, where performance reviews are conducted annually through peer reviews and students. Based on the reviews and length of service instructors are promoted to the next cadre. UMT also encourages its staff to pursue higher level degree programs i.e. PHD or MS by providing it free of cost and upon completion instructors’ pay scale and cadre is increased. Despite the aforementioned promotional opportunities, when respondents were asked to compare the promotion avenues for teachers of TVET with non TVET, they responded unfavorable promotional avenues for TVET teachers.

| Institutes                                   | Satisfied with Existing Infrastructure/Facilities | Current Source of Funding | Planning for Expansion | Exploring options for expansions        |
|--|---|---------------------------|------------------------|---|
| Government Institute of Leather & Technology | YES   | Government of Punjab      | YES                    | YES-Depending on the terms of agreement |
| TEVTA  | NO  | Government of Punjab      | YES                    | YES                                     |
| Pakistan Institute of Fashion & Design       | NO  | Govt. and Own Funding     | NO                     | NO                                      |
| UMT - School of Textile & Design             | NO  | Private and in-house      | YES                    | YES                                     |
| Footwear Training Institute Charsadda        | NO  | Export Development Fund   | Don't Know             | NO                                      |

TABLE 60: PLANS FOR EXPANSION

**5.7 POST TRAINING FACILITIES/PLACEMENTS**

**5.7.1** The survey results indicate that institutes (excluding Footwear Institute Charsadda and TEVTA) provide post training facilities to their students. UMT, Government Institute of Leather and Technology and Pakistan Institute of Fashion and Design have placement offices that are solely dedicated to bridging the gap between the students and the employers in the industry for the purposes of placements. This is mostly done by providing internship opportunities to their students. The placement department also ensures active participation of their students and graduates in job fairs and job expos where students are exposed to a larger set of employment opportunities. However, in terms of benefits to students, it is the design course graduates that receive the most benefit from these activities.

**5.7.2** UMT also has an active alumni portal that enables students and graduates to connect and share their experiences and explore job opportunities. The Government Institute of Leather and Technology (GILT) have a department solely dedicated towards employer engagement and industry relation activities.

**5.7.3** UMT, GILT keep and maintain records of students graduated from their institutes, while PIFD keeps an informal record as they have no proper / formal process to track students. It is very interesting to note, as evidenced by the respondent from GILT, that GILT’s employability ratio in the past 5 years has been between 65%-70%<sup>36</sup>, which is impressive, and 70% of their graduates are currently active trainers. Survey results also indicate that none of the passed out footwear students of PIFD and UMT became full time trainers and the employability rates for these institutes are around 50-55% and 65-70% respectively.

**5.8 PLANS FOR EXPANSION**

**5.8.1** The table below depicts the overall situation on Footwear TSPs’ plans for expansion:

**5.8.2** Majority of the TSPs were not satisfied with their existing infrastructure/facilities. UMT and Pakistan Institute of Fashion and Design are currently reviewing budgets for expansion of buildings and labs. The Footwear Institute Charsadda requires building/premises improvements. TEVTA’s opinion is that immediate efforts are required by its senior management to obtain funds from external sources for planned technological and infrastructure expansions in the institutes.

**5.8.3** Almost all the institutes are funded by provincial government while UMT’s complete funding is private and self-generated. Furthermore all the surveyed institutes are planning expansions, with the exception of the Pakistan Institute of Fashion and Design. They reported being dependent on Government funding which is not enough for expansion.

**5.8.4** UMT is planning to introduce an MS program in design, covering textile and footwear in 2014. The government institute of Leather and Technology is planning to introduce quality control courses in both footwear and leather technology and is also planning to increase the number of seats due to high course demand. Currently 30 seats are available for this course and registrations far exceed this number. They are also planning to open a state of the art ‘Center of Excellence’ for Leather Technology. Likewise, the Footwear Institute, Charsadda, is planning to create a Leather Village in Charsadda and have plans in place to make this initiative self-sustaining.

**5.9 AWARENESS OF PSDF**

**5.9.1** Out of the five TSPs surveyed for the purpose of this study, 4 TSPs reported knowledge about PSDF, its role, mission and responsibilities. The UMT institute also pointed out that they have worked with PSDF in past and it was good experience for them. Almost all the TSPs were of view that PSDF has taken some really good initiatives and have launched pertinent schemes for various labor intensive sectors of Punjab including footwear sector. Also only 2 TSPs have heard about PSDF’s model of funding.

**5.9.2** However, the respondent from TEVTA pointed out that there is still lot of work that needs to be done on an immediate basis for the continued development of sector in terms of strengthening of human resource and PSDF can play a vital role here through continued engagement with the government sector.

**5.9.3** The table mentioned below also depicts the opinion of respondents on how PSDF can help their institution and industry. Majority of the players replied that PSDF can play a vital role in developing and enhancing the skills of their teachers. PSDF can also assist in the selection and development of latest curricula<sup>37</sup>.



<sup>36</sup> DATA RETRIEVED FROM: IN DEPTH INTERVIEW WITH REPRESENTATIVE FROM GILT

<sup>37</sup> ONE OF THE RESPONDENTS (PAKISTAN INSTITUTE OF FASHION AND DESIGN), MENTIONED THAT PSDF COULD HELP TSPS IN CREATING SOME SORT OF ‘TESTING MECHANISM’ THAT THEY COULD USE AS AN ‘ASSESSMENT FOR GRANTING’ THE SCHOLARSHIPS/GRANTS TO PROSPECTIVE STUDENTS.



| Organizations  | Knowledge about PSDF | How PSDF can help your organization   | Awareness about PSDF Model of funding | Suggestions for PSDF  |
|--|----------------------|---|---------------------------------------|---|
| <b>Government Institute of Leather &amp; Technology (GILT)</b> | Yes                  | <ul style="list-style-type: none"> <li>• Selection of latest curricula and their development</li> <li>• Can provide financial assistance in enhancing the equipment and training capacities</li> <li>• Future skills demand of teachers</li> </ul>  | No                                    | PSDF should visit the Government, TEVTA and other institutes and take a look at the available facilities.   |
| <b>TEVTA</b>   | Yes                  | <ul style="list-style-type: none"> <li>• Should visit the Government institutes, TEVTA and other institutes regularly and keep an eye on betterment of available facilities in these institutes</li> <li>• Can initiate some courses, incentives and new technologies in the sector together for huge prospects</li> </ul>        | Yes                                   | PSDF should visit the government, TEVTA and other institutes and take a look at the available facilities  |
| <b>Pakistan Institute of Fashion &amp; Design (PIFD)</b>       | Yes                  | <ul style="list-style-type: none"> <li>• Future skills demand of teachers</li> <li>• Selection of latest curricula</li> <li>• Creation of some sort of 'testing mechanism' that could be used as an 'assessment for granting' the scholarships/grants to prospective students</li> </ul>  | No                                    | PSDF should take steps to convince the industry or devise the strategy through which industry should offer 3 months internships on a regular basis. |
| <b>UMT-School of Textile &amp; Design</b>                      | Yes                  | <ul style="list-style-type: none"> <li>• Can help in acquiring International affiliations and certifications by providing help in fulfilling complex criteria of certificates providers</li> <li>• Selection of latest curricula</li> <li>• Enhancing skills levels of teachers with respect to current industry needs</li> </ul> | No                                    | There is still a lot of work to be done mainly in the technological aspects of the industry and PSDF should take some prompt steps for them         |
| <b>Footwear Training Institute Charsadda (FTIC)</b>            | No                   | <ul style="list-style-type: none"> <li>• Organizing trainings/workshops on latest trends and technologies in footwear industry</li> </ul>   | Yes                                   | -   |

TABLE 61: AWARENESS OF PSDF

## 6 DETAILED FINDINGS – SECTOR EXPERTS

## 6.1 INTRODUCTION

**6.1.1** As part of the review of the skills training needs within the footwear sector, we conducted interviews of business experts across Punjab. This chapter provides insight on the views of these sector experts regarding, skill needs, skill gaps, their feedback on relevance and quality of courses, effectiveness of Training Service Providers (TSPs) etc. This chapter also provides the viewpoint of experts on the global footwear scenario, current consumer demand in the international market, and major challenges being faced by the sector.

## 6.2 GLOBAL FOOTWEAR INDUSTRY

**6.2.1** According to most of the respondents, the global industry is dominated by the Chinese manufacturers catering to all kinds of footwear products from high end to cheap footwear. Some respondents also gave the reference of a report compiled by the Portuguese footwear association on the global footwear industry, which stated that as of 2013 in terms of the distribution of footwear production by content, China has the largest share globally which is 60% followed by India 10% and Brazil 4%.

**6.2.2** The respondents further reported that there has been a shift in the international market from leather to non-leather based shoes, which means that every year the demand for textile and synthetic shoes is increasing. The respondents indicated that due to this shift they predicted that the demand for Pakistani shoes, which comprise mainly of leather, may decrease.

**6.2.3** Currently China and India are the major players globally. China is the main manufacturing hub mainly because most European and American manufacturers have opened their factories in these countries attracted by lower costs of production. Their governments have also played a major role in training and educating the industry participants and supporting them in attracting foreign brands to open manufacturing establishments.

**6.2.4** India is gaining momentum over China slowly, due to the fact that skilled labor in China is becoming more expensive. According to most of the respondents in the formal sector (Style Shoes, Servis, EPCOT, Firhaz Footwear and Siddiq leather), in the next 5 years, there will be a shift of major manufacturing hubs from China to countries like India, Thailand, and Bangladesh. They felt that the target was to have 50% of the production units in China and 50% across the globe.

**6.2.5** This trend in shifting industrial units towards lower labor costs destinations may be viewed as a potential opportunity for Pakistan. The respondents were apprehensive that Pakistan may not be able to explore and exploit these opportunities because of factors like lack of infrastructure, lack of good governance sector wide, law and order/energy crises; lack of skilled labor, infrastructure facilities, high taxes which results in diluting the pricing advantage and currency devaluation, to name a few.

**6.2.6** Other factors that respondents felt were negatively impacting Pakistan's ability to compete globally included the inability of local manufacturers to adapt to and meet shifting demands and trends globally, a lack of brand recognition of Pakistani shoes etc.

**6.2.7** In terms of materials, China is expected to give tough competition to the global footwear industry in the synthetic materials market, as they have made tremendous amounts of investment in this sector that places them in a favorable position to exploit the shift in footwear demand towards synthetics. In the coming years, sports, canvas, synthetics and rubber footwear are expected to be more in demand globally compared to traditional footwear.

**6.2.8** Majority of the respondents are also of the view that the 'Key to Success' in the global market is to continuously offer better and bolder product lines, undertake new product development, introduce mechanized production techniques and strive for waste minimization. The footwear industry should also focus on safety and environmental issues like avoiding use of resins and chrome which are classified as cancer causing agents. They hold the view that a firm's success will depend greatly upon strict implementation of ISO and safety implementation standards making them more attractive towards international buyers. Branding and retailing can also play a significant role in expanding the market and make use of the available opportunities. Companies that can focus upon and deliver keeping these aspects in mind are likely to thrive locally and internationally.

## 6.3 PAKISTAN FOOTWEAR INDUSTRY

**6.3.1** Over the years Pakistan's Footwear industry has come a long way and is beginning to gear up to compete in the international market. Major industry players are focused on taking advantage of rising labor cost in China and also benefiting from the recent grant of GSP plus status to Pakistan which has opened the doors to European markets. It is believed that Pakistani leather is of the finest quality in the world and firms are geared to make use of this comparative advantage to compete internationally. Modern machinery is being imported to automate the production process and increase efficiency.

**6.3.2** However, Footwear industry still faces many challenges in Pakistan. Most of the problems faced are attributed to social and economic crisis in the country. The current energy crisis, for example, does not allow the firms to operate at full capacity, which impedes in achieving production targets. Another challenge faced by the industry is lack of skilled manpower especially in the stitching department where most of production bottlenecks are reported. Cottage firms, which form 70% of the total footwear manufacturing in Pakistan and accounts for above 60-65% of the local demand, is sorely lagging behind in technology and skilled manpower. Lack of technological advancements and process and quality initiatives in the sector are also contributing to the inability of the firms to

meet international standards.

**6.3.3** Leather and footwear industries of Pakistan ranked 15th and 36th respectively in terms of production capacity across the globe and Leather industry is the largest contributor towards GDP after agriculture and textile<sup>38</sup>. However, the respondents felt this sector was generally neglected by the government. Contributing factors include improper implementation of ISO 9000 and ISO 14000 quality standards, due to which the local manufacturers are unable to meet international requirements. Child labor is also another issue faced by the sector which hampers exports.

**6.3.4** The respondents felt that the government needs to impose proper checks and balances to ensure effectiveness and efficiency across the sector. We found that almost all respondents covered, except for Servis, stated that the lack of technological advancements is the main reason why Pakistan is lagging behind in competing internationally, coupled with the fact that there aren't any support industries (semi-finished goods industry). It was however felt that the local footwear manufacturers are very resilient and are able to keep off the competition coming in from China and Thailand. This does not include only Bata and Servis but also manufacturers of generics. The retail network of Servis and Bata is very strong but the larger chunk comprises of small players who cater to local markets.

**6.3.5** In addition to the above, Pakistan has the highest sales tax ratio as compared to other neighboring countries. The respondents felt that this does not enable the sector to capture international markets through a pricing advantage. Similarly, the government does not provide grants or tax subsidies or other relief to this sector resulting in higher Cost of Production (COP) offsetting other labor advantages.

**6.3.6** The sector appears to be modernizing its production processes according to the respondents covered. Recently there has been an influx of advanced technological equipment but, the respondents added, the industry has not been able to utilize it to its full capacity due to shortage of skilled labor. The biggest challenge hence remains building capacity to provide the sector with trained and skilled manpower. The respondents felt that the gap between what is required (in terms of skill sets) and what is available is too wide in terms of both quantity and quality. For example the institute in Gujranwala only produces 15-20 trained people per batch which is insufficient for the entire industry. Bata and Servis alone are not able to cater to the larger chunk of the industry especially the cottage industry.

**6.3.7** The main points of concern about the skill gap are reported to be in the supervisory level, mechanical workers, technicians and machine operators. The use of CAD/CAM and other software (Shoe Master etc.) is expected by our respondents to increase dramatically in the coming years, so measures need to be taken to train people at this stage. This is further supported by the results of the quantitative survey where it has been seen that there will be an increase in demand for Advanced CAD/CAM, foot-

wear designing skills, pattern making skills, and soft skills (like communication, work ethics and numeracy) in coming years<sup>39</sup>. Furthermore, according to most of the qualitative survey respondents; development of the industry is taking place at a faster pace than the development of skilled labor, also footwear industry especially footwear manufacturing is no longer appealing to young educated professionals/students and they are turning away from manufacturing sector in favor of high tech industries and service sector. Therefore the top tier of the industry needs to collaborate with institutions to bridge the gap.

**6.3.8** The respondents also expressed the view that the major threats which the industry might face in the next 5 years will be lack of skilled labor due to inability of the sector in providing the required skill set. China is also seen as the major threat as far as synthetic footwear is concerned. Rapid change in consumer demand requires continuous development of the product along with branding, currently the footwear sector in Pakistan is not concentrating on branding its products which is an area they need to explore given that consumer dynamics are changing rapidly and branding of a product creates customer association with the product.

**6.3.9** Currently the major players have to import raw materials from European countries because supporting industries (semi-finished goods industries) are not present result in higher COP. It was felt that the development of support industries is vital for the sustainability of the sector. Further, strict quality control measures need to come in place so that international standards can be met.

## 6.4 SHOE MAKING PROCESS – ASSESSMENT OF SKILLS REQUIREMENT AND SKILLS GAPS

**6.4.1** The respondents reported that manufacturing in the footwear industry involves the use of a range of manual processes apart from and in addition to, semi-automated and fully automated equipment. A large number of operations are required for making a pair of shoes. The common stages in shoe making process are; designing, cutting, stitching, closing and finishing. Almost all the respondents under study were of the view that there are skill shortages at each and every step of shoe making process and this shortage is expected to rise in the next five years. The specific functions where there are skill shortages as reported by our respondents are summarized as follows:



<sup>38</sup> DATA RETRIEVED FROM: [HTTP://WWW.DAWN.COM/NEWS/594746/LEATHER-INDUSTRY-FACING-SKILLED-MANPOWER-CRUNCH](http://www.dawn.com/news/594746/leather-industry-facing-skilled-manpower-crunch).

<sup>39</sup> SEE CHAPTER 4, SECTION 4.5.6, FIGURE 26.



| Skills Required                              | Skills Gap   |
|--|--|
| Shoe Designing                               | <ul style="list-style-type: none"> <li>Acute shortage due to high industry demand and low supply of good designers</li> <li>Lack of foreign qualified professional shoe designers to teach the subject (both at institute and organization)</li> <li>Lack of local qualified shoe designers to teach the subject (both at institute and organization)</li> <li>Fashions designers taking up footwear designing as a career due to high demand / high salary being offered</li> <li>Unavailability of creative designers with the ability to create own designs instead of copying /modifying</li> <li>Inability to create trendy designs which are easier to produce and are cost effective</li> <li>Lack of knowledge about shoe anatomy, hence unable to produce proper designs</li> <li>Lack of workshops where the designers can get hands on experience on shoe designing</li> <li>Lack of knowledge of latest fashion trends</li> <li>Lack of knowledge/inability to use of latest software on footwear designing</li> <li>Unavailability of a well-designed course covering every aspect of shoe designing</li> <li>Aging karigars/Ustaad- skills have not been passed on to family/shagirds</li> </ul> |
| Pattern making                               | <ul style="list-style-type: none"> <li>Inability to convert designs on paper</li> <li>Inability to creates patterns of various sizes</li> <li>Lack of knowledge about shoe anatomy and shoe sizes hence unable to make proper patterns with respect to size</li> <li>Lack of knowledge/ability to use pattern making software</li> </ul>   |
| Cutting                                      | <ul style="list-style-type: none"> <li>Lack of knowledge of handling various tools/ machine/ equipment used for cutting</li> <li>Lack of knowledge of latest technologies used in the cutting department (bulk cutting, laser cutting etc.)</li> <li>Lack of knowledge on how to go about cutting process causing minimum wastage of material</li> <li>Inability to follow design , match patterns ( printed, embossed material) to cut identical pair of shoes</li> <li>Lack of training staff in the footwear industry itself to train the new hires</li> <li>Lack of training institutes</li> <li>Lack of practical training at the institutes/hands on exposure to a variety of material and cutting tools</li> </ul>  |
| Stitching /Upper Stitching/ Closing          | <ul style="list-style-type: none"> <li>Inability to stitch neatly with minimum errors/wastage of material</li> <li>Inability to match colors (matching threads color with material)</li> <li>Lack of training staff in the footwear industry itself to train the new hires</li> <li>Lack of training institutes</li> <li>Lack of practical training at the institutes /hand on exposure to a variety of stitching methods (hand stitching, machine stitching , use of various size and type of needles based on the type of stitching required and material in use)</li> </ul>   |
| Sole Making                                  | <ul style="list-style-type: none"> <li>Lack of knowledge of various techniques used in sole making</li> <li>Lack of expertise in cutting soles by hand/cutting machines /equipment etc.</li> <li>Inefficiency in handling sole cutting equipment/machines causing wastage</li> <li>Lack of knowledge of operating automated sole making machines (Injection molding machines etc.)</li> </ul>  |
| Last /Lasting                                | <ul style="list-style-type: none"> <li>Lack of knowledge of the importance of last/lasting in the shoe making process</li> <li>Lack of training on last making /performing various type of lasting operations using a variety of techniques/ machines</li> <li>Lack of last making units in the industry</li> </ul>  |
| Material management/material handling skills | <ul style="list-style-type: none"> <li>Lack of knowledge about the various materials in use for part of shoes</li> <li>Inefficient material handling skills causing wastage</li> <li>Lack of knowledge about leather/ knowledge gained through long years of experience in the industry</li> </ul>   |
| Molding                                      | <ul style="list-style-type: none"> <li>Lack of knowledge about molding machine operations</li> <li>Lack of technical knowledge of mold making/mold making process</li> <li>Lack of institutes to train workers to work on mold making/molding machines</li> <li>Insufficient knowledge about molding machinery as hire unskilled staff and train them</li> </ul>   |
| Machine Operating Skills                     | <ul style="list-style-type: none"> <li>Lack of knowledge about machine operations</li> <li>Lack of technical knowledge on working of production plants</li> <li>Insufficient knowledge about various sophisticated machinery in use</li> <li>Lack of knowledge of preventive maintenance</li> <li>Inability of machine operators to transfer knowledge to juniors</li> <li>Lack of knowledge of minor machine maintenance</li> </ul>   |
| Technical Skills                             | <ul style="list-style-type: none"> <li>Ability to manage all technical aspects of shoe production process</li> <li>Lack of knowledge leather processing</li> </ul>   |
| General Knowledge about shoe making process  | <ul style="list-style-type: none"> <li>Lack of knowledge of complete shoe making process, how each step can be performed by using various techniques, latest technology in use, computer applications in use etc.</li> </ul>   |

TABLE 62: SKILLS GAP

**6.4.2** Almost all the respondents contacted for the study highlighted training, both at formal and informal level as the cause of the skill-gaps at various levels. Due to a lack of training institutes/ courses almost all the players in the market depend on ‘on-the-job/in-house training’. They mostly hire unskilled workers and train them. They were of the view that both the industry and training institutes, if working in close relationship with each other can play a vital role in bridging the gap. The suggestions made for both the industry as well as the TVET’s are as follows:

| Technical Vocational Education Institute   | Footwear Industry  |
|--|--|
| Need for more footwear related training institutes in the vicinity/cluster of footwear manufacturing units | Develop in-housetraining facility  |
| Need to introduce footwear related trades in other TVET’s not offering footwear specific courses           | Introduce short courses on specific trades and impart theoretical knowledge as well  |
| Foster relationships with allied industry (mold making, last making, sole making)                          | Teacher and student exchange program- following same curriculum /module  |
| Introduce short courses on specific trades with more emphasis on practical training                        | Enhance the perception of footwear industry amongst the youngsters by visiting the educational institutes/ TVETs, organizing students visits to the manufacturing units, career counseling, offering internships, student placement etc. |
| Introduce higher level of education so a student can obtain a diploma/degree specific to footwear sector   |  |
| Teacher and student exchange program- following same curriculum /module                                    |  |
| Develop extended curriculum covering all aspects of shoe making  |  |
| Develop curriculum in consultation with the industry experts so as to meet industry demand                 |  |

TABLE 63: TECHNICAL VOCATIONAL EDUCATION INSTITUTE

## 6.5 ON-THE-JOB TRAINING

**6.5.1** All the respondents were of the view that on-the-job training is an integral part of every manufacturing unit in the footwear sector and is an on-going process. The key industry players prefer to hire unskilled workers and train them. A new recruit holding certificates/degrees in footwear specific trades also has to go through the same process as they are not trained to meet the industry’s requirements. Though there is no set curriculum, the training imparted by the larger players in the sector is such that after a few years employees gain sufficient expertise so as to be attractive employees for other players in the market who seek to poach and induct them.

**6.5.2** Few of the respondents also reported that designers and technical staff are hired on a part-time and/or assignment basis and later offered permanent jobs.

**6.5.3** Servis reported that they have European trainers to train their staff. Their senior executives (around 20 in number) frequently attend Exhibitions, seminars, trainings and workshops held abroad to keep themselves abreast with the latest trends in fashion and technology.

**6.5.4** Smaller players in the industry normally acquire unskilled workers, generally with no/low level of qualification and train them according to their needs. Students with higher levels of qualification never approach them for employment, though they can prove to be good sources of training as workers in the small sized manufacturing units are exposed to a range of jobs related to the footwear manufacturing process under the direct supervision of experienced Ustaads/Karigars. Further it is reported by the experts that graduates prefer to move (into the footwear industry) towards big brand names and large organizations rather than the smaller players. The reason behind this is job security and a confirmed route towards promotion and a properly defined career path.

## 6.6 OFF-THE-JOB TRAINING

**6.6.1** Based on their experiences, sector experts are of the opinion that each category of training, either on-the-job or off-the-job (training institutes) have not been able

to fully meet the industry’s skill requirements and the gap is widening with the passage of time. They feel strongly the need to have theoretical knowledge coupled with practical exposure in order to enhance the level of skills available to this sector.

**6.6.2** In their opinion, the industry itself does not take interest in establishing footwear institutes either due to financial constraints or due to a lack of expertise in running a training institute. On the other hand, the training institutes themselves have neither the proper faculty nor facilities required for practical training (machineries, workshops, labs etc.). Our respondents felt that in order to overcome this gap, stronger and closer collaboration between the industry and education institutes (TVET’S) is required. They believe that if each party plays its proper role they will not only be able to enhance the skill levels manifold but will be able to position the sector as an attractive sector to new talent seeking to enter the job market.

**6.6.3** The experts also identified roles that each party should play to achieve the desired results and these roles are summarized on the following page:



| Role Of Industry                              | Role of TVETs  |
|---|--|
| • Need assessment                             | • Use of teaching facility   |
| • Curricula Development                       | • Corporate Discounts  |
| • Student assessment                          | • Customized Courses at industrial premises                        |
| • Selection and Recruitment of Training Staff | • Visit to factory   |
| • Training of Teaching Staff                  | • Close interaction and involvement with industry at regular basis |
| • Providing Technical Expertise               | • Internships  |
| • Providing Practical Exposure                | • Student Placement  |
| • Visit to factory                            | • Enhancing the image of the Footwear Sector                       |
| • Internships                                 |  |
| • Apprenticeship                              |  |
| • Student Placement                           |  |
| • Enhancing the image of the Footwear Sector  |  |
| • Financial Assistance                        |  |

TABLE 64: ROLE OF INDUSTRY AND TVETs (based on respondents' opinions)

## 6.7 TRAINING AND EDUCATION IN FOOTWEAR SECTOR

**6.7.1** According to the majority of our respondents, there has been a slight or negligible change in the availability of training programs in the footwear sector. The situation has been dormant for quite some time with only a handful of institutes (Pakistan Institute of Fashion Design, Institute of Leather Technology etc.) currently providing specialized training facilities in footwear designing. Out of these, PIFD has designed graduate courses for designers interested in entering this field. However, as many companies concur, even with the availability of programs, the designers produced are few in number as compared to the demand.

**6.7.2** There is a great deal of training required in the technical section of the industry which involves operating machinery; cutting, stitching, molding, as well as a know-how of the chemicals used in the production process. In addition to a technological and mechanical understanding of machine operation, training is also required at the quality control level to assure excellence of the product and procedures. Some respondents propose the development of courses where practical trainings are provided in these areas along with a study of the relevant theoretical background to gear the individual with the required skill set before entering the industry.

**6.7.3** Those who wish to pursue a career in the footwear must have a detailed orientation of the entire shoe making process beginning from the anatomy of the foot to an understanding of the materials being used. For the most part, the companies were in agreement that skills such as designing, stitching, pattern making, and finishing were of utmost importance as there is an incessant demand for these. Moreover, another function highlighted was of grading, which assures quality control. Majority of the companies pushed for the usage of software like Shoe CAD, Shoe Master, and CAD/CAM.

**6.7.4** Although the institutes currently functioning in

Punjab are generating workers who enter the industry with a basic skill set that can be further polished and continue to prove their diligence, the number of graduates is still far below the need that exists to sustain the industry. Moreover, most of the training institutes are situated around Lahore and do not cover the whole of Punjab, so smaller setups in different areas can be opened up catering to that particular region which can then be expanded.

**6.7.5** Majority of the experts agree that the TSPs need a system upgrade whereby the students have applicative learning that improves their practical working skills on the technologies and processes in use today.

**6.7.6** The hiring of employees depends solely upon the organizations, both trained and untrained staff is hired depending upon the nature of the job. Some organizations prefer to hire employees who have had a certain amount of training and hold a certificate or diploma. However, most of the organizations focus only on the skill level or the experience of the employee. A fresh graduate will always be preferred but will only be hired after locking in a few hours of internship at the organization.

**6.7.7** Most of our respondents were unaware as to whether the footwear industry was involved with the TSPs and the development of trainings and curricula. A few respondents believed that the industry was in fact fully engaged with TSPs in the development of curricula of the institutes and collaborates with them by providing them with the required machinery and general TSP capacity enhancement. Panels of trainers from PIFD and GILT Gujranwala have been working together with major industry players to ensure effective trainings.

**6.7.8** The experts unanimously agreed when questioned about the relevancy of the curriculum with the requirements of the job market, stating that even though the material being taught was good theoretically, it did not have any practical application for the students. Therefore, the institutes should design their curriculums in such a manner where in the first year students are imparted the-

oretical knowledge, whereas, in the remaining years training should be practical and applicative in nature. Moreover, the curriculums need to be upgraded so they are more in sync with the current requirements of the market.

**6.7.9** Most of the experts are of the opinion that industry representatives should be actively involved in the hiring of trainers, assessment and examination process. Others were unaware as to how this could be done but they liked the idea and encouraged it. Only a couple of the organizations did not agree with this view.

## 6.8 AWARENESS OF PSDF

**6.8.1** The survey results reveal that 85 percent of the respondents do not have any sort of knowledge of PSDF its role and responsibilities, programs, schemes etc. Out of the remaining 15 percent, 5 percent have only heard of the name and the remaining 10 percent have some awareness of PSDF, either through some sources or through various interactions in the industry. None of the respondents reported ever having received any sort of direct communications from PSDF about their organization's roles and responsibilities in the region. One of the respondents (Global Enterprise) indicated that he had been associated with PFMA (corporate member of PFMA) for the last 10 years but had never heard about PSDF before (either through PFMA or through industry sources). This represents a tremendous opportunity for PSDF to market themselves and engage with the sector, not just at the TSP level but also at the industry level.

**6.8.2** As the majority of the respondents were completely unaware of PSDF's role and responsibilities, our consultants shared information regarding PSDF. This information was generally well received by the respondents and they reverted with the following opinions/suggestions on how PSDF can help the industry;

- Availability of short courses for the students/existing human resource in market is very vital for the industry; PSDF should help industry and especially TSPs in this area. PSDF should help TSPs and big players offering OJTs in design of a long term strategy involving selection of trades in demand and designing of curriculum.
- PSDF should help TSPs in designing course materials/programs that include more of the practical knowledge/experience in addition to theoretical knowledge. A program or course should be divided in ratio of 20% theoretical work and 80% practical work. PSDF should either help TSPs in enhancing their technical capacities or they should help them in building their relationships with key players of industry so that students could get more internship opportunities or could spend more time to perform their tasks inside facility which has proper and up-to-date equipment.
- PSDF can recommend the key players of the industry, based on the complete assessment of their capacity and space availability, to form an off-the-job training institute or formal on-the-job training institutes within their facility. The plan should be long term and should stay in effect for the future despite government policy

changes.

- One of the respondent (Stylo Shoes) was of the view that management and ownership of TVET institutes tend to become bureaucratic and inflexible leading to delays, slow turnaround times and incommunicative. The respondent was of the view that PSDF can also encourage TVET institutes to improve their governance and management styles so as to have a more effective working relationship with them.

## 6.9 GOVERNMENT SECTOR

**6.9.1** Majority of the respondents were of view that Government promises more but delivers less. There are associations like PFMA, TDAP, Pakistan Tanners Association etc. working actively for the growth and development of the sector. These organizations are working hard and suggesting continuous improvement options to the higher authorities in Government but they do not always get positive and timely response from higher officials which creates unwanted delays in progress and development of projects and delivery of incentives to this sector. The respondents also believe that the export sector is suffering because of low product knowledge and huge corruption involved at Government level in exports.

**6.9.2** However contrary to this there is an opposite view, which states that companies approach the Government independently for their issues for example rebates or unique personal incentives, rather than being the representatives of the entire industry, hence the demand or request put forward usually favors one firm. Therefore the responsibility lies with the industry representatives and the Government to work in collaboration so that better policy and procedures can be put in place and sector specific initiatives can be taken.

**6.9.3** Few of the respondents also pointed out that the Government recently started refinancing factories to some extent by providing 3% extra rebates on exports and production targets. But the process is too slow and the industry is not getting the rebates and refunds properly on time.

**6.9.4** Furthermore the respondents indicated that the Government can assist in overcoming the current shortage of training and skills in one of the following ways;

- The Government has to make sector focused policies considering current & future needs and to manage the shortage of skilled workforce. The Government should work with TEVTA and other institutes keeping in view the current and future needs of the footwear industry.
- Government should support in the import of CAD machinery and software
- The Government is definitely supporting the industry in the shape of the Government Institute of Leather and Technology, Gujranwala and through TEVTA but more such initiatives is needed, especially in Lahore and its adjoining areas.



- The major industry players provide scholarships to both students and their staff abroad to study. Our respondents mentioned that they tried to collaborate with the Pakistan Institute of Fashion and Design in this regard but to no result. PSDF in partnership with the Government and the private sector can play its part here in terms of providing technical and financial aid and by promoting and providing demand driven technical education & vocational trainings in the region.

## 7 SUMMARY OF FINDING

context of the current shift towards more modern and automated manufacturing processes observed in the sector, the levels of education and the traditional hand craft oriented skill sets that characterize the available labor profile<sup>41</sup>. It is to be noted, the majority of the workforce in this sector is either illiterate, has completed middle school or read up to the Matric level (total 74%). Only 11% of the people employed have above intermediate level qualifications while only 2% are diploma holders in footwear related trades<sup>42</sup>. A scenario appears to be developing whereby manufacturers are making capital investments to modernize and automate production but lack the necessary trained and skilled workforce to support it. At the moment, the sector is filling that gap with continuous on the job training initiatives.

**7.1.5** We therefore examined the skill gap in light of the above context and referenced skill requirements with on the job trainings provided by entities in this sector. It emerges that the large majority of the survey respondents have identified the following skills as key in this scenario<sup>43</sup>

| Key Skills                                 | Response % |
|--|------------|
| Footwear Designing Skills                  | 26         |
| Pattern making Skills                      | 24         |
| Cutting/pasting/lasting/trimming/finishing | 18         |
| Advanced IT Software CAD/CAM skills        | 15         |

TABLE 65: KEY SCENARIO OF SKILLS

**7.1.6** The above is supported by the results of the survey and is reported by our interviews with sector experts. It is interesting to note that the above skills are often the most frequently reported on the job trainings. Conversely, the people occupying these posts are also the most frequent recipients of on-the-job trainings. For the purposes of reference, the most frequently trained designations are:

- Pattern Makers, Designers, Engineers
- Production Managers
- Quality Assurance Managers and Staff

**7.1.7** Survey respondents feel that in addition to these technical skills, managerial and soft skills are also in short supply. The sector is currently seeking people with not only strong technical knowledge but also possess equally strong leadership, communication skills and strong numerical ability. As some players in the market have expanded into retail, the same soft skill set is also in demand at the retail level.

**7.1.8** Similarly survey results indicate that in the next 5 years, the demand for manual skills like the use of basic hand tools, hand sewing and hand embroidery etc., will decrease and these and other manual operations will be phased out to the point where they will only be used in the informal sector. The following skills are expected to be 'Hard to Find' skills in the coming years:

## 7.1 INTRODUCTION

**7.1.1** With a standing in the top 10 global manufacturers of footwear by volume Pakistan's footwear sector appears ready for steady growth. Global demand is increasing and manufacturers looking for international solutions that can take advantage of cheap and efficient economies of scale have their sights set on this region. Domestically, Pakistan's 2.1% population growth rate ensures that local manufacturers will have a ready market for their products. The challenges being faced by this sector therefore are not those of demand, but of availing opportunities.

**7.1.2** Pakistan is known for the quality of its leather internationally. However it is towards synthetics and fashionable designs, that global demand and production has shifted. Pakistan is a net importer of footwear<sup>40</sup>. The larger manufacturers enjoy a steady stream of export business but they stand few and far in between as the sector is predominantly informal and small scale in nature. With a large informal sector reliant upon traditional methods and materials of shoe manufacture and a skills profile to match the same, Pakistan faces a skills deficit that needs to be overcome before it can take full advantage of the opportunities abroad as well as to expand the local market.

**7.1.3** What follows is an assessment of the results of the survey, our views on the current demand and supply of skilled manpower to this sector and projections regarding the same. We will also examine various option and initiatives that can be considered by PSDF in structuring its engagement with this sector and in developing a roadmap for human resources development for the footwear sector in the country.

## DEMAND FOR SKILLS

### a. EXISTING AND FUTURE SKILL GAPS

**7.1.4** The survey results are conclusive that a significant gap in skills exists. This needs to be examined in the

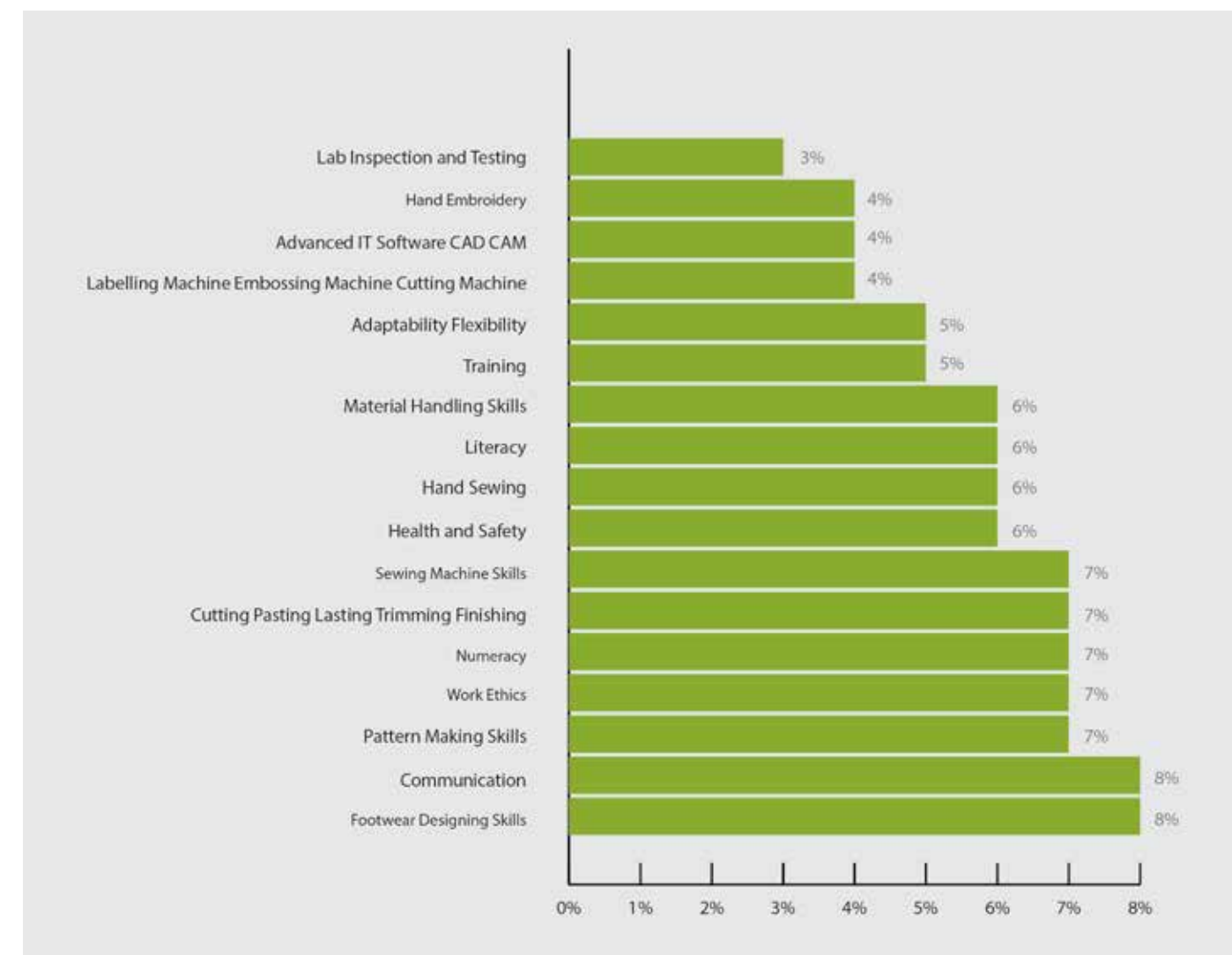


FIGURE 46: SKILLS FOR WHICH DEMAND IS EXPECTED TO INCREASE IN NEXT FIVE YEARS

### b. SKILLS DEMAND BY QUALIFICATIONS AND LEVELS IN CURRENT AND FUTURE EMPLOYEES

**7.1.9** The table below depicts our analysis of skills demanded by respondent organizations with respect to the job roles/levels. The table has been designed keeping in view their responses gathered in relation to survey question where they were asked to share their views on anticipated demand for footwear skills in the next 5 years.

**7.1.10** Word of mouth is the preferred method of recruitment. Though the majority of companies prefer to hire unskilled workers and then train them, they are also keen to employ workers with experience in the production line. The general practice is to train workers while on work. The larger companies often offer short in-house training to the new recruits.

**7.1.11** New hires holding degree/certifications in footwear related trades (with no prior experience) undergo through the same process as well since the quality of the training received does not match the industry requirement<sup>44</sup>. Furthermore, these graduates demand/expect a higher salary which is why the industry prefers to hire raw or inexperienced resource and train them as per their requirements. Recruitment and training at workers' level

is an on-going process as once the employees gain proficiency they are either poached by other companies or switch the job themselves. Employers expressed difficulties in attracting a skilled workforce and felt a strong need for better HR Planning at workers level.

**7.1.12** Majority of the workers were hired in stitching and footwear designing departments followed by upper/bottom making and pattern making. 58% of the respondents replied they do not hire women. Remaining 42% hire women mostly at workers' level -63% (mainly as pattern makers, stitchers, upper/bottom makers and general/basic skills workers) followed by Middle Management Level- 37% (mainly as Footwear Designers, stitching/lasting supervisors and managers, quality assurance managers and production managers).

**7.1.13** Furthermore, at the middle management level Footwear Design skills followed by Advanced IT- CAD/CAM, Product evaluation skills and Color Matching/ quality control are hard to fill vacancies resulting in an almost continuous skills gap. At the supervisory and middle management level, Pattern making skills followed by Trimming/Finishing processes, Soft skills (such as work ethics, numeracy, literacy, health and safety) and Hand sewing skills are hard to fill.

<sup>40</sup> STATEMENT DERIVED FROM THE TRADE STATS, PRODUCTION STATS AND NATIONAL FOOTWEAR DATA MENTIONED IN CHAPTER 3

<sup>41</sup> SEE CHAPTER 5

<sup>42</sup> SEE TABLE 32 AND 33, SECTIONS 4.2.8 AND 4.2.9 IN CHAPTER 4

<sup>43</sup> SEE FIGURE 36, SECTIONS 4.5.17 AND 4.5.18, CHAPTER 4

<sup>44</sup> SEE CHAPTER ON RESPONSES FROM SECTOR EXPERTS, CHAPTER 6



| Skills required VS Roles across all footwear sector trades | Production Manager | Quality Assurance Manager | Procurement Manager | Line In charge | Supervisors | Patterns Makers | Design Engineer | Technicians | Other Skilled Workers/ Staff level | Unskilled Workers |
|--|--------------------|---------------------------|---------------------|----------------|-------------|-----------------|-----------------|-------------|------------------------------------|-------------------|
| Lab inspection & testing                                   |                    | ✓                         |                     |                | ✓           |                 |                 |             |                                    |                   |
| CAD/CAM and Advanced IT                                    |                    |                           |                     | ✓              |             |                 | ✓               |             |                                    |                   |
| Materials handling   |                    | ✓                         |                     |                | ✓           |                 |                 |             | ✓                                  |                   |
| Pattern Making   |                    |                           |                     |                |             | ✓               |                 | ✓           |                                    |                   |
| Footwear Design  |                    |                           |                     | ✓              | ✓           |                 | ✓               |             |                                    |                   |
| Embroidery   |                    |                           |                     |                |             |                 |                 |             | ✓                                  |                   |
| Sewing   |                    |                           |                     |                |             |                 |                 |             | ✓                                  |                   |
| Cutting/Pasting/Lasting/Trimming                           |                    |                           |                     |                |             | ✓               |                 |             | ✓                                  |                   |
| Labeling/Embossing   |                    |                           |                     |                |             |                 |                 | ✓           |                                    |                   |
| Sewing   |                    |                           |                     |                |             |                 |                 | ✓           |                                    |                   |
| Cutting/Pasting/Lasting/Trimming                           |                    |                           |                     |                |             | ✓               |                 |             |                                    |                   |
| Leadership   | ✓                  |                           |                     |                |             |                 |                 |             |                                    |                   |
| Communication  | ✓                  |                           | ✓                   |                |             |                 |                 |             | ✓                                  | ✓                 |
| Work Ethics  |                    | ✓                         |                     |                |             |                 |                 |             | ✓                                  | ✓                 |
| Adaptability   |                    |                           |                     |                |             | ✓               |                 | ✓           |                                    |                   |
| Customer Management  |                    |                           | ✓                   |                |             |                 |                 |             | ✓                                  | ✓                 |
| Footwear Designing Skills                                  |                    |                           |                     |                |             |                 |                 |             |                                    |                   |
| Hand Skills  |                    |                           |                     |                |             |                 |                 |             |                                    |                   |
| Machine Skills   |                    |                           |                     |                |             |                 |                 |             |                                    |                   |
| Soft skills  |                    |                           |                     |                |             |                 |                 |             |                                    |                   |
| Core Skills  |                    |                           |                     |                |             |                 |                 |             |                                    |                   |

TABLE 66: SKILLS' DEMAND IN NEXT FIVE YEARS

## SUPPLY OF SKILLS

### a. EMPLOYERS' ABILITY AND CAPACITY (IN TERMS OF NUMBERS AND TRADES) TO TRAIN INDIVIDUALS

**7.1.14** 56% of the respondents (81 units) have shown willingness to set up a training facility in their manufacturing premises<sup>45</sup>. However, only 2% of the respondents are willing to invest their own capital or might collaborate with other training services. 44% of the respondents (66 units) do not think of the training facility as a necessity, as in their opinion on-the-job trainings provided during the initial phase of employment is more important.

**7.1.15** It has been derived that most respondent companies regardless of the size and nature provide some sort of On-the-Job training to their employees<sup>46</sup>. Further 28% (41 organizations) of respondent organizations are willing to provide OJTs /practical/theoretical training to students of TSPs out of which 32 are formal and 9 are informal companies. Informal sector companies are willing to train students of TSPs but are constrained by space and resources. Formal sector however provides more organized training structure and can accommodate more students but due to lack of industry and TSP linkages students cannot reach out to these companies and vice versa. This is the area where PSDF can play a vital role by setting up a model, where PSDF could fund the trainings of these students.

**7.1.16** Organizations that showed readiness to provide a forum for practical learning also listed the following skills where they provide OJTs to trainees each year;

- Pattern Making
- Footwear Designing
- Advanced IT software CAD/CAM
- Cutting
- Lasting
- Finishing
- Health & Safety

**7.1.17** Further respondents who were not willing to provide practical training facilities to students of TSPs pointed out; time constraints, switch jobs once trained, unwillingness towards work, low energy level, low concentration level and poor / insufficient attention as major reasons for not providing practical/theoretical trainings to TSPs' trainees.

### b. BRIDGING THE SUPPLY GAP – TRAINING SUPPLY AND MODES OF COLLABORATION

**7.1.18** Training and education within the footwear sector can play an essential role as the industry has undergone

significant changes during the last decade. Besides, manufacturing units, both in the formal and informal sector are looking forward to strengthen their position in regional, national as well as international market.

**7.1.19** While footwear manufacturing relies primarily on manual labor, innovations are important in both the technological and the design field of the sector. Innovation in certain sub-sectors is more prominent than in others, therefore the reliance on skilled staff also differs.

**7.1.20** There can be varying elements of an employee training program depending on the specific needs of employees, or groups and divisions within a company, as well as whether the training is on-going or serves to answer a particular problem or challenge.

**7.1.21** The three regions under study show a very diverse picture in terms of industry capacity, as well as the availability of education and training institutes. The options for educational and training facilities specific to footwear related trades in the three regions under study are very limited.

**7.1.22** There are two main target markets for training:

1. Existing employees - up skilling workforce to remain competitive and to address skill shortages
2. Unskilled workers - promoting trade-based career pathways to new entrants

**7.1.23** There are approximately 700 TVET<sup>47</sup> Institutes in Punjab; spread all over the 36 districts covering more than 20 key industrial trades. The stream of technical and vocational education introduced for the development of skilled workforce fully integrates with the formal educational system in Pakistan. However only few TSPs (5 out of 700) are covering footwear specific trades and even they are unable to meet the industry requirement primarily because linkages between TSPs and employers are weak.

**7.1.24** Because of weak institutional linkages with the industry, training is designed around skills, knowledge and processes that are available and supported by TSPs and not those that are necessarily relevant to the market. Furthermore, footwear industry especially footwear manufacturing is no longer appealing to young professionals/ students, and they are turning away from manufacturing sector in favor of high tech industries and service sector<sup>48</sup>. This shift on manpower represents challenges not just to the employers but also to the industry as a key source of future manpower does not view this sector as fertile grounds for employment and career development. Marketing of opportunities within this sector is an area where PSDF, TSPs and establishments can also find common ground.

**7.1.25** PSDF again can play a vital role in bridging the

<sup>45</sup> 54% OF THE RESPONDENTS EXPRESSED THAT THEY WOULD LIKE TO HAVE PSDF'S SUPPORT TO SETUP A FOOTWEAR TRAINING INSTITUTE WITHIN THE FACILITY.

<sup>46</sup> SEE CHAPTER ON RESPONSES FROM SECTOR EXPERTS, CHAPTER 6.

<sup>47</sup> DATA RETRIEVED FROM: [HTTP://WWW.NAVTTC.ORG/TVET\\_PAKISTAN.ASPX](http://www.navttc.org/tvet_pakistan.aspx).

<sup>48</sup> SEE SECTION 6.3.7 FROM CHAPTER 6.

supply gap, by helping the institutions in one of the following ways;

- i. Decreasing theory and increasing hands on OTJ training requires access to modern machinery and processes. PSDF can build capacity within TSPs to reach out to employers through placement/internships programs
- ii. PSDF can build capacity within TSPs to arrange Guest lecturer programs for students, where professionals and technical people are invited from top tier companies or key players of the industry.
- iii. PSDF can help TSPs in Co-organizing Job Fairs where key players from the industry can be invited
- iv. PSDF can organize regular industry roundtables bringing TSPs and owners together to discuss needs and expectations and update each other on developments. They can also use this forum to derive uniformity of curriculum and can endorse curricula.

c. TSPs – STRENGTHS AND WEAKNESSES

7.1.26 Only 24% of the organizations are aware of training providers involved in technical and vocational footwear trainings in Punjab. Amongst these organizations, the institutions that are most known to the organizations are;

- Government institute of Leather and Technology, Gujranwala
- Pakistan Institute of Fashion and Design, Lahore

7.1.27 Further 62% of respondents indicated that they did not provide any sort of support towards Technical and Vocational Education in institutes, and only 28% of respondents identified areas of training within their industry that could be met by these institutions (e.g. pattern making/designing operation). However, this apparent lack of support may be based on a lack of information and understanding of what several institutes’ programs can offer to Footwear organizations.

7.1.28 Survey results indicate that almost every TSP has some sort of local affiliations/partnerships with Government/Public bodies and/or associations and private organizations. Institutes like UMT and Pakistan institute of Fashion and Design have acquired international affiliations for different trades/sectors but none of the institutes have any international affiliations in footwear courses and trainings.

7.1.29 Selection and recruitment of teaching staff, in both the public and private sector TSPs, is carried out by a management committee which includes key industry stakeholders like the vice chancellor, director general, and senior professors etc. Further the institutions also focus on training and development of their instructors on a frequent basis so that the skill set of their instructors is de-

veloped with changing requirements of the industry.

7.1.30 The survey results also indicate that few institutes provide post training facilities to their students. They have placement offices that are solely dedicated to bridging the gap between the students and the employers in the industry. This is mostly done by providing internship opportunities to their students.

d. GAPS AND AREAS WHERE CURRICULA DEVELOPMENT IS NEEDED

7.1.31 The major footwear functions where skill shortages exist and where curricula development is needed, as reported by our respondents are summarized as follows:

AWARENESS OF PSDF

7.1.32 Majority of the organizations (90%) are unaware of PSDF, its role, vision, mission & responsibilities and programs that are being initiated in the province of Punjab. Out of these organizations that are unaware of PSDF, 37 organizations (79%) are from the formal sector, which represents an opportunity for PSDF to engage with the sector in a more productive manner.

7.2 DEMAND PROJECTIONS FOR TRAININGS IN THE FOOTWEAR SECTOR

7.2.1 In order to determine estimations of demand for training for the footwear sector it was first necessary to estimate the total demand for training as of 2015. As a first step towards estimating demand, the results of the survey were referenced and a list drawn of the top most requested training courses by both the respondent establishments and the sector experts. The list of courses is given below for reference:

- Footwear Design
- Pattern Making
- Cutting/pasting/lasting/trimming
- CAD/CAM and Advanced IT
- Lab inspection & testing
- Health and Safety
- Communication
- Customer management
- Work ethics
- Sewing
- Embroidery
- Leadership
- Materials handling
- Labeling/embossing

| Skills for which Curricula Development in needed | Skills Gap   |
|--|--|
| Shoe Designing                                   | <ul style="list-style-type: none"><li>• Acute shortage due to high industry demand and low supply of good designers</li><li>• Lack of foreign qualified professional shoe designers to teach the subject (both at institute and organization)</li><li>• Lack of local qualified shoe designers to teach the subject (both at institute and organization)</li><li>• Fashion designers taking up footwear designing as a career due to high demand/high salary being offered</li><li>• Unavailability of creative designers with the ability to create own designs instead of copying /modifying</li><li>• Inability to create trendy designs which are easier to produce and are cost effective</li><li>• Lack of knowledge about shoe anatomy, hence unable to produce proper designs</li><li>• Lack of workshops where the designers can get hands on experience on shoe designing</li><li>• Lack of knowledge of latest fashion trends</li><li>• Lack of knowledge/inability to use of latest software on footwear designing</li><li>• Unavailability of a well-designed course covering every aspect of shoe designing</li><li>• Aging karigars/Ustaad- skills have not been passed on to family/shagirds</li></ul> |
| Pattern making                                   | <ul style="list-style-type: none"><li>• Inability to convert designs on paper</li><li>• Inability to create patterns of various sizes</li><li>• Lack of knowledge about shoe anatomy and shoe sizes hence unable to make proper patterns with respect to size</li><li>• Lack of knowledge/ability to use pattern making software</li></ul>   |
| Cutting  | <ul style="list-style-type: none"><li>• Lack of knowledge of handling various tools/ machine/ equipment used for cutting</li><li>• Lack of knowledge of latest technologies used in the cutting department (bulk cutting, laser cutting etc.)</li><li>• Lack of knowledge on how to go about cutting process causing minimum wastage of material</li><li>• Inability to follow design, match patterns ( printed, embossed material) to cut identical pair of shoes</li><li>• Lack of training staff in the footwear industry itself to train the new hires</li><li>• Lack of training institutes</li><li>• Lack of practical training at the institutes /hands on exposure to a variety of material and cutting tools</li></ul>  |
| Stitching/Upper Stitching/Closing                | <ul style="list-style-type: none"><li>• Inability to stitch neatly with minimum errors/wastage of material</li><li>• Inability to match colors (matching threads color with material)</li><li>• Lack of training staff in the footwear industry itself to train the new hires</li><li>• Lack of training institutes</li><li>• Lack of practical training at the institutes/hand on exposure to a variety of stitching methods (hand stitching, machine stitching , use of various size and type of needles based on the type of stitching required and material in us</li></ul>  |
| TABLE 67: SKILLS GAP                             |  |

7.2.2 For the purposes of demand projections, the definitions of Large, Medium, and Small & Micro given in the report have been used. Furthermore, for the purposes of classification only and for representation of data, we have assumed that the distribution of Large Medium, Small & Micro units is representative.

7.2.3 The footwear sector in Punjab employs an estimated 157,500 people over 2,327 units. Using the above assumptions the distribution of units by size and their employment figures are estimated as below:

| Unit size                              | No. of units | Estimated Employment |
|--|--------------|----------------------|
| Large                                  | 135          | 116,505              |
| Medium                                 | 282          | 17,318               |
| Small                                  | 345          | 9,446                |
| Micro                                  | 1,565        | 14,230               |
| Total                                  | 2,327        | 157,500              |
| TABLE68: EMPLOYMENT IN FOOTWEAR SECTOR |              |                      |

7.2.4 The next step in estimating demand was to project the growth of the footwear sector. As mentioned earlier in the report, the footwear sector is currently growing @6%pa. We have assumed that generally this growth rate will result in a corresponding increment in labor deployment. Furthermore, it is observed from our primary and our secondary research that while the large and medium

scale units in the footwear sector are enjoying the 6% growth rate, units of small sizes are not. We have therefore assumed the following growth rates by size:

- Large 6%
- Medium 6%
- Small 4%
- Micro 3%

7.2.5 As a further modifier for employment we have used observed trends towards increasing automation as a modifier to correct for growth in employment figures.

7.2.6 Based on the above, employment growth rates in the footwear sector for the coming 5 years including 2015 work out to be as follows:

|                            | 2015 | 2016 | 2017 | 2018 | 2019 |
|----------------------------|------|------|------|------|------|
| Growth rate employment (%) | -    | 5.31 | 5.32 | 5.33 | 4.78 |
| TABLE 69: GROWTH RATE      |      |      |      |      |      |



**7.2.7** The pattern of employment within the sector as determined from the survey is as under:

| Employment Cadre                      | Percent of total workforce |
|---------------------------------------|----------------------------|
| Management                            | 18%                        |
| Supervisory                           | 14%                        |
| Skilled Labor                         | 51%                        |
| Unskilled Labor                       | 17%                        |
| <b>TABLE70: PATTERN OF EMPLOYMENT</b> |                            |

**7.2.8** Using the above estimations it is possible to profile employment by size across the four management cadres as follows:

|  | Large  | Medium | Small | Micro |
|--|--------|--------|-------|-------|
| Management                                     | 20,970 | 3,117  | 1,700 | 2,561 |
| Supervisory                                    | 16,311 | 2,425  | 1,322 | 1,992 |
| Skilled Labor                                  | 59,418 | 8,832  | 4,818 | 7,257 |
| Unskilled Labor                                | 19,806 | 2,944  | 1,606 | 2,419 |
| <b>TABLE71: EMPLOYMENT BY MANAGEMENT CADRE</b> |        |        |       |       |

**7.2.9** With labor distributions, growth rates in employment and with course requirements emerging from the survey, it is possible to project the training needs of the sector till 2019 as follows:

| Courses  | 2015    |       |        |       | 2016    |       |        |       | 2017    |       |        |       | 2018    |       |        |       | 2019      |       |        |       |
|--|---------|-------|--------|-------|---------|-------|--------|-------|---------|-------|--------|-------|---------|-------|--------|-------|-----------|-------|--------|-------|
|  | Micro   | Small | Medium | Large | Micro   | Small | Medium | Large | Micro   | Small | Medium | Large | Micro   | Small | Medium | Large | Micro     | Small | Medium | Large |
| Footwear Design  | -       | 1,846 | 2,114  | 2,772 | -       | 1,957 | 2,199  | 2,855 | -       | 2,074 | 2,287  | 2,941 | 10,123  | 2,198 | 2,379  | 3,029 | 10,949.45 | 2,315 | 2,464  | 3,068 |
| Pattern Making   | 15,767  | 4,028 | 1,630  | 2,586 | 16,713  | 4,269 | 1,695  | 2,663 | 17,716  | 4,526 | 1,763  | 2,743 | 9,646   | 4,797 | 1,036  | 2,087 | 8,348     | 4,304 | 988    | 1,718 |
| Cutting/pPasting/<br>Lasting/Trimming                        | 34,689  | 5,034 | 400    | 1,281 | 36,769  | 5,336 | 416    | 1,320 | 38,976  | 5,657 | 432    | 1,359 | 31,707  | 5,996 | 450    | 1,400 | 35,194    | 7,042 | 466    | 1,407 |
| CAD/CAM and<br>Advanced IT                                   | -       | -     | 2,314  | 1,910 | -       | -     | 2,407  | 1,968 | -       | -     | 2,503  | 2,026 | 8,595   | -     | 3,402  | 2,825 | 8,798     | -     | 3,609  | 3,389 |
| Lab Inspection &<br>Testing                                  | -       | -     | 1,262  | 1,013 | -       | -     | 1,313  | 1,044 | -       | -     | 1,365  | 1,075 | -       | -     | 1,420  | 1,107 | -         | -     | 1,471  | 1,128 |
| Health and Safety  | -       | 1,510 | 378    | 769   | -       | 1,601 | 394    | 792   | -       | 1,697 | 410    | 815   | -       | 1,799 | 426    | 840   | -         | 1,894 | 441    | 739   |
| Communication  | -       | -     | 210    | 384   | -       | -     | 219    | 396   | -       | -     | 227    | 408   | -       | -     | 237    | 420   | -         | -     | 245    | 441   |
| Customer Man-<br>agement                                     | -       | 671   | 694    | 350   | -       | 711   | 722    | 360   | -       | 754   | 751    | 370   | -       | 800   | 781    | 382   | -         | 841   | 809    | 401   |
| Work Ethics  | -       | -     | -      | 221   | -       | -     | -      | 228   | -       | -     | -      | 235   | -       | -     | -      | 242   | -         | -     | -      | 253   |
| Sewing   | 26,629  | 1,175 | 158    | 836   | 28,229  | 1,245 | 164    | 861   | 29,921  | 1,320 | 171    | 887   | 31,725  | 1,399 | 177    | 914   | 33,449    | 1,473 | 184    | 959   |
| Embroidery   | 20,147  | 1,007 | -      | 850   | 21,357  | 1,067 | -      | 876   | 22,637  | 1,131 | -      | 902   | 24,003  | 1,199 | -      | 929   | 25,306    | 1,263 | -      | 975   |
| Leadership   | -       | -     | 54     | 221   | -       | -     | 54     | 230   | -       | -     | 57     | 235   | -       | -     | 60     | 242   | -         | -     | 61     | 253   |
| Materials Handling   | -       | -     | -      | 524   | -       | -     | -      | 539   | -       | -     | -      | 556   | -       | -     | -      | 572   | -         | -     | -      | 601   |
| Labeling/Emboss-<br>ing                                      | 19,272  | 2,047 | 230    | 513   | 20,427  | 2,171 | 241    | 527   | 21,655  | 2,300 | 250    | 543   | 22,960  | 2,439 | 260    | 560   | 24,206    | 2,587 | 270    | 593   |
| Total  | -       | 1,846 | 2,114  | 2,772 | -       | 1,957 | 2,199  | 2,855 | -       | 2,074 | 2,287  | 2,941 | 10,123  | 2,198 | 2,379  | 3,029 | 10,949.45 | 2,315 | 2,464  | 3,068 |
|  | 157,500 |       |        |       | 166,334 |       |        |       | 175,678 |       |        |       | 185,561 |       |        |       | 194,883   |       |        |       |
| Rate of increase in<br>workforce (%)                         |         |       |        |       | 5.31    |       |        |       | 5.32    |       |        |       | 5.33    |       |        |       | 4.78      |       |        |       |
| TABLE 72: DEMAND PROJECTIONS FOR TRAINING IN FOOTWEAR SECTOR |         |       |        |       |         |       |        |       |         |       |        |       |         |       |        |       |           |       |        |       |

## DEMAND AND SUPPLY SCENARIO FOR FOOTWEAR KEY SKILLS' TRAININGS DURING 2019

7.2.10 The total number of seats available within TSPs catering to this sector is mentioned in below table. Based upon our projections the gap between the total number of seats available and the estimated potential TVET trainees within the sector is given as under:

| Courses                          | 2015               |                             |   | 2019               |                             |   |
|----------------------------------|--------------------|-----------------------------|---|--------------------|-----------------------------|---|
|                                  | Skills Demand (SD) | No. of Seats Available (SA) | Gap expected in Demand and Supply (SA-SD) | Skills Demand (SD) | No. of Seats Available (SA) | Gap expected in Demand and Supply (SA-SD) |
| Footwear Design                  | 6,733              | 604                         | (6,129)                                   | 18,796             | 983                         | (17,813)                                  |
| Pattern Making                   | 24,011             | 753                         | (23,258)                                  | 15,359             | 804                         | (14,555)                                  |
| Cutting/Pasting/Lasting/Trimming | 41,404             | 787                         | (40,618)                                  | 44,108             | 936                         | (43,173)                                  |
| CAD/CAM and Advanced IT          | 4,224              | 377                         | (3,848)                                   | 15,795             | 566                         | (15,229)                                  |
| Lab Inspection & Testing         | 2,275              | 347                         | (1,928)                                   | 2,600              | 362                         | (2,238)                                   |
| Health and Safety                | 2,657              | 207                         | (2,450)                                   | 3,074              | 224                         | (2,850)                                   |
| Communication                    | 595                | 271                         | (324)                                     | 686                | 266                         | (420)                                     |
| Customer Management              | 1,715              | 167                         | (1,547)                                   | 2,052              | 178                         | (1,873)                                   |
| Work Ethics                      | 221                | 106                         | (115)                                     | 253                | 103                         | (151)                                     |
| Sewing                           | 28,798             | 419                         | (28,379)                                  | 36,065             | 502                         | (35,563)                                  |
| Embroidery                       | 22,004             | 352                         | (21,653)                                  | 27,544             | 421                         | (27,123)                                  |
| Leadership                       | 275                | 124                         | (151)                                     | 315                | 120                         | (194)                                     |
| Materials Handling               | 524                | 283                         | (241)                                     | 601                | 274                         | (327)                                     |
| Labeling/Embossing               | 22,062             | 328                         | (21,734)                                  | 27,656             | 392                         | (27,264)                                  |

TABLE 73: DEMAND AND SUPPLY SCENARIO-2019

7.2.11 The growth in the gap between 2015 and 2019 represents substantial potential for trainings and capacity building in this sector. However, there is a risk in the limited number of seats available in TSPs. We have assumed this figure to remain constant over 5 years for the purposes of projection. In practical terms we anticipate that this figure, barring substantial investments in teaching capacity infrastructure and establishment of new institutes, will actually decrease further raising the gap between demand and supply of TVET training to this sector.

7.2.12 This is borne out by our discussions with TSPs that showed that they were at the present unwilling to commit capital towards capacity enhancement. Secondly, without investments in training facilities, TSPs will not be able to keep up with the demand for more advanced technical trainings.

7.2.13 This is not expected to negatively impact demand on the other hand, which is encouraging for PSDF.

## 7.3 CONCLUSIONS

7.3.1 The study results depict that one of the problems

for the industry is that the manufacturing sector is no longer appealing to young professionals, so fewer choose manufacturing related training or employment. The youngsters are generally turning away from the footwear manufacturing sector in favor of high-tech industries and the service sector<sup>49</sup>.

7.3.2 An additional concern is lack of education and training opportunities for footwear related trades as per industry requirements. The main change identified by the majority of respondents involves the need to address enterprise and technology-specific skill requirements. In the manufacturing sector, the workplace is the most critical context for skill development, and this is an ongoing challenge for any training system. There is a critical need to address enterprise and technology-specific skill requirements. The majority of the manufacturers use different type of tools /machines, and they require employees to be specifically skilled in the use of these machines. However, it is unrealistic for any training system to provide training on all types of tools/machineries. It is also unrealistic to expect any training system to provide skilled technicians to deliver specialized training on the use of every production machine across the industry. As a result, employers are training their own staff and their training is delivered

in-house.

7.3.3 More importantly, the present system is not being able to deliver the qualitative requirements, either. The study reveals that there is little congruity between the local industry and the training available in vocational training institutes. The above statement is also supported from the evidence gathered from sector experts & TSPs where majority of the respondents are of the opinion that there are gaps between the curriculum taught and the requirements of the industry<sup>50</sup>. Rather than training according to the needs of the local economy, institutes tend to offer simply what they have. Trainees therefore, emerge from the system inadequately skilled and consequently, with limited opportunities of employment.

7.3.4 The present skills development system in Pakistan follows a curriculum-based, time bound approach. Certification is based on completion of courses and passing exams rather than demonstration of competency. The rigidity of this approach makes it difficult for training programs to meet the skill needs of industry. They focus on how far learners have progressed through an institution's curriculum rather than assessing how well they are able to demonstrate the competencies required in the workplace.

7.3.5 The National Vocational & Technical Training Commission (NAVTC) of Pakistan defines a competency as follows: A competency describes exactly what a worker should be able to do and must know in order to effectively perform a job in the workplace. A competency-based training approach therefore, focuses on the demonstration of the actual skills required in the workplace. The requirements of the workplace can be best determined by the employers themselves. In Pakistan unfortunately, employers play a negligible role in influencing what is taught in TVET institutes. Because of weak institutional linkages with the industry, training is designed around skills and knowledge that are not necessarily relevant to the market. The government has in the past attempted to liaise with employers in the development of skill standards and endorsement of curricula, but this engagement was not wide enough to be truly meaningful. As a result, only a few skill standards were developed, which have now become obsolete since they were not properly reviewed, updated or improved according to international best practices.

7.3.6 There are two types of training that take place in the private sector. One is in terms of private sector training providers offering TVET courses. The second is training by firms in their own facilities. Such training is usually in-service training and only available to the firm's own employees. It is usually only larger firms that have such facilities and there is a much lower propensity for medium and small firms to train. Training by firms is usually workplace based and therefore, practical and relevant to industry needs but it does not lead to any nationally recognized certification. Therefore, though workers gain skills, their skills are not formally recognized beyond the boundaries of the firm.

## 7.4 RECOMMENDATIONS

### ROLE PSDF CAN PLAY IN FILLING THE SKILL GAPS

7.4.1 PSDF can respond to the changing industry by working closely with the Technical and Vocational Institutes in collaboration with businesses by promoting and providing demand driven technical education & vocational training in the region.

7.4.2 Develop advisory group represented by footwear industry/sub industry, training providers (TEVTA, Footwear Institute Charsadda, Pakistan Institute of Fashion and Design etc.), the government and other stakeholders (Pakistan Footwear Manufacturers Association, Members of Chamber of Commerce etc.) to seek consultation / co-operation:

- To provide accurate industry intelligence about current and future skill needs and training requirements.
- For the development of the curricula, training material for the training providers, assessment guidelines and reviewing and updating or improving according to the changing needs
- In selection/recruitment/training of the trainers (development of the assessment and selection criteria for the trainers, involve in selection and recruitment process, development of curricula/training material, assessment etc.) and reviewing and updating or improving according to the changing needs
- In performance evaluation of the Training Service Providers
- In developing indicators to measure the performance of TSP to monitor outputs and outcomes for trainees and decide on their continued status
- Acquire the services of ex-industry professionals on regular basis.

7.4.3 Developing a flexible delivery system by:

- Offering part-time and evening-shift programs and using the premises of existing educational establishments after working hours
  - By introducing diversified range of programs to alleviate the current shortages:
- Industry Specific Courses – work on industry's need for technology - specific skills that cannot be learnt and/or applied in generic classroom-based environments and also for skills where there are difficulties in releasing production staff
  - Mentoring Program - to provide the possibility for personalized guidance in emerging and advanced

<sup>49</sup> SEE SECTION 6.3.7 FROM CHAPTER 6.

<sup>50</sup> SECTION 5.2.24 FROM CHAPTER 5 AND SECTION 6.7.8 AND 6.7.9 FROM CHAPTER 6.



technologies (Designing/Pattern Making by the use of CAD/CAM and other specialized software)

- Outreach Programs- for the youth and neglected populace; by offering short-term skill development projects –preferably in the cluster/regions where training facilities are not available. This can also create opportunities for adults not currently employed as trades people to enter and have the skills they already possess recognized.
- Specialized Courses- Develop and offer need-based short courses
- Short Courses- 2-3 days workshops or courses emphasizing key skills

#### 7.4.4 Increase the role of entrepreneurs by:

- Encouraging patronizing PSDF support programs by actual delivery of flexible work-based training and assessment as per enterprises requirement leading to recognized certification.
- Expand the base of in-service training to general public
- Encouraging them to lend equipment (moveable) to training institutes and provide opportunities for hand-on - experience on plants/machineries (non-moveable) at their premises
- Re-establish the appeal of the industry to young people via social media and other interactive services
- Opportunities for students to participate in research projects, exhibitions, competitions
- Offering industry sponsorship-establishing units at the training institutes where the employees can be sent for off the job trainings
- Providing career guidance and placement services

#### 7.4.5 Enhance the role of training service providers:

- Assist in teachers training program in order to upgrade their teaching abilities, skills and knowledge of the subject
- Deliver quality training and promote international recognition of the system.
- Providing career guidance and placement service.

Annexures

### Scope of Work

- a. Preparation of questionnaire to be administered to 40-50 formal manufacturing units, and 100 cottage/informal units within the footwear sector of Punjab
- b. Interviews of (up to 50) business experts to identify Skills needs and gaps. To obtain Feedbacks on the relevance and quality of courses, effectiveness of Training Service Providers (TSPs) and assessment of producers as trainers
- c. Interviews of 7 TSPs for examining and informing on the current training landscape, including TSPs and in-house training services provided by manufacturers.
- d. To compile detailed quantitative and qualitative analysis, based on the preceding points, along with recommendations in final report.

### *INDUSTRY SNAPSHOT*

- a. Provide overview of the sector (formal and informal) and its relevance to Pakistan, including production processes, export performance, and regulatory environment;
- b. Map the sector in terms of the size and product characteristics of its various entities; also identify geographical clusters and specializations within each;
- c. Provide a brief overview of the sector's trading performance for key products, including the sector's global trade position, national sector data, and imports and exports over the last five years;
- d. Describe briefly the current status of the industry and changes that are beginning to, or are expected to affect it; in particular, technology, organizational changes, price competition, etc. and the sector's response to these;
- e. Provide a summary of other studies, reports, policy papers, strategies, etc. developed in recent years for the sector.

### *SKILLS ANALYSIS*

#### SKILLS DEMAND

- a. Provide an occupation-to-skills mapping, followed by a skills-to-qualifications mapping exercise (map each job title or role to skills if formal qualifications are not available);
- b. Identify existing and future skills gaps in current labor force;
- c. Work out an estimate of skills needs of the sector broken down by qualifications and levels;
- d. Identify existing and future skills shortages in new recruitments;

#### SKILLS SUPPLY

- a. Identify and assess existing sources of training supply;
- b. Assess employers' ability and capacity (in terms of numbers and trades) to train individuals;

- c. Explore possible training delivery modes which can be funded by PSDF, assess possible levels of industry contributions and that of public-sector TSPs, and shall suggest mechanisms for ensuring job placement of PSDF-funded trainees after completion;
- d. Identify strengths and weaknesses of private-sector TSPs; propose areas for investment by public providers, append to the report a list of TSPs with courses and enrolment capacity;
- e. Point out gaps and areas where curricula development is needed;
- f. Analyze certification options (national and international) and provide an assessment in view of industry needs;



### *Sources of Information*

- i. Pakistan Footwear Manufacturers Association (PFMA)
- ii. Small and Medium Enterprises Development Authority (SMEDA)
- iii. Federal Chambers of Commerce
- iv. TDAP- Trade Development Authority of Pakistan (formerly Export Promotion Board)
- v. WTO Cell of the Government of the Punjab
- vi. Lahore Chamber of Commerce & Industry (LCCI)
- vii. Federal Bureau of Statistics
- viii. Federation of Pakistan Chambers of Commerce & Industry (FPCCI)
- ix. UN COMTRADE Data
- x. Punjab Development Statistics
- xi. Pakistan Institute of Trade and Development (PITAD).
- xii. Pakistan Tanners Association (PTA)
- xiii. Pakistan Institute of Development Economics (PIDE) etc.

### **POLICY INITIATIVES**

1.1.1 In the recent past, the business climate of the country has been negatively impacted by the security situation, energy deficit and the law and order situation. That notwithstanding, the government appears committed, to set out policy guidelines and identify principal areas of action to strengthen different aspects of Pakistan's export competitiveness. The Government of Pakistan as evidenced in second Strategic Trade Policy Framework has already taken some steps and is planning to take the following key policy initiatives.

1.1.2 The Government has planned to strengthen the training and product development institutes, running under Ministry of Commerce and TDAP after carrying out a detailed 'entity improvement diagnostic and audit'. This would help these institutions produce better quality human resource and designs for our industry.

1.1.3 Export promotion needs strong support by a country's Export Promotion Agencies (EPAs). It has been decided by the Government in Trade Policy Framework 2012-2015 to:

- I. Overhaul trade offices abroad by providing both financial and improved human resource after carrying out a performance analysis.
- II. Constitute a high level 'Trade Committee' to evaluate our trade performance on a quarterly basis and to address specific issues hampering Pakistan's foreign trade and competitiveness.

1.1.4 In order to encourage fresh investments in export oriented industries in a challenging economic environment, it has been decided to provide mark up support of 2% on existing Long term financing facility [LTFF] to leather, engineering goods including auto parts, horticulture, processed food, marble & granite, sports goods and computer related services sectors

1.1.5 To ease constraints on availability of capital, it has been decided to provide a further markup reduction of 1.5 percent from the prevailing rates to a range of sectors of which footwear is one.

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<sup>1</sup> Data retrieved from: Strategic Trade Policy Framework, Government of Pakistan , 2012-2015



# **FOOTWEAR TRAINING PROVIDERS GLOBALLY**

| Institute  | Courses Offered                                    | Duration           | Key Course Content   |
|--|--|--------------------|--|
| 1. De Montfort University Leicester United Kingdom   | Undergraduate Courses - Footwear Design BA (Hons.) | 3 year             | Complete Footwear Studies<br>Optional modules: Style and Color Prediction, Technical Footwear Option Fashion Accessories<br>Advanced Footwear Studies and Major Project  |
| 2. Leicester College, United Kingdom                 | Footwear Foundation Degree                         | 2 years            | Footwear Fashion and Design, Production Technology, Footwear Buying, Supply and Management, Quality Assurance, Style Prediction and Marketing Strategies, Manufacturing Technology, Professional Development, Product Design and Development   |
| 3. Fashion Institute of Design and Merchandising USA | Associate of Arts, Advanced Study (A.A.)           | 9 months           | Applied Footwear Design ,Marketing Strategies For Footwear, Historical Footwear Research & Trend Analysis ,Creative Design For Footwear, Industry Practices, Pattern Drafting For Footwear, Computer – Aided Design For Footwear, Footwear Collection Development  |
| 4. Malaysia Footwear Design Centre                   | Industrial Skill Enhancement Program               | 10 months program; | Soft Skills5S,Technical Report Writing, SHRDC Domino Race, Creativity and Innovation ,Presentation Skills .Traditional Shoe Making-Fundamentals in Shoe Design, Fashion Design Strategy, Shoe Material and Technology, Shoe Classification, Traditional Pattern Making ,Construction, Preparation , Stitching, Lasting, Finishing , Quality Control Footwear Project, Presentation and Assessment, Studio Work, Practical Session, Theory Session and Company Visit Advance Technology Digitizing Scanner (Basic & Advance), Shoe master Software Training 2D/3D Cutter Output |
| 5. Lanka Institute of Fashion Technology             | Advanced Diploma In Footwear & Accessory Design    | 2 ½ years          | The course aims to provide the opportunity for students to study footwear and accessories within the context of fashion. The course will develop an appropriate knowledge base of particular and generic skills and encourage integration between art and design practice, historical/ theoretical studies and professional practice.  |

| Institute                                    | Courses Offered                     | Duration | Key Course Content   |
|--|-------------------------------------|----------|--|
| 6. Central Footwear Training Institute India | BA (Hons)                           | 1 year   | <ul style="list-style-type: none"> <li>The first three semesters are mainly based on creative and technical skill development. The first semester aims to promote drawing, design and research skills placed within the critical context of fashion through the study of theoretical and studio based issues. In the second and third semester concept and skills development with tutorials for independent research will be encouraged.</li> <li>The fourth and fifth semesters are dedicated for the dissertation and the final major project. Footwear and Accessory students will work alongside Fashion and textiles students and project integration will be encouraged. On completion of the 5th Semester students present their Final Major Project to the internal examiners and then to the external examiner.</li> </ul> <p>The final year of the course encompasses the final major project, which is the design and production of a capsule collection of foot wear and/ or accessories supported by academic research. Where ever possible, the project is produced in collaboration with industry. Students may also get to produce work for the London and/ or Northampton graduate fashion shows.<br/>(The final year of the degree could be either completed in Sri Lanka or in the UK)</p> |
|  | Footwear & Accessory Design Diploma | 2 Year   | Design & Pattern Cutting( Art, Design & Fashion, Design & Pattern Cutting, Pre-Production Technology) Materials, Footwear Technology (Clicking, Closing, Lasting And Making Technology, Hand Shoe Making) Introduction To Management(Purchasing and Stores Control, basic Costing), General (Quality Assurance And Control) Studies Units (Computer Studies, International Business and Language, Applied Science),Product Development, CAD & Pattern Engineering) Materials(Materials and Testing) , Shoe Making, Shoe Faults and   |



| Institute   | Courses Offered   | Duration | Key Course Content  |
|---|---|----------|---|
| 7. FDDI School Of Footwear Design, Production & Management (FSFDPM) |   |          | Customer Complaints, Advanced technology, Foot Comfort, Applied Management (Financial Controls, Human Resource Management, Marketing, Factory Work Experience, Setting Up In Business)  |
|   | Post Graduate   | 1 Year   | Design & Pattern Cutting, Clicking Technology, Closing Technology, Making Technology, General Management, Industrial Accountancy & Costing, Entrepreneurship Development, Advanced Technology, Material Science   |
|   | Short Term Course                                       | 3 months | Design & Pattern Cutting, Shoe Upper Closing, Lasting Making & Finishing, Advanced Shoe Styling   |
|   | MBA<br>(Footwear Design, Production & Management)       | 2 Years  | Product Knowledge, Material Foundation, Pattern & Pre-Prod. Engineering CAD, Footwear Prod. Technology, Cutting, Stitching, Lasting, Footwear Constructions, Finishing, Lab Testing, Sports Shoe Technology, Personality Development, Communication, Community Development, Computer Science, Production Planning & Control, Material Management, Production Management, Domestic & International Marketing Management, Accounting & Finance, HRD and Personnel Management, Operation Management, Business Policy, Sourcing & Merchandising, Customer Relationship Management, Sales Management, Retail Management, Six Sigma and Productivity Improvement Techniques etc. Industrial Training, Projects are the integral part of training program. |
|   | M. Design<br>(Creative Design & CAD/CAM)                | 2 Years  | Material and Product Information, Basics of Cutting, Closing, Components, Lasting and Finishing, Design Concepts, Advanced Illustration & Technical Designing, Range Building, CAD Applications, Professional Design Management Practices, Application of Design Concept & Design Validation.   |
|   | B. Design<br>(Footwear Design, Production & Management) | 4 Years  | Industrial Training, Projects is the integral part of training program.<br>Product Knowledge, Material understanding, Design , Fashion, Styling, Product development with the usage & exposure of high end soft wares Equipments like Crispin, Coral draw, Photoshop, ,CAD/CAM, Die less  |

| Institute | Courses Offered | Duration | Key Course Content  |
|-----------|-----------------|----------|---|
|           | Management      |          | cutting, the intricacies involved in the manufacturing operations like Cutting technique, Closing techniques, component manufacturing techniques, Lasting & Finishing techniques etc., with the blending of management core and functional management subjects like Basic Economics, Communication, Basic Engineering., Principal of Management, Personality Development, Computer Science, Lab Testing, Marketing, HRM, Organization Behavior, Project Management, Production Operation Management, Productivity Management, Merchandising, Footwear Retail Management, Polymer Technology, Production Planning & Control, Sports shoe Technology, TQM, Pattern Engineering for various constructions & Range Building, Basic Creative Designing, Product Costing, Visual Merchandising etc. |



# TOP 10 EXPORTERS OF ALL VALUE CHAINS OF FOOTWEAR HS-64 (2012)

TABLE 1: TOP 10 EXPORTERS OF WATERPROOF FOOTWEAR (HS 6401) 2011

| Sr. No. | Country            | USD (millions) | Share | Pairs (millions) | Share | Average Price |
|---------|--------------------|----------------|-------|------------------|-------|---------------|
| 1       | China              | 658            | 42.2% | 103              | 50.6% | \$6.37        |
| 2       | Italy              | 162            | 10.4% | 19               | 9.1%  | \$8.73        |
| 3       | France             | 85             | 5.5%  | 6                | 2.7%  | \$15.25       |
| 4       | Netherlands        | 50             | 3.2%  | 3                | 1.7%  | \$14.50       |
| 5       | Hong Kong          | 36             | 2.3%  | 2                | 0.9%  | \$19.13       |
| 6       | Germany            | 33             | 2.1%  | 3                | 1.3%  | \$12.23       |
| 7       | USA                | 30             | 1.9%  | 2                | 1.2%  | \$12.67       |
| 8       | Portugal           | 29             | 1.9%  | 3                | 1.6%  | \$9.09        |
| 9       | Bosnia Herzegovina | 27             | 1.7%  | 2                | 1.1%  | \$11.91       |
| 10      | Panama             | 24             | 1.6%  | 3                | 1.2%  | \$9.59        |

TABLE 2: TOP 10 EXPORTERS OF RUBBER & PLASTIC FOOTWEAR (HS 6402) 2011

| Sr. No. | Country     | USD (millions) | Share | Pairs (millions) | Share | Average Price |
|---------|-------------|----------------|-------|------------------|-------|---------------|
| 1       | China       | 17 603         | 61.4% | 6 423            | 82.9% | \$2.74        |
| 2       | Vietnam     | 1 093          | 3.8%  | 89               | 1.1%  | \$12.34       |
| 3       | Belgium     | 1 087          | 3.8%  | 97               | 1.2%  | \$11.24       |
| 4       | Germany     | 1 070          | 3.7%  | 73               | 0.9%  | \$14.72       |
| 5       | Hong Kong   | 887            | 3.1%  | 118              | 1.5%  | \$7.53        |
| 6       | Italy       | 847            | 3.0%  | 38               | 0.5%  | \$22.37       |
| 7       | Netherlands | 612            | 2.1%  | 50               | 0.7%  | \$12.12       |
| 8       | Panama      | 598            | 2.1%  | 72               | 0.9%  | \$8.36        |
| 9       | Brazil      | 475            | 1.7%  | 83               | 1.1%  | \$5.72        |
| 10      | Indonesia   | 469            | 1.6%  | 38               | 0.5%  | \$12.22       |

TABLE 3: TOP 10 EXPORTERS OF LEATHER FOOTWEAR (HS 6403) 2011

| Sr. No. | Country     | USD (millions) | Share | Pairs (millions) | Share | Average Price |
|---------|-------------|----------------|-------|------------------|-------|---------------|
| 1       | China       | 10 854         | 21.2% | 891              | 40.4% | \$12.18       |
| 2       | Italy       | 8 413          | 16.4% | 138              | 6.2%  | \$61.01       |
| 3       | Hong Kong   | 3 750          | 7.3%  | 173              | 7.8%  | \$21.72       |
| 4       | Germany     | 2 554          | 5.0%  | 65               | 3.0%  | \$39.10       |
| 5       | Vietnam     | 2 444          | 4.8%  | 74               | 3.3%  | \$33.06       |
| 6       | Indonesia   | 2 199          | 4.3%  | 129              | 5.9%  | \$17.00       |
| 7       | Belgium     | 2 051          | 4.0%  | 59               | 2.7%  | \$34.88       |
| 8       | Portugal    | 1 824          | 3.6%  | 46               | 2.1%  | \$39.24       |
| 9       | Spain       | 1 758          | 3.4%  | 42               | 1.9%  | \$42.02       |
| 10      | Netherlands | 1 696          | 3.3%  | 46               | 2.1%  | \$36.94       |

TABLE 4: TOP 10 EXPORTERS OF TEXTILE FOOTWEAR (HS 6404) 2011

| Sr. No. | Country     | USD (millions) | Share | Pairs (millions) | Share | Average Price |
|---------|-------------|----------------|-------|------------------|-------|---------------|
| 1       | China       | 7 220          | 44.7% | 1 881            | 71.4% | \$3.84        |
| 2       | Vietnam     | 1 494          | 9.3%  | 143              | 5.4%  | \$10.41       |
| 3       | Belgium     | 987            | 6.1%  | 47               | 1.8%  | \$21.20       |
| 4       | Italy       | 770            | 4.8%  | 27               | 1.0%  | \$28.74       |
| 5       | Germany     | 656            | 4.1%  | 45               | 1.7%  | \$14.62       |
| 6       | Hong Kong   | 586            | 3.6%  | 56               | 2.1%  | \$10.51       |
| 7       | Netherlands | 532            | 3.3%  | 35               | 1.3%  | \$15.28       |
| 8       | Indonesia   | 527            | 3.3%  | 35               | 1.3%  | \$15.18       |
| 9       | Spain       | 527            | 3.3%  | 40               | 1.5%  | \$13.21       |
| 10      | France      | 439            | 2.7%  | 21               | 0.8%  | \$20.43       |

TABLE 5: TOP 10 EXPORTERS OF OTHER FOOTWEAR (HS 6405) 2011

| Sr. No. | Country        | USD (millions) | Share | Pairs (millions) | Share | Average Price |
|---------|----------------|----------------|-------|------------------|-------|---------------|
| 1       | China          | 3 040          | 56.8% | 871              | 77.5% | \$3.49        |
| 2       | Dominican Rep. | 185            | 3.5%  | 29               | 2.6%  | \$6.34        |
| 3       | Italy          | 183            | 3.4%  | 8                | 0.7%  | \$23.61       |
| 4       | Spain          | 170            | 3.2%  | 10               | 0.9%  | \$16.94       |
| 5       | Poland         | 158            | 3.9%  | 14               | 1.3%  | \$10.94       |
| 6       | Portugal       | 137            | 2.6%  | 4                | 0.3%  | \$38.24       |
| 7       | USA            | 134            | 2.5%  | 22               | 2.0%  | \$6.02        |
| 8       | Romania        | 112            | 2.1%  | 6                | 0.6%  | \$17.29       |
| 9       | Vietnam        | 88             | 1.7%  | 10               | 0.9%  | \$9.03        |
| 10      | Germany        | 80             | 1.5%  | 8                | 0.7%  | \$9.67        |

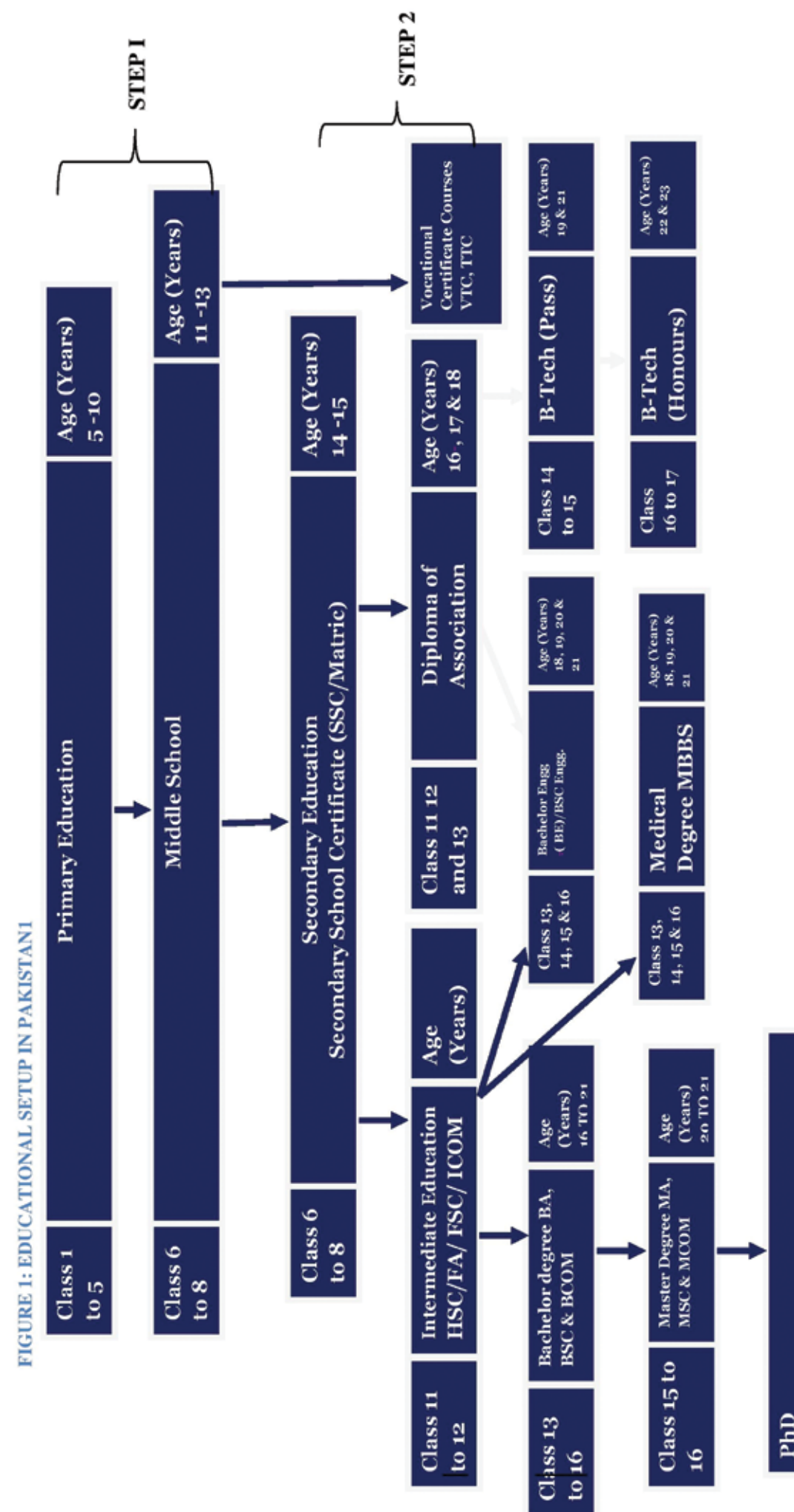


### PAKISTAN'S TECHNICAL AND VOCATIONAL TRAINING SYSTEM

The formal educational system in Pakistan has a multistage structure, of which the first is the primary stage which lasts five years and enrolls 5 to 9 year-olds. The primary system is followed by a three-year middle stage, a two-year secondary stage and a further two-year higher secondary stage, the so-called intermediate stage. Graduation entitles one to continue studies at college and or university level.

For the development of skilled workforce, another stream is technical and vocational education, which is comprised of three years of education after matriculation / 10<sup>th</sup> class and vocational training certificate courses of three- six months, twelve months and eighteen months duration after 8th class or 10th class. These diploma and certificates are offered in almost all technologies for both males and females throughout the country.

The integrated view of education setup is presented through following Figure 1.



<sup>1</sup> Research Study on: *Technical and vocational education in Pakistan at secondary level*, a report by 'National Institute of Science and Technical Education' (June 2009), pp-6



| S. No | Organization Name                | City           | Region         | Contact Person                     | Informal Organizations | Designation        | Contact No.  | Date     | Start Time | End Time |
|-------|----------------------------------|----------------|----------------|------------------------------------|------------------------|--------------------|--------------|----------|------------|----------|
| 1     | Shan Khusa House                 | Toba Tek Singh | Central Punjab | Mr. Muhammad Shaan/ Muhammad Awaiz |                        | Owner              | 0314-5345171 | 26.07.14 | 15:00:00   | 15:40:00 |
| 2     | Sabri Chisti Shoes               | Toba Tek Singh | Central Punjab | Mr. Gulzar                         |                        | Owner              |              | 26.07.14 | 17:40:00   | 18:40:00 |
| 3     | Lucky Shoes                      | Toba Tek Singh | Central Punjab | Mr. Nasrullah                      |                        | Owner              | 0301-7287597 | 26.07.14 | 16:30:00   | 17:20:00 |
| 4     | Sarfraz Shoe Factory             | Toba Tek Singh | Central Punjab | Mr. Sarfraz                        |                        | Skilled Worker     | 0313-7064203 | 27.07.14 | 9:52:00    | 10:58:00 |
| 5     | Sunny Shoes                      | Sargodha       | Central Punjab | Mr. Arshad / Haji Arshad           |                        | Owner              | 0300-8706705 | 27.07.14 | 8:45:00    | 9:30:00  |
| 6     | Ilahi Traders                    | Sargodha       | Central Punjab | Mr. Muhammad Abdur rehman          |                        | Owner              | 0300-2028093 | 07.08.14 | 14:00:00   | 14:40:00 |
| 7     | Red Shoes                        | Sargodha       | Central Punjab | Mr. Muhammad Faizal Arslan         |                        | Owner              | 0321-7974514 | 08.08.14 | 15:00:00   | 15:45:00 |
| 8     | General Shoes                    | Sargodha       | Central Punjab | Mr. Muhammad Yasir                 |                        | Owner              | 0321-6031490 | 07.08.14 | 16:30:00   | 17:10:00 |
| 9     | Liaqat Ali Shoe Factory          | Sargodha       | Central Punjab | Mr. Muhammad Rizwan                |                        | Upper man          | 0307-4288641 | 07.08.14 | 15:10:00   | 15:50:00 |
| 10    | Inayat Shoe Factory              | Sargodha       | Central Punjab | Mr. Nadeem/Iqbal                   |                        | Owner              | 0321-7249703 | 06.08.14 | 14:30:00   | 15:20:00 |
| 11    | Waqas Shoes                      | Sargodha       | Central Punjab | Mr. Muhammad Iqbal                 |                        | Owner              | 0300-6055827 | 05.08.14 | 14:00:00   | 14:45:00 |
| 12    | Tariq Shoe Factory               | Sargodha       | Central Punjab | Mr. Tariq                          |                        | Owner              | 0306-7119505 | 07.08.14 | 19:40:00   | 20:40:00 |
| 13    | Muhammad Nadeem Shoe maker       | Vehari         | South Punjab   | Mr. Muhammad Nadeem                |                        | Owner              | 0303-9500121 | 13.08.14 | 14:45:00   | 15:30:00 |
| 14    | SZ Shoe Maker                    | Vehari         | South Punjab   | Mr. Naiz Ahmed                     |                        | Owner              | 0305-6749240 | 13.08.14 | 13:45:00   | 14:30:00 |
| 15    | Aftab Boot House                 | RWP/ISB        | North Punjab   | Mr. Sajawal Hussain                |                        | Owner              | 0310-5213435 | 05.08.14 | 13:45:00   | 14:35:00 |
| 16    | Hazara Kohati Chapel             | Chawakal       | North Punjab   | Mr. Sajawal Hussain                |                        | Owner              | 0307-5689807 | 22.08.14 | 10:40:00   | 11:35:00 |
| 17    | Sargodha Kohati Chapel           | Chawakal       | North Punjab   | Mr. Taswar Hussain                 |                        | Owner              | 0308-5600559 | 22.08.14 | 11:58:00   | 12:50:00 |
| 18    | Saleem Kohati Chapel             | Chawakal       | North Punjab   | Mr. Saleem Khan                    |                        | Business Owner     | 0336-5944154 | 22.08.14 | 13:30:00   | 14:20:00 |
| 19    | Rashid Kohati Chapel             | Gujrat         | North Punjab   | Mr. Rashid                         |                        | Owner              |              | 22.08.14 | 16:15:00   | 17:00:00 |
| 20    | Leather Shoes Variety            | Gujrat         | North Punjab   | Mr. Khuram Shehzad                 |                        | Owner              | 053-5939409  | 22.08.14 | 17:25:00   | 18:30:00 |
| 21    | Kashmir Chapel                   | Gujrat         | North Punjab   | Mr. Asghar But                     |                        | Owner              | 0311-4305551 | 22.08.14 | 15:21:00   | 16:30:00 |
| 22    | Waqar Kohati Chapel              | Gujrat         | North Punjab   | Mr. Waqar BUTT                     |                        | Owner              | 0306-6619260 | 23.08.14 | 10:00:00   | 10:50:00 |
| 23    | Juma Khan Chapel                 | Gujrat         | North Punjab   | Mr. Abid Shehzad                   |                        | Owner              | 0300-6205500 | 23.08.14 | 8:49:00    | 9:49:00  |
| 24    | Abid Chapel Store                | Gujrat         | North Punjab   | Mr. Juma Khan                      |                        | Owner              | 0306-8625182 | 23.08.14 | 11:31:00   | 12:55:00 |
| 25    | Ghulam Masood Chapel             | Gujrat         | North Punjab   | Mr. Ghulam Market                  |                        | Owner              | 0331-6259759 | 23.08.14 | 13:12:00   | 14:55:00 |
| 26    | Sethi Shoes                      | Gujrat         | North Punjab   | Mr. Shezad Ahmed                   |                        | Designer           | 0303-6029702 | 23.08.14 | 15:44:00   | 16:45:00 |
| 27    | Classic Chapel Store             | Jhelum         | North Punjab   | Mr. Abdul Chafor                   |                        | Owner              | 0321-5432032 | 23.08.14 | 11:53:00   | 12:39:00 |
| 28    | Shaan Footwear                   | Mianwali       | North Punjab   | Mr. Muhammad Nazir                 |                        | Owner              | 0306-7809762 | 25.08.14 | 12:22:00   | 13:11:00 |
| 29    | Ghulam Mustafa shoe maker        | Sahiwal        | South Punjab   | Mr. Muhammad Mustafa               |                        | Owner              | 0305-6451107 | 30.08.14 | 9:23:00    | 10:10:00 |
| 30    | Amir Shoes                       | Sahiwal        | South Punjab   | Mr. Muhammad Amir                  |                        | Owner              | 0314-6972002 | 30.08.14 | 10:40:00   | 11:40:00 |
| 31    | Babar Muneer Shoes               | Sahiwal        | South Punjab   | Mr. Babar Muneer                   |                        | Owner              | 0312-7790422 | 30.08.14 | 10:30:00   | 11:25:00 |
| 32    | Malik Shoes                      | Sahiwal        | South Punjab   | Mr. Abbas Haider                   |                        | Owner              | 0323-4394763 | 30.08.14 | 13:10:00   | 14:50:00 |
| 33    | Suffa Leather                    | Sialkot        | North Punjab   | Mr. Mr. Mubashir                   |                        | Owner              | 0300-9614673 | 28.08.14 | 15:30:00   | 16:20:00 |
| 34    | Yaqoob Shoes                     | Sialkot        | North Punjab   | Mr. Muhammad Sohail Anwar          |                        | Partner            | 052-3556342  |          |            |          |
| 35    | Butt Footwear                    | Sialkot        | North Punjab   | Mr. Nazim                          |                        | Director Marketing | 0321-861454  | 28.08.14 | 16:50:00   | 17:45:00 |
| 36    | Gul Khan Peshaweri Chapel market | Sialkot        | North Punjab   | Mr. Dil Jaan Khan Afridi           |                        | Owner              | 0300-6425059 | 26.08.14 | 12:00:00   | 13:00:00 |
| 37    | Abbas Khan Afridi Chapel         | Sialkot        | North Punjab   | Mr. Abbas Khan Afridi              |                        | Owner              | 0300-7136136 | 25.08.14 | 16:45:00   | 17:40:00 |
| 38    | Sikandar Shoes                   | Sialkot        | North Punjab   | Mr. Sikandar Ali                   |                        | Owner              | 0300-6157225 | 25.08.14 | 13:10:00   | 16:15:00 |
| 39    | Soni Shoes                       | DG Khan        | South Punjab   | Mr. Shahzad Yousaf                 |                        | Owner              | 0321-6781224 | 17.08.14 | 9:00:00    | 9:43:00  |
| 40    | New Sufi shoes                   | DG Khan        | South Punjab   | Haji Muhammad Yaseen               |                        | Owner              | 0343-6106561 | 17.08.14 | 9:40:00    | 10:42:00 |
| 41    | Shahzad Shoe Factory             | Faisalabad     | Central Punjab | Mr. Shahzad                        |                        | Owner              | 0314-3551041 | 23.07.14 | 12:00:00   | 12:40:00 |
| 42    | Al Rehman Shoe Company           | Faisalabad     | Central Punjab | Mr. Abdul Rehman                   |                        | Owner              | 0300-8666922 | 23.07.14 | 15:30:00   | 16:15:00 |
| 43    | Shehzad Bhui Shoes               | Multan         | South Punjab   | Mr. Muhammad Asif                  |                        | Worker             | 0313-0626286 | 16.08.14 | 15:30:00   | 16:10:00 |
| 44    | Bhatti Brothers Khusa Makers     | Multan         | South Punjab   | Mr. Bashir Bhatti                  |                        | Owner              | 0300-6322960 | 16.08.14 | 9:10:00    | 9:55:00  |
| 45    | Liberty Shoes Store              | Multan         | South Punjab   | Mr. Muhammad Tariq                 |                        | Owner              | 0307-6668855 | 16.08.14 | 18:10:00   | 18:55:00 |
| 46    | Haji Hanif Shoe Maker            | Multan         | South Punjab   | Mr. Muhammad Hanif                 |                        | Bottom Man         | 0342-8671511 | 16.08.14 | 11:50:00   | 13:10:00 |
| 47    | Ashraf Shoe Maker                | Multan         | South Punjab   | Mr. Muhammad Ashraf Khan           |                        | Upper man          | 0300-7329414 | 16.08.14 | 11:30:00   | 12:10:00 |
| 48    | Ifthar Shoes Maker               | Multan         | South Punjab   | Mr. Nadeem                         |                        | Fore man           | 0303-7642816 | 18.08.14 | 16:30:00   | 17:17:00 |
| 49    | Javed Shoes Maker                | Multan         | South Punjab   | Mr. Muhammad Irfan                 |                        | Bottom Man         | 0300-6331511 | 18.08.14 | 17:40:00   | 18:22:00 |
| 50    | Al Faisal Shoes Store            | Multan         | South Punjab   | Sh. Wajid Ali                      |                        | Owner              | 061-4546422  | 17.08.14 | 9:30:00    | 10:30:00 |

| S. No | Organization Name         | City        | Region         | Contact Person              | Informal Organizations | Designation        | Contact No.  | Date     | Start Time | End Time |
|-------|---------------------------|-------------|----------------|-----------------------------|------------------------|--------------------|--------------|----------|------------|----------|
| 51    | Usman Shoes Store         | Multan      | South Punjab   | Mr. Usman                   |                        | Owner              | 0301-6679268 | 18.08.14 | 16:50:00   | 17:25:00 |
| 52    | Manzoor Shoes             | Multan      | South Punjab   | Ch. Talha                   |                        | Owner              | 034-6194343  | 18.08.14 | 18:40:00   | 19:30:00 |
| 53    | Aziz Manufacturers        | Sahiwal     | South Punjab   | Mr. Abdul Aziz              |                        | Owner              | 0310-6165218 | 30.08.14 | 11:55:00   | 12:40:00 |
| 54    | Sajjad Shoes              | Sahiwal     | South Punjab   | Mr. Sajjad Ahmed            |                        | Owner              | 0345-4384494 | 30.08.14 | 13:30:00   | 14:20:00 |
| 55    | Sheikh shoes Manufacturer | Sahiwal     | South Punjab   | Mr. Sheikh M                |                        | Owner              | 0301-6533656 | 30.08.14 | 16:00:00   | 16:50:00 |
| 56    | Pasha (Pvt.) Ltd.         | Sahiwal     | South Punjab   | Mr. M.Amin Pasha            |                        | Chief Exporter     | 0321-4068880 | 26.08.14 | 14:00:00   | 15:10:00 |
| 57    | Tracker Plus shoes        | Sahiwal     | South Punjab   | Mr. M.Nadeem                |                        | Owner of Kharkhana | 0300-6903708 | 30.08.14 | 10:00:00   | 10:35:00 |
| 58    | Sagar Karkhana            | Sahiwal     | South Punjab   | Mr. M. Sagar                |                        | Owner              | 0342-7880068 | 30.08.14 | 10:50:00   | 11:30:00 |
| 59    | Akber Khusa House         | Bhawalnagar | South Punjab   | Mr. Ghulam Akber            |                        | Owner              |              | 28.08.14 | 16:00:00   | 16:50:00 |
| 60    | Aslam Shoes               | Bahawalpur  | South Punjab   | Mr. M. Khalid Aslam         |                        | Owner              | 0344-7205321 | 28.08.14 | 19:00:00   | 19:50:00 |
| 61    | Chaudary Super House      | Bahawalpur  | South Punjab   | Mr. Arshad                  |                        | Owner              | 0344-7162252 | 28.08.14 | 17:30:00   | 18:20:00 |
| 62    | Kashif Khusa Mehal        | Bahawalpur  | South Punjab   | Mr. Ghulam Muhammad         |                        | Owner              | 0301-7780796 | 28.08.14 | 11:10:00   | 13:00:00 |
| 63    | Punjab Boots              | Bahawalpur  | South Punjab   | Mr. Ch. Khalid              |                        | Owner              | 0312-7773250 | 28.08.14 | 8:30:00    | 9:45:00  |
| 64    | Choice Boots              | Bahawalpur  | South Punjab   | Mr. Adeel                   |                        | Factory Manager    | 0300-6308191 | 28.08.14 | 14:00:00   | 14:55:00 |
| 65    | Fareed Shoes              | Kasur       | Central Punjab | Mr. Tahir Maqsood Ahmed     |                        | Owner              | 0321-7725626 | 24.08.14 | 14:43:00   | 16:28:00 |
| 66    | Star Shoes                | Kasur       | Central Punjab | Mr. Haji Aslam              |                        | Owner              | 0300-7571686 | 24.08.14 | 12:38:00   | 14:00:00 |
| 67    | Kohat Shoes               | Kasur       | Central Punjab | Mr. M. Sadiq                |                        | Owner              | 0321-6583173 | 24.08.14 | 10:00:00   | 10:45:00 |
| 68    | Aslam Shoes               | Kasur       | Central Punjab | Mr. Haji M. Aslam           |                        | Owner              | 0300-6591916 | 24.08.14 | 11:11:00   | 12:03:00 |
| 69    | JOJO Shoes                | Kasur       | Central Punjab | Mr. M.Rizwan                |                        | Owner              | 0321-7724954 | 24.08.14 | 17:04:00   | 17:40:00 |
| 70    | Vanika Shoes              | Kasur       | Central Punjab | Mr. M.Sadiq                 |                        | Owner              | 0300-6528740 | 24.08.14 | 20:30:00   | 21:15:00 |
| 71    | Sakina Shoes              | Kasur       | Central Punjab | Mr. Liaqat Ali              |                        | Owner              | 0307-4252173 | 24.08.14 | 20:30:00   | 21:15:00 |
| 72    | Collection shoes          | Kasur       | Central Punjab | Mr. M. Naveed               |                        | Owner              | 0321-1751460 | 24.08.14 | 18:52:00   | 20:00:00 |
| 73    | Master Shoes              | Gujranwala  | Central Punjab | Mr. M. Ashaq                |                        | Owner              |              | 31.08.14 | 14:40:00   | 15:45:00 |
| 74    | London Shoes              | Gujranwala  | Central Punjab | Mr. Chaoudry Ghulam Hussain |                        | Owner              | 0347-6120058 | 24.08.14 | 12:00:00   | 13:10:00 |
| 75    | Staar Footwear            | Gujranwala  | Central Punjab | Mr. M. Waseem               |                        | Owner              | 0300-6421347 | 29.08.14 | 18:43:00   | 19:50:00 |
| 76    | Sapna Shoes               | Gujranwala  | Central Punjab | Mr. M. Asif                 |                        | Owner              | 0300-7469194 | 28.08.14 | 7:30:00    | 8:30:00  |
| 77    | Hina Shoes                | Gujranwala  | Central Punjab | Mr. Ch. Abdul Majid         |                        | Owner              | 0300-6445031 | 24.08.14 | 12:25:00   | 13:15:00 |
| 78    | Dawood Shoes              | Gujranwala  | Central Punjab | Mr. M. Boot                 |                        | Owner              | 0300-7409939 | 29.08.14 | 11:10:00   | 12:12:00 |
| 79    | Aslam Shoes               | Gujranwala  | Central Punjab | Mr. M. Aslam Bhutta         |                        | Owner              | 0300-6591916 | 31.08.14 | 12:50:00   | 13:50:00 |
| 80    | SM Shoes                  | Gujranwala  | Central Punjab | Mr. Shamshad Khan           |                        | Owner              | 0300-6493398 | 30.08.14 | 15:17:00   | 16:35:00 |
| 81    | Candy Shoes               | Gujranwala  | Central Punjab | Mr. Tariq Bashir Awan       |                        | Owner              | 0554233235   | 30.08.14 | 16:56:00   | 17:58:00 |
| 82    | Javed Fancy Shoes         | Gujranwala  | Central Punjab | Mr. M. Javed Shafi          |                        | Owner              | 0322-5633762 | 30.08.14 | 19:29:00   | 20:29:00 |
| 83    | Foot fit                  | Lahore      | Central Punjab | Mr. Muhammad Tariq Shakkor  |                        | Owner              | 0321-8461123 | 26.08.14 | 16:20:00   | 17:02:00 |
| 84    | Doctor Shoes              | Lahore      | Central Punjab | Mr. Nazar                   |                        | CEO                | 0315-5878417 | 11.08.14 | 16:10:00   | 16:57:00 |
| 85    | Naveed Shoes              | Lahore      | Central Punjab | Mr. Naveed Riaz             |                        | Owner              | 0321-2120038 | 12.08.14 | 18:15:00   | 20:04:00 |
| 86    | Khurram Shoes             | Lahore      | Central Punjab | Mr. M. Khurram              |                        | Owner              | 0323-6674655 | 12.08.14 | 14:20:00   | 16:00:00 |
| 87    | Super shoes               | Lahore      | Central Punjab | Mr. Nadeem Ahmad            |                        | Owner              | 0323-4994750 | 27.08.14 | 11:00:00   | 12:00:00 |
| 88    | Shariq shoes              | Lahore      | Central Punjab | Mr. M. Shariq               |                        | Owner              | 0300-2120217 | 13.08.14 | 14:10:00   | 16:00:00 |
| 89    | Comfort Shoes             | Lahore      | Central Punjab | Mr. Main Waqas              |                        | Owner              |              | 26.08.14 | 12:29:00   | 13:46:00 |
| 90    | Stylo Chapal              | Lahore      | Central Punjab | Mr. Iqtadar Hussain         |                        | Owner              | 0321-7775018 | 27.08.14 | 19:26:00   | 20:18:00 |
| 91    | Step One                  | Lahore      | Central Punjab | Mr. Sohail Ahmed            |                        | Owner              |              | 27.08.14 | 15:31:00   | 16:23:00 |
| 92    | Khalid Shoes              | Lahore      | Central Punjab | Mr. Khalid                  |                        | Owner              | 0321-8847904 | 20.08.14 | 12:27:00   | 13:27:00 |
| 93    | Mujahid Shoes             | Lahore      | Central Punjab | Mr. Mujahid                 |                        | Owner              | 0322-4416027 | 16.08.14 | 18:00:00   | 18:40:00 |
| 94    | Sana Enterprises          | Lahore      | Central Punjab | Mr. Muhammad Nadeem         |                        | Owner              | 0323-4058277 | 26.08.14 | 15:10:00   | 15:50:00 |
| 95    | Good Shoes                | Lahore      | Central Punjab | Mr. Arshad                  |                        | Owner              | 0300-4193144 | 25.08.14 | 16:37:00   | 18:00:00 |
| 96    | Chan Mali shoes           | Lahore      | Central Punjab | Mr. Ayaz                    |                        | Owner              | 0321-4268661 | 27.08.14 | 17:29:00   | 18:10:00 |
| 97    | Khurram Shoes             | Lahore      | Central Punjab | Mr. M. Khurram              |                        | Owner              | 0323-6674655 | 12.08.14 | 14:20:00   | 16:00:00 |
| 98    | Sitara Footwear           | Lahore      | Central Punjab | Mr. M. Waseem               |                        | Owner              | 0300-6421847 | 28.08.14 | 18:43:00   | 19:50:00 |
| 99    | Shahzad shoes             | Lahore      | Central Punjab | Mr. M. Shahzad              |                        | Owner              | 0300-8120217 | 13.08.14 | 14:10:00   | 16:00:00 |
| 100   | Valika Shoes              | RWP/ISB     | North Punjab   | Mr. Shiekh Imam             |                        | Owner              | 0321-5343521 | 05.08.14 | 14:59:00   | 15:43:00 |



| Organization Name |                             |                | Formal Organizations     |                      |   |          |            |          |
|-------------------|-----------------------------|----------------|--------------------------|----------------------|---|----------|------------|----------|
| S. No             | City                        | Region         | Contact Person           | Designation          | Contact No  | Date     | Start Time | End Time |
| 1                 | Toba Tek Singh              | Central Punjab | Mr. Noman Yawar          | Owner                | 0311-6565658  | 26.07.14 | 14:10:00   | 14:50:00 |
| 2                 | Toba Tek Singh              | Central Punjab | Mr. Farooq               | Accounts Manager     | 046-35107151  | 26.07.14 | 16:00:00   | 16:56:00 |
| 3                 | Sargodha                    | Central Punjab | Mr. Khawaja Farooq       | CEO                  | 0300-9605601  | 06.08.14 | 15:50:00   | 16:30:00 |
| 4                 | Tahir Shoes                 | Central Punjab | Mr. Muhammad Sarfaraz    | Skilled Worker       | 0300-6022353  | 08.08.14 | 17:15:00   | 18:00:00 |
| 5                 | Hush Puppies                | Central Punjab | Mr. Khurram              | Head of HR           | 0303-4440622  | 11.08.14 | 17:00:00   | 18:05:00 |
| 6                 | Four Seasons Footwear       | Central Punjab | Haji Mohammad Rafiq      | CEO                  | 0321-4032436  | 12.08.14 | 14:05:00   | 15:00:00 |
| 7                 | Gonila Inter sale Pvt Ltd.  | Central Punjab | Mr. M. Zia -Ullah        | CFO                  | 0322-6309999  | 13.08.14 | 13:00:00   | 14:00:00 |
| 8                 | Trust Shoes                 | Central Punjab | Mr. Ayes Khan            | Owner                | 0321-8444987  | 14.08.14 | 14:35:00   | 15:45:00 |
| 9                 | Royal Shoes                 | Central Punjab | Mr. Tariq Javed          | Manager              | 042-37602822,<br>0300-8860054,<br>0300-4739203            | 18.08.14 | 12:00:00   | 13:00:00 |
| 10                | Sartaj Shoes                | Central Punjab | Mr. Saleem Ahmed         | Manager              | 0321-4513845  | 20.08.14 | 13:50:00   | 15:00:00 |
| 11                | Simbu Enterprises Pvt. Ltd. | Central Punjab | M. Afzal                 | MD                   | 042-37572940,<br>042-37552171                             | 18.08.14 | 14:00:00   | 15:15:00 |
| 12                | Elegant (Pvt) Ltd.          | Central Punjab | Mr. Nasir Anwar          | Owner                | 0334-8401000  | 19.08.14 | 10:30:00   | 12:00:00 |
| 13                | Ashar Elahi Footwear        | Central Punjab | Mr. M. Zafar Ayub        | Factory Incharge     | 0301-4155881  | 20.08.14 | 11:50:00   | 13:05:00 |
| 14                | Stylo                       | Central Punjab | Mr. Arshad               | GM                   | 0322-8447972  | 21.08.14 | 11:00:00   | 12:30:00 |
| 15                | S.S Footwear                | Central Punjab | Mr. Anwer Ahmad          | Production manager   | 042-35909800  | 21.08.14 | 9:30:00    | 10:40:00 |
| 16                | Lala Shoes Maker            | Central Punjab | Mr. M. Ashraf            | Owner                | 0321-4652443  | 22.08.14 | 14:43:00   | 16:00:00 |
| 17                | Haji Mehmood Shoes          | Central Punjab | Mr. Allih Dutta          | Owner                | 0322-4312873  | 22.08.14 | 18:13:00   | 18:55:00 |
| 18                | Roots Shoes                 | Central Punjab | Mr. Qusim/ Mr. Aqeel     | Production manager   | 0343-4672734  | 25.08.14 | 17:27:00   | 18:25:00 |
| 19                | Shoe Shop                   | Central Punjab | Mr. Babar                | Owner                | 0333-4830548  | 15.08.14 | 14:00:00   | 14:41:00 |
| 20                | Zafar Shoes                 | Central Punjab | Mr. Zafar Iqbal          | Owner                | 0345-4347770  | 16.08.14 | 16:36:00   | 17:30:00 |
| 21                | Adler Shoes                 | Central Punjab | Mr. Abdul Sattar Ansari  | Owner                | 042-37358888,<br>042-37357777,0 42-37225287               | 15.08.14 | 19:51:00   | 21:10:00 |
| 22                | SA Shoes                    | Central Punjab | Mr. M. Arshad            | Owner                | 0321-9566255  | 15.08.14 | 16:17:00   | 17:08:00 |
| 23                | Lark & Finch                | Central Punjab | Mr. Omer Qadir           | BM                   | 0302-8486585  | 18.08.14 | 16:45:00   | 17:35:00 |
| 24                | Cairo Shoes                 | Central Punjab | Mr. Salman Talib         | CEO                  | 0321-4876376  | 25.08.14 | 16:00:00   | 17:00:00 |
| 25                | Brothers Association        | Central Punjab | Mr. Hamid Mehmood        | Manager HR           | 0333-4201437  | 26.08.14 | 13:20:00   | 14:00:00 |
| 26                | Hermis Footwear             | Central Punjab | Mr. M. ishtiaq           | Head of Accounts     | 0321-8800437  | 27.08.14 | 19:00:00   | 19:50:00 |
| 27                | Simbu Shoes                 | Central Punjab | Mr. Main Akhtar Bashir   | Partner              | 042-37467303  | 25.08.14 | 8:20:00    | 9:25:00  |
| 28                | Shafi Pvt Ltd               | Central Punjab | Mr. Tariq Mehmood        | Head of HR           | 042-37970638, 042-37970641,<br>042-37970640, 042-37970639 | 19.08.14 | 11:20:00   | 12:30:00 |
| 29                | Shoes Channel               | Central Punjab | Mr. Umair Khan           | Manager              | 0321-4554755  | 25.08.14 | 11:30:00   | 12:15:00 |
| 30                | Service Shoes               | Central Punjab | Mr. Qadeer Ahmed Vaseen  | GM                   | 0301-4445645  | 26.08.14 | 12:00:00   | 13:00:00 |
| 31                | Saga Industries             | North Punjab   | Mr. Rahel                | Owner                | 0300-7106530  | 29.08.14 | 9:50:00    | 10:30:00 |
| 32                | Koja Industries             | North Punjab   | Mr. Ayaz Hussain         | Director Sales       | 052-36149480  | 27.08.14 | 15:30:00   | 16:15:00 |
| 33                | Raja Industries Pvt Limited | North Punjab   | Mr. usman Khan           | Advisor              | 0300-6136176  | 27.08.14 | 10:00:00   | 10:55:00 |
| 34                | Seven Star Shoes            | North Punjab   | Mr. Muzamil Hussain Shah | Business Partner     | 0346-6745213  | 26.08.14 | 17:20:00   | 18:10:00 |
| 35                | Haroon Shoes                | Central Punjab | Mr. Muhammad Yaseen      | Owner                | 041-2637867   | 23.07.14 | 16:00:00   | 16:40:00 |
| 36                | HB Shoes                    | Central Punjab | Mr. Bilal Saeed          | Owner                | 0304-9801258  | 24.07.14 | 18:00:00   | 18:50:00 |
| 37                | Raja Rani Shoes             | Central Punjab | Mr. Arslan Waqar         | Owner                | 041-8531126   | 23.07.14 | 14:00:00   | 14:40:00 |
| 38                | Sheroze Shoes Factory       | Central Punjab | Mr. Ashiq Hussain        | Owner                | 0300-8587851  | 24.07.14 | 16:45:00   | 17:30:00 |
| 39                | Khawaja shoes Pvt Ltd       | South Punjab   | Mr. Anjad Pasha Butt     | Admin Manager        | 0302-7448410  | 16.08.14 | 13:00:00   | 13:40:00 |
| 40                | Haji Akram Shoe Maker       | South Punjab   | Mr. Abbas                | Fore man             | 0300-7861272  | 18.08.14 | 18:10:00   | 18:55:00 |
| 41                | Standard Footwear           | Central Punjab | Mr. Asad Naqvi           | General Manager - Pr | 042-36305490, 0321-4001255                                | 27.08.14 | 9:30:00    | 10:30:00 |
| 42                | Sigma Footwear              | Central Punjab | Mr. Liaquat Ali          | Owner                | 0333-4429913  | 27.08.14 | 14:00:00   | 15:15:00 |
| 43                | Footlib (Pvt.) Limited      | Central Punjab | Mr. Abdul Mannan         | Designer             | 049-4540325-7   | 27.08.14 | 11:35:00   | 12:45:00 |
| 44                | Universal Footwear          | Central Punjab | Mr. Nisar Pasha          | CEO                  | 042-37722522  | 27.08.14 | 15:40:00   | 16:30:00 |
| 45                | English Shoe Store          | Central Punjab | Mr. M. Rizwan Khan       | CEO                  | 042-36305005  | 23.08.14 | 13:00:00   | 14:00:00 |
| 46                | Daniyal Industries          | Central Punjab | Mr. Riaz Mahile Paracher | Manager              | 0321-4384931  | 28.08.14 | 13:00:00   | 14:15:00 |
| 47                | Relaxo Pvt Ltd.             | Central Punjab | Mr. Muhammad Azam        | CEO                  | 0300-8408251  | 13.08.14 | 11:10:00   | 12:00:00 |

| Footwear Training Providers in Punjab |  |                            |                                |            |   |
|---------------------------------------|--|----------------------------|--------------------------------|------------|---|
| Serial No.                            | Name of Facility   | Contact Person Name        | Designation                    | City       | Contact   |
| 1                                     | Govt. Institute of Leather Technology                          | Syed Athar Zaidi           | Project Manager                | Gujranwala | P.O Anwar Industry G.T.Road, Gujranwala,<br><a href="mailto:princepelgetgrw@yahoo.com">princepelgetgrw@yahoo.com</a><br>085-9230056<br>085-9201351                      |
| 2                                     | Pakistan Institute of Fashion & Design                         | Mr. Imran Mehmood          | Course Coordinator             | Lahore     | 51-J/3, Johar Town, Lahore, Pakistan<br><a href="mailto:imran.nifa@gmail.com">imran.nifa@gmail.com</a><br>042-3532401-08  |
| 3                                     | Bata Pakistan Limited  | Mr. Mohammad Anwar ul' Haq | Head of HR                     | Lahore     | G.T. Road, Bata Pur<br><a href="mailto:anwar.siddiqui@bata.com">anwar.siddiqui@bata.com</a><br>042- 111- 044-055  |
| 4                                     | Footwear Training Institute Charsadda (FTIC)                   | Mr. Fazal Amin Jan         | Principal                      | Peshawar   | Charsadda, KPK<br><a href="mailto:fazalminian@gmail.com">fazalminian@gmail.com</a><br>091-6514341   |
| 5                                     | University of Management Technology School of Textile & Design | Mr. Nabeel Amin            | Director / Associate Professor | Lahore     | C-11, Johar Town, Lahore<br><a href="mailto:std_dir@umt.edu.pk">std_dir@umt.edu.pk</a> ,<br><a href="mailto:nabeel@umt.edu.pk">nabeel@umt.edu.pk</a><br>042-35322801-10 |



| Sector Expert List |   |                                    |  |   |                              |
|--------------------|---|------------------------------------|--|---|------------------------------|
| S.No               | Company Name  | Contact Person Name                | Designation  | Contact No  | Interview Conducted by       |
| 1                  | Service Industries Ltd                                      | Mr. Jawwad Faisal                  | CEO  | (042) 3571 0593, 35711827   | Sadar Rajput                 |
| 2                  | Firhaz Footwear (Hush Puppies)                              | Mr. Farrukh Salim                  | CEO/Director   | 0300 846 0095   | Sadar Rajput                 |
| 3                  | Global Enterprise   | Mr. Tanvir Ahmed                   | Managing Partner                                     | 0300/0321 848 8531, (042) 3714 8734                                 | Sadar Rajput                 |
| 4                  | Stylo Shoes   | Mr. Javed Siddique                 | CEO  | 0322 50010010   | Sadar Rajput                 |
| 5                  | Sigma Footwear  | Mr. Liaqat Ali                     | Proprietor   | 042-37725313 / 0333-4429913   | Sadar Rajput/ Zeeshan Bharti |
| 6                  | Siddiq Leather  | Mr. Javed Siddiqui                 | CEO  | (042) 37970477  | Sadar Rajput/ Zeeshan Bharti |
| 7                  | Epcot   | Main Rizwan                        | CEO  | 0320-2721151  | Sadar Rajput                 |
| 8                  | Elegant   | Mr. Nasir Sheikh                   | CEO  | 0322 453 00 00  | Sadar Rajput                 |
| 9                  | Pakistan Institute Of Fashion Design                        | Ms. Hina Turyeba                   | Vice Chancellor                                      | 042-35315401-08   | Sadar Rajput                 |
| 10                 | Lahore Chamber Of Commerce And Industry                     | Mr. Mian Muhammad Afzal            | Executive Committee Member (Footwear & Leather)      | 111-222-499, 42 36304634, Ext. 301                                  | Sadar Rajput                 |
| 11                 | SMEDA - Lahore  | Mr. Ashfaq Ahmed & Mr. Javed Afzal | DGM & Manager (Experts of Leather & Footwear Sector) | 042-111-111-456   | Sadar Rajput                 |
| 12                 | SMEDA - Sialkot   | Mr. Fouzan Muhammad                | Manager  | 052-4291881-2   | Nusikullah                   |
| 13                 | Pakistan Footwear Manufacturers Association - PFMa Chairman | Mr. Javed Iqbal                    | Senior Vice Chairman                                 | 0300 849 2010, (042) 3573 2599                                      | Sadar Rajput                 |
| 14                 | Bata  | Mohammad Anwar ul Haq              | Head of HR   | 042- 111- 044-055   | Sadar Rajput                 |
| 15                 | TEVTA   | Mr. Iftikhar Hussain Shah          | Director - Research and Development                  | 042-99268058  | Sadar Rajput                 |
| 16                 | National College Of Arts                                    | Prof. Dr. Murtaza Jafri            | Principal  | (042) 99210601  | Sadar Rajput                 |
| 17                 | Multan Hide Company (Pvt) Ltd.                              | Mr. Abdul hameed Sheikh            | Director   | 061-4510361   | Nusikullah                   |
| 18                 | East Pakistan Chrome Tannery                                | Mr. Nadeem Baig                    | Factory Head   | 3575 6190, (042) 3575 6181- 83<br>042-35756181 - Fax : 042-35756194 | Zeeshan Bharti               |
| 19                 | Sartaj Shoes  | Mr. Zahid Ahmed Khan               | CEO  | 0321 840 3874   | Sadar Rajput/ Zeeshan Bharti |
| 20                 | Trust Shoes International (Pvt) Ltd                         | Mr. Muhammad Ayub Khan             | CEO  | 0321 844 4987   | Sadar Rajput/ Zeeshan Bharti |
| 21                 | Ashraf Khatri (Free Lance Footwear Expert)                  | Mr. Ashraf Khatri                  | Free Lance Footwear Expert                           | 0092 3004575118   | Batool Shirazi               |
| 22                 | Raja Industries (Pvt) Ltd.                                  | Mr. Usman Khan                     | Advisor  | 0300-6136176  | Nusikullah                   |
| 23                 | Sialkot Chamber Of Commerce And Industry                    | Main Muhammad Anwar                | Senior Vice President                                | 0321-6111212  | Nusikullah                   |
| 24                 | Aaa Leatherworks  | Mr. Abid Raza                      | CEO  | 3234524529  | Zeeshan Bharti               |
| 25                 | Pasari International  | Mr. Muthaib Shafique Pasari        | CEO  | 042-35850374/35850378/35837534/03008416365                          | Zeeshan Bharti               |

## FOOTWEAR SURVEY QUESTIONNAIRE

## FOOTWEAR SURVEY QUESTIONNAIRE

## COMPANY'S GENERAL INFORMATION

|                       |  |  |  |  |  |     |  |  |  |  |  |
|-----------------------|--|--|--|--|--|-----|--|--|--|--|--|
| Company Name          |  |  |  |  |  |     |  |  |  |  |  |
| Address Line 1        |  |  |  |  |  |     |  |  |  |  |  |
| Address Line 2        |  |  |  |  |  |     |  |  |  |  |  |
| Address Line 3        |  |  |  |  |  |     |  |  |  |  |  |
| City                  |  |  |  |  |  |     |  |  |  |  |  |
| District              |  |  |  |  |  |     |  |  |  |  |  |
| Phone                 |  |  |  |  |  | Fax |  |  |  |  |  |
| Company Email         |  |  |  |  |  |     |  |  |  |  |  |
| Company Website       |  |  |  |  |  |     |  |  |  |  |  |
| Year Of Establishment |  |  |  |  |  |     |  |  |  |  |  |

## RESPONDENTS'S INFORMATION

|                              |        |  |  |  |  |  |       |  |  |  |
|------------------------------|--------|--|--|--|--|--|-------|--|--|--|
| Respondent's Name            |        |  |  |  |  |  |       |  |  |  |
| Designation / Job Title      |        |  |  |  |  |  |       |  |  |  |
| Qualification                |        |  |  |  |  |  |       |  |  |  |
| No of Years with The Company |        |  |  |  |  |  |       |  |  |  |
| Contact Details              | Mobile |  |  |  |  |  | Email |  |  |  |

## INTERVIEWER'S INFORMATION

|                      |  |  |  |  |  |  |                    |  |  |  |
|----------------------|--|--|--|--|--|--|--------------------|--|--|--|
| Interviewer's Name   |  |  |  |  |  |  |                    |  |  |  |
| Date                 |  |  |  |  |  |  |                    |  |  |  |
| Interview Start Time |  |  |  |  |  |  | Interview End Time |  |  |  |



## SECTION A

## FIRMOGRAPHICS

**QA1.** What is the average annual sales turnover of your company? (SHOW CARD "A")

| Company Size | Annual Sales Turnover (Rs.)       | Code |
|--------------|-----------------------------------|------|
| Micro        | Less than 1 Million               | 1    |
| Small        | 1 Million – 10 Million            | 2    |
| Medium       | 11 Million - 30 Million           | 3    |
| Large        | 31 Million – 50 Million and above | 4    |

**QA2.** Which of the following types of footwear items are manufactured here? (SHOW CARD "B")

| Type of Products/Articles/Business Model       | Code |
|--|------|
| Outer Soles - Leather                          | 1    |
| Outer Sole - Rubber                            | 2    |
| Outer Soles – Plastic / Synthetic              | 3    |
| Upper - Leather                                | 4    |
| Upper - Rubber                                 | 5    |
| Upper – Plastic / Synthetic                    | 6    |
| Upper – Textile                                | 7    |
| Inner Soles                                    | 8    |
| Slippers /Slip Ons / Flip Flop / Hawai Chappal | 9    |
| Sandles  | 10   |
| Shoes  | 11   |
| Joggers / Sports Shoes                         | 12   |
| Men's Shoes                                    | 13   |
| Ladies Shoes                                   | 14   |
| Children Shoes                                 | 15   |
| Army / Institutional Shoes                     | 16   |
| Safety Shoes                                   | 17   |
| Rubber Boots                                   | 18   |
| Leather Boots                                  | 19   |
| Others 1 (Please Specify)                      |      |
| Others 2                                       |      |
| Others 3                                       |      |

**QA3.** On an average how many pairs of shoes / slippers / sandals/footwear articles are produced each year? (SHOW CARD "C")

| Company Size | Number of Pairs/Articles Produced Annually | Code |
|--------------|--|------|
| Micro        | Up to 10,000                               | 1    |
| Small        | 10001- 30000                               | 2    |
| Medium       | 30001- 60000                               | 3    |
| Large        | More than 60000                            | 4    |

**QA4a.** Are you into retail business?

|     |   |
|-----|---|
| Yes | 1 |
| No  | 2 |

**QA4b.** Are you an exporter?

|     |   |                 |
|-----|---|-----------------|
| Yes | 1 | Ask Q4c and Q4d |
| No  | 2 | Ask Q5a         |

**QA4c.** What proportion of your total production do you export?

%

**QA4d.** Which are the main countries where you export your products?

| Country | Code |
|---------|------|
|         |      |
|         |      |
|         |      |
|         |      |
|         |      |
|         |      |

**QA5a.** Who are your target customers – men, women or children?

**QA5b.** What type of footwear do you make for (.....) target customer category?

Ask for Each category of target customers covered. (SHOW CARD "B")

| Q5a   |     |       |          |
|---|-----|-------|----------|
| Target Customers                                | Men | Women | Children |
| Code  | 1   | 2     | 3        |
| Q5b Types of Footwear                           |     |       |          |
| Outer Soles – Leather                           | 1   | 1     | 1        |
| Outer Sole - Rubber                             | 2   | 2     | 2        |
| Outer Soles – Plastic / Synthetic               | 3   | 3     | 3        |
| Upper - Leather                                 | 4   | 4     | 4        |
| Upper - Rubber                                  | 5   | 5     | 5        |
| Upper – Plastic / Synthetic                     | 6   | 6     | 6        |
| Upper – Textile                                 | 7   | 7     | 7        |
| Inner Soles                                     | 8   | 8     | 8        |
| Slippers /Slip- Ons / Flip Flop / Hawai Chappal | 9   | 9     | 9        |
| Sandles   | 10  | 10    | 10       |
| Shoes   | 11  | 11    | 11       |
| Joggers / Sports Shoes                          | 12  | 12    | 12       |
| Mens Shoes                                      | 13  | 13    | 13       |
| Ladies Shoes                                    | 14  | 14    | 14       |
| Children Shoes                                  | 15  | 15    | 15       |
| Army / Institutional Shoes                      | 16  | 16    | 16       |
| Safety Shoes                                    | 17  | 17    | 17       |
| Rubber Boots                                    | 18  | 18    | 18       |
| Leather Boots                                   | 19  | 19    | 19       |
| Others 1 (Please Specify)                       |     |       |          |
| Others 2  |     |       |          |
| Others 3  |     |       |          |



**QA6a.** A variety of footwear made of different base materials are available in the market. Please look at the card and tell us what are the various types of footwear / base material manufactured in your company (SHOW CARD “D”)  
**Ask QA6b for each of the base material mentioned in QA6a**

**QA6b.** Can you please let us know what are the different steps involved in making (-----shoes.) Name of the material (SHOW CARD “E”)  
**Ask QA6c for each of the step performed in QA6b**

**QA6c.** Please have a look at this card and let us know how each step is performed? (SHOW CARD “F”) **Record all the answers in Grid A**

## GRID A

| A6a. Base material used            | Pure Leather |             | Synthetic / artificial / patent leather |             | Textile / Fabric / Canvas |             | Rubber |             | Plastic |             | Others |             |
|------------------------------------|--------------|-------------|---|-------------|---------------------------|-------------|--------|-------------|---------|-------------|--------|-------------|
|                                    | 1            |             | 2                                       |             | 3                         |             | 4      |             | 5       |             |        |             |
| A6b/ A6c Production Process        | Steps        | Process     | Steps                                   | Process     | Steps                     | Process     | Steps  | Process     | Steps   | Process     | Steps  | Process     |
|                                    | 1            | 1 2 3 4 5 6 | 1                                       | 1 2 3 4 5 6 | 1                         | 1 2 3 4 5 6 | 1      | 1 2 3 4 5 6 | 1       | 1 2 3 4 5 6 | 1      | 1 2 3 4 5 6 |
| Designing/ Pattern Making          | 2            | 1 2 3 4 5 6 | 2                                       | 1 2 3 4 5 6 | 2                         | 1 2 3 4 5 6 | 2      | 1 2 3 4 5 6 | 2       | 1 2 3 4 5 6 | 2      | 1 2 3 4 5 6 |
| Cutting/Clicking                   | 3            | 1 2 3 4 5 6 | 3                                       | 1 2 3 4 5 6 | 3                         | 1 2 3 4 5 6 | 3      | 1 2 3 4 5 6 | 3       | 1 2 3 4 5 6 | 3      | 1 2 3 4 5 6 |
| Edging                             | 4            | 1 2 3 4 5 6 | 4                                       | 1 2 3 4 5 6 | 4                         | 1 2 3 4 5 6 | 4      | 1 2 3 4 5 6 | 4       | 1 2 3 4 5 6 | 4      | 1 2 3 4 5 6 |
| Sewing                             | 5            | 1 2 3 4 5 6 | 5                                       | 1 2 3 4 5 6 | 5                         | 1 2 3 4 5 6 | 5      | 1 2 3 4 5 6 | 5       | 1 2 3 4 5 6 | 5      | 1 2 3 4 5 6 |
| Pasting                            | 6            | 1 2 3 4 5 6 | 6                                       | 1 2 3 4 5 6 | 6                         | 1 2 3 4 5 6 | 6      | 1 2 3 4 5 6 | 6       | 1 2 3 4 5 6 | 6      | 1 2 3 4 5 6 |
| Trimming                           | 7            | 1 2 3 4 5 6 | 7                                       | 1 2 3 4 5 6 | 7                         | 1 2 3 4 5 6 | 7      | 1 2 3 4 5 6 | 7       | 1 2 3 4 5 6 | 7      | 1 2 3 4 5 6 |
| Lasting                            | 8            | 1 2 3 4 5 6 | 8                                       | 1 2 3 4 5 6 | 8                         | 1 2 3 4 5 6 | 8      | 1 2 3 4 5 6 | 8       | 1 2 3 4 5 6 | 8      | 1 2 3 4 5 6 |
| Pressing                           | 9            | 1 2 3 4 5 6 | 9                                       | 1 2 3 4 5 6 | 9                         | 1 2 3 4 5 6 | 9      | 1 2 3 4 5 6 | 9       | 1 2 3 4 5 6 | 9      | 1 2 3 4 5 6 |
| Molding                            | 10           | 1 2 3 4 5 6 | 10                                      | 1 2 3 4 5 6 | 10                        | 1 2 3 4 5 6 | 10     | 1 2 3 4 5 6 | 10      | 1 2 3 4 5 6 | 10     | 1 2 3 4 5 6 |
| Adding Embellishments/ Accessories | 11           | 1 2 3 4 5 6 | 11                                      | 1 2 3 4 5 6 | 11                        | 1 2 3 4 5 6 | 11     | 1 2 3 4 5 6 | 11      | 1 2 3 4 5 6 | 11     | 1 2 3 4 5 6 |
| Embroidery                         | 12           | 1 2 3 4 5 6 | 12                                      | 1 2 3 4 5 6 | 12                        | 1 2 3 4 5 6 | 12     | 1 2 3 4 5 6 | 12      | 1 2 3 4 5 6 | 12     | 1 2 3 4 5 6 |
| Buffing                            | 13           | 1 2 3 4 5 6 | 13                                      | 1 2 3 4 5 6 | 13                        | 1 2 3 4 5 6 | 13     | 1 2 3 4 5 6 | 13      | 1 2 3 4 5 6 | 13     | 1 2 3 4 5 6 |
| Polishing                          | 14           | 1 2 3 4 5 6 | 14                                      | 1 2 3 4 5 6 | 14                        | 1 2 3 4 5 6 | 14     | 1 2 3 4 5 6 | 14      | 1 2 3 4 5 6 | 14     | 1 2 3 4 5 6 |
| Labeling                           | 15           | 1 2 3 4 5 6 | 15                                      | 1 2 3 4 5 6 | 15                        | 1 2 3 4 5 6 | 15     | 1 2 3 4 5 6 | 15      | 1 2 3 4 5 6 | 15     | 1 2 3 4 5 6 |
| Packing                            |              |             |   |             |                           |             |        |             |         |             |        |             |
| Others.....(Please Specify)        |              |             |   |             |                           |             |        |             |         |             |        |             |

## FOOTWEAR SURVEY QUESTIONNAIRE

**QA7.** What are the various sub departments in your company? (SHOW CARD “G”)

| Department                               | Code | Department                  | Code |
|--|------|-----------------------------|------|
| Design/ Pattern Making                   | 1    | Others.....(Please Specify) |      |
| Clicking/ Cutting                        | 2    |                             |      |
| Closing/ Sewing/ Stitching/ Upper Making | 3    |                             |      |
| Bottom/ Sole Making                      | 4    |                             |      |
| Assembly                                 | 5    |                             |      |
| Finishing                                | 6    |                             |      |
| Packing                                  | 7    |                             |      |

**QA8.** How many employees do you currently have in your organization? (SHOW CARD “H”)

| Organization Size | Number of Employees | Code | Ask section |
|-------------------|---------------------|------|-------------|
| Micro Scale       | Less than 10        | 1    | B           |
| Small Scale       | 11-30               | 2    | Ask section |
| Medium Scale      | 31-99               | 3    | C           |
| Large Scale       | 100 and above       | 4    |             |

Actual Number:

## SECTION B

## WORK FORCE CHARACTERISTICS

## Section B- Work Force Characteristics (Less Than 10 Employees)

You said that there are \_\_\_\_\_ (number of employees) in your company. Starting from the person working at the most senior position please let us know Ask QB1 to QB13 ( *Similarly ask for all employees from most senior position/level to the most junior position/level* )

**QB1.** What is his/ her designation in the company? (SHOW CARD “I”)

**QB2.** What is his/her current education /qualification level? (SHOW CARD “JA”)

**QB3.** Has he /she acquired any certification/diploma to perform the job or do they hold any other Diploma/Certificates? (SHOW CARD “JB”)

**QB4.** How many years has he/she been with the company? (Write actual number of years and months and record in four digits)(yr/mm)

**QB5.** What is his/her current employment status? ( SHOW CARD “K”)

**QB6.** In what age group does he/she fall? (SHOW CARD “L”)

**QB7.** What is the gender of the employee?

**QB8.** What role /job/ task does he/she perform?

**QB9.** On a scale of 1 to 5, (where 5 = excellent, 4=good, 3=average, 2=poor and 1=very poor) how would you rate him/her on the tasks he/she performed when he/she joined your company? (SHOW CARD “N”)

**QB10.** Have you provided him/her any type of training to perform the job? (If yes =1 in QB10 then ask B11)

**QB11.** On a scale of 1 to 5, (where 5 = excellent, 4=good, 3=average, 2, bad and 1=very poor) how would you rate him/her on the tasks he/she performs now? (SHOW CARD “N”)

**QB12.** What type of training was provided to them to perform the job?

**QB13.** What would you do/suggest to improve his/her skills to perform his/her current job more efficiently?

**Record all the answers in Grid B**



**GRID B**

| QB1                            | QB2& QB3   | QB4                    | QB5  | QB6   | QB7            |
|--------------------------------|--|------------------------|--|---|----------------|
| Designation<br>(SHOW CARD "I") | Qualification (SHOW CARD "JA")   | Years with the company | Employment status<br>(SHOW CARD "K")           | Age<br>(SHOW CARD "L")  | Gender         |
|                                | Education Level/<br>Certification  |                        |  |   |                |
|                                | Masters Program -MA<br>Bachelors Program - BA - BA(Hons)<br>Advanced Diploma (2-3 years program)<br>Diploma – 2 years<br>Diploma – 1 year<br>Certificates 12-6 months<br>Certificates 6-3 months<br>Certificates 3-1 months<br>Certificates Less than one month<br>Workshops<br>Online Programs / Distant Learning Programs<br>Others .....<br>(Please Specify ) | Y                      | Permanent = 1<br>Contract = 2<br>Part Time = 3 | <15 years = 1<br>15-20 years = 2<br>21-30 years = 3<br>31-40 years = 4<br>41-50 years = 5<br>51-60 years = 6<br>>60 years = 7 | M = 1<br>F = 2 |
| 1                              | Code   |                        |  |   |                |
| 2                              |  |                        |  |   |                |
| 3                              |  |                        |  |   |                |
| 4                              |  |                        |  |   |                |
| 5                              |  |                        |  |   |                |
| 6                              |  |                        |  |   |                |

| QB1                            | QB2& QB3   | QB4                    | QB5  | QB6   | QB7            |
|--------------------------------|--|------------------------|--|---|----------------|
| Designation<br>(SHOW CARD "I") | Qualification (SHOW CARD "JA")   | Years with the company | Employment status<br>(SHOW CARD "K")           | Age<br>(SHOW CARD "L")  | Gender         |
|                                | Education Level/<br>Certification  |                        |  |   |                |
|                                | Masters Program -MA<br>Bachelors Program - BA - BA(Hons)<br>Advanced Diploma (2-3 years program)<br>Diploma – 2 years<br>Diploma – 1 year<br>Certificates 12-6 months<br>Certificates 6-3 months<br>Certificates 3-1 months<br>Certificates Less than one month<br>Workshops<br>Online Programs / Distant Learning Programs<br>Others .....<br>(Please Specify ) | Y                      | Permanent = 1<br>Contract = 2<br>Part Time = 3 | <15 years = 1<br>15-20 years = 2<br>21-30 years = 3<br>31-40 years = 4<br>41-50 years = 5<br>51-60 years = 6<br>>60 years = 7 | M = 1<br>F = 2 |
| 7                              | Code   |                        |  |   |                |
| 8                              |  |                        |  |   |                |
| 9                              |  |                        |  |   |                |
| 10                             |  |                        |  |   |                |

|    | QB8                    | QB9                                    | QB10                    | QB11                                | QB12                 | QB13                                   |
|----|------------------------|--|-------------------------|-------------------------------------|----------------------|--|
|    | Role / Tasks Performed | Skills Level When Hired (SHOWCARD "N") | OJT Provided Yes=1 No=2 | Current Skills Level (SHOWCARD "N") | Type of OJT Provided | Suggestions to Improve the Skill Level |
| 1  |                        |  |                         |                                     |                      |  |
| 2  |                        |  |                         |                                     |                      |  |
| 3  |                        |  |                         |                                     |                      |  |
| 4  |                        |  |                         |                                     |                      |  |
| 5  |                        |  |                         |                                     |                      |  |
| 6  |                        |  |                         |                                     |                      |  |
| 7  |                        |  |                         |                                     |                      |  |
| 8  |                        |  |                         |                                     |                      |  |
| 9  |                        |  |                         |                                     |                      |  |
| 10 |                        |  |                         |                                     |                      |  |

**B14.** Do you provide off-the job trainings to your employees

|     |   |                 |
|-----|---|-----------------|
| Yes | 1 | Go To Section D |
| No  | 2 | Go To Section E |

### SECTION C

#### Section C- Work Force Characteristics (More than 10 Employees)

**QC1.** How many employees do you currently have in your organization? (Please write actual number in the box)

|  |  |  |  |  |
|--|--|--|--|--|
|  |  |  |  |  |
|--|--|--|--|--|

**QC2.** Thinking about the age of the employees can you please let us know how many employees in your organization fall under each Age Group mentioned on the card (**SHOW CARD "L"**). Read age groups from the card and record in column **QC2** against each age group.

*For the number of the employees under each age group mentioned in QC2 please ask QC3*

**QC3.** How many are male employees and How many are female employees?

| QC2                |      |       | QC3  |        |
|--------------------|------|-------|------|--------|
| Age Group          | Code | Total | Male | Female |
| Less than 15 years | 1    |       |      |        |
| 16-20 years        | 2    |       |      |        |
| 21-30 years        | 3    |       |      |        |
| 31-40 years        | 4    |       |      |        |
| 31-50 years        | 5    |       |      |        |
| 51-60 years        | 6    |       |      |        |
| >60 years          | 7    |       |      |        |

**QC4.** Thinking about the number of years the employees have been with your company can you please let us know how many employees in your organization fall under each group of years with the company mentioned on the card (**SHOW CARD "M"**). Read

| QC4                    |      |       |
|------------------------|------|-------|
| Years with the company | Code | Total |
| Less than one year     | 1    |       |
| 1-2 years              | 2    |       |
| 2-4 years              | 3    |       |
| 5-10 years             | 4    |       |
| 11-15 years            | 5    |       |
| 16-20 years            | 6    |       |
| More than 20 years     | 7    |       |

**QC5.** Thinking about the employment status can you please let us know how many employees in your organization fall under group mentioned on the card (**SHOW CARD "K"**). Read

| QC5                                    |      |       |
|--|------|-------|
| Employment Status                      | Code | Total |
| Permanent                              | 1    |       |
| Contractual                            | 2    |       |
| Daily Wagers working on hourly rate    | 3    |       |
| Daily Wagers working on per piece rate | 4    |       |



FOOTWEAR SURVEY QUESTIONNAIRE

- QC6.** Thinking about the designation of the employees can you please let me know how many employees in your organization fall under each group mentioned on the card (**SHOW CARD “I”**)
- QC7a.** For the number of employees under each designation mentioned please ask the \_\_\_\_\_ (number) who are working as (role/designation) can you please let me know how many employees are (.....) qualification? (**SHOW CARD “JA”**). Read
- QC7b.** For the number of employees under each designation mentioned please ask the \_\_\_\_\_ (number) Who are working as (role/designation ) and with (.....) qualification can you please let me know how many employees have acquired certification/ diploma to perform the job or do they hold any other Diploma/Certificates?  
Ask for the each employee holding Diploma/ Certificate, what Diploma/ Certificate do they hold? (**SHOW CARD “JB”**). Read

| QC6                               |      |     | QC7                  |           |                     |              |        |        |         |                   |                                     |            |        |
|-----------------------------------|------|-----|----------------------|-----------|---------------------|--------------|--------|--------|---------|-------------------|-------------------------------------|------------|--------|
| DESIGNATION                       | Code | No. | Professional         |           |                     |              |        |        |         |                   |                                     |            |        |
|                                   |      |     | MBA / Post Graduates | Graduates | Diploma Holder /DAE | Intermediate | Matric | Middle | Primary | Less than Primary | Some Education/ Religious Education | Illiterate | Others |
| Pattern makers / Design Engineers | 1    |     |                      |           |                     |              |        |        |         |                   |                                     |            |        |
| Production Manager                | 2    |     |                      |           |                     |              |        |        |         |                   |                                     |            |        |
| Quality Assurance Manager         | 3    |     |                      |           |                     |              |        |        |         |                   |                                     |            |        |
| Procurement Manager               | 4    |     |                      |           |                     |              |        |        |         |                   |                                     |            |        |
| Line In-charge / Line Manager     | 5    |     |                      |           |                     |              |        |        |         |                   |                                     |            |        |

|                                |    | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |  |
|--------------------------------|----|---|---|---|---|---|---|---|---|---|----|----|--|
| Supervisors                    | 6  |   |   |   |   |   |   |   |   |   |    |    |  |
| Machine Operator / Technicians | 7  |   |   |   |   |   |   |   |   |   |    |    |  |
| Other Skilled                  | 8  |   |   |   |   |   |   |   |   |   |    |    |  |
| Un Skilled                     | 10 |   |   |   |   |   |   |   |   |   |    |    |  |
| Others                         |    |   |   |   |   |   |   |   |   |   |    |    |  |

**QC8.** What roles /jobs/ task does he/she perform?

**QC9.** On a scale of 1 to 5, (where 5 = excellent, 4=good, 3=average, 2, poor and 1=very poor) how would you rate him/her on the tasks he/she performed when he/she joined your company? (**SHOW CARD "N"**)

**QC10.** On a scale of 1 to 5, (where 5 = excellent, 4=good, 3=average, 2, poor and 1=very poor) how would you rate him/her on the tasks he/she performs now? (**SHOW CARD "N"**)

**QC11.** Have you provided any type of on- the-job training to perform the job?  
(if yes =1 in QC11 then ask QC12 and Q13)

**QC12.** What type of skill related training/ on –the-job training do you provide them?

**QC13.**What measures are you taking to improve his/her skills to perform his/her current job more efficiently?



| QC8  | QC9   | QC10   | QC11                              | QC12  | QC13   |
|--|---|--|-----------------------------------|---|--|
| Role /Job/<br>Tasks performed                              | Skills Level<br>When Hired<br>(SHOWCARD<br>"N") | Current Skills<br>Level<br>(SHOWCARD<br>"N") | OJT<br>Provided<br>Yes =1<br>No=2 | Type of Skill<br>Related<br>Trainings<br>Provided | Measures<br>Taken to<br>Improve the<br>Skill Level |
| Pattern Makers /<br>Design Engineers<br>Production Manager |   |  |                                   |   |  |
| Quality Assurance<br>Manager<br>Procurement Manager        |   |  |                                   |   |  |
| Line In-charge /<br>Line Manager<br>Supervisors            |   |  |                                   |   |  |
| Machine Operator /<br>Technicians<br>Skilled               |   |  |                                   |   |  |
| Other-Skilled  |   |  |                                   |   |  |
| Un Skilled   |   |  |                                   |   |  |
| Others...(Please Specify)                                  |   |  |                                   |   |  |

## SECTION D

## Off Job Trainings

**QD1.** Do you provide off-the job trainings to your employees?

|     |   |                 |
|-----|---|-----------------|
| Yes | 1 | Continue        |
| No  | 2 | Go To Section F |

**QD2.** Which are the specific job roles for which you provide off the job trainings to your employees ? (Record all job roles for which off- the- job -trainings are provided in column QD2)

**Ask QD3 to QD5 for each job role mentioned in QD2 for which Off-Job- Training is provided**

**QD3.** Can you please give us the details of the Training Courses/Name for ..... (Job Role mentioned in QD3)? (SHOW CARD "T")

**QD4.** What is the normal duration of the Training Course ..... (Training course mentioned in QD4)? (SHOW CARD "R")

**QD5.** Where/which institute do you send the employees for..... (Training course mentioned in QD5)?

| Job Role 1<br>QD2 | Training Course<br>QD3 | Duration<br>QD4 | Training Providers<br>QD5 |
|-------------------|------------------------|-----------------|---------------------------|
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
| Job Role 2        | Training Course        | Duration        | Training Providers        |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
| Job Role 3        | Training Course        | Duration        | Training Providers        |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
| Job Role 4        | Training Course        | Duration        | Training Providers        |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
| Job Role 5        | Training Course        | Duration        | Training Providers        |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |
|                   |                        |                 |                           |

**SECTION F****Use of Machines**

**QF1.** Please provide a list of machines used in the shoe making process in your factory and the key jobs performed on them? Please let us know the skills required to operate the machine.

| Machines | Jobs Performed | Skills required to operate the machine |
|----------|----------------|--|
|          |                |  |
|          |                |  |
|          |                |  |
|          |                |  |
|          |                |  |
|          |                |  |

**SECTION G****Skill Assessment**

**QG1a.** In your opinion what are the skills required in the footwear sector? Record all the answers under column QG1a (Unprompted)

The industry experts and TSPs have identified a number of skills required in the footwear sector on the manufacturing side. The skills are listed on the card (**SHOW CARD “O”**) Please have a look at this card to answer our next few questions.

**QG1b.** In your opinion what are the skills required in the footwear sector? Record all the answers under column QG1b.

*For each of the skills mentioned in QG1 Ask QG2 and QG3*

**QG2.** You have mentioned that \_\_\_\_\_ (skill) is required in the footwear sector, let me know if it is easy to find, hard to find or neither easy nor difficult to find (**SHOW CARD “P”**)?

**QG3.** In your opinion what would be the future need for \_\_\_\_\_ skills, will it increase, decrease or remain the same (**SHOW CARD “Q”**)?

**QG4** In your opinion which are the skills that are available in the market but does match the required level/ standard (hard to fill skill) ? (Record your answer in **QG4**)

*For each of the skills mentioned in QG4 ask QG5 – QG8*

**QG5.** How many.....(skills that are available in the market but does not match the required level/ hard to fill skill) do you need in the next five years? (Record your answer in **QG5**)

**QG6** What are the skills from the list you identified in **QG1** and **QG4**, for which you feel Technical and Vocational Training is required (Record your answer in **QG6**)

**QG7** What are the skills for which you think on-the-job training is best suited (Record your answer in **QG7**)

**QG8.** What are the skills for which you think off-the-job training is best suited (Record in **QG8**)

**GRID C**

|  | List of possible skills   | Skills Required |                          | Skill Availability (SHOW CARD “P”) | Future Skill Needs (SHOW CARD “Q”) | Hard to fill skills | Number required in next 5 years | Skills where TVE is required | OJT required | Off-the-Job trainings required |
|--|---|-----------------|--------------------------|------------------------------------|------------------------------------|---------------------|---------------------------------|------------------------------|--------------|--------------------------------|
|  |   | Unprompted      | Prompted (SHOW CARD “O”) |                                    |                                    |                     |                                 |                              |              |                                |
|  |   | QG1a            | QG1b                     |                                    |                                    |                     |                                 |                              |              |                                |
|  |   | 1               | 1                        | QG2                                | QG3                                | QG4                 | QG5                             | QG6                          | QG7          | QG8                            |
| Designing Skills                         | 1. Footwear Designing Skills                                      | 2               | 2                        |                                    |                                    | 1                   |                                 | 1                            | 1            | 1                              |
|  | 2. Pattern Making Skills  | 3               | 3                        |                                    |                                    | 2                   |                                 | 2                            | 2            | 2                              |
|  | 3. Advanced IT / Software CAD/CAM                                 | 4               | 4                        |                                    |                                    | 3                   |                                 | 3                            | 3            | 3                              |
| Hand Craft Skills                        | 4. Use of Basic Hand Tools  | 5               | 5                        |                                    |                                    | 4                   |                                 | 4                            | 4            | 4                              |
|  | 5. Hand Sewing  | 6               | 6                        |                                    |                                    | 5                   |                                 | 5                            | 5            | 5                              |
|  | 6. Hand Embroidery  | 7               | 7                        |                                    |                                    | 6                   |                                 | 6                            | 6            | 6                              |
| Simple Machine Operating Skills          | 7. Cutting / Pasting / Lasting / Trimming / Polishing / Finishing | 8               | 8                        |                                    |                                    | 7                   |                                 | 7                            | 7            | 7                              |
|  | 8. Accessorizing / Labeling                                       | 9               | 9                        |                                    |                                    | 8                   |                                 | 8                            | 8            | 8                              |
|  | 9. Sewing Machine Skills  | 10              | 10                       |                                    |                                    | 9                   |                                 | 9                            | 9            | 9                              |
| Plant / Complex Machine Operating Skills | 10. Material Handling skills                                      | 11              | 11                       |                                    |                                    | 10                  |                                 | 10                           | 10           | 10                             |
|  | 11. Labeling Machine / Embossing Machine / Cutting Machine        | 12              | 12                       |                                    |                                    | 11                  |                                 | 11                           | 11           | 11                             |
|  | 12. Air Blowing Machine Operating Skills                          | 13              | 13                       |                                    |                                    | 12                  |                                 | 12                           | 12           | 12                             |
| Technical /                              | 13. Plastic / Rubber Molding Machine                              | 14              | 14                       |                                    |                                    | 13                  |                                 | 13                           | 13           | 13                             |
|  | 14. Leather Footwear Processing Machines                          | 15              | 15                       |                                    |                                    | 14                  |                                 | 14                           | 14           | 14                             |
|  | 15. Lab Inspection and Testing                                    | 16              | 16                       |                                    |                                    | 15                  |                                 | 15                           | 15           | 15                             |
|  | 16. Cutting/Stitching Machines Operations                         | 17              | 17                       |                                    |                                    | 16                  |                                 | 16                           | 16           | 16                             |
|  | 17. Leather Related Skills  |                 |                          |                                    |                                    | 17                  |                                 | 17                           | 17           | 17                             |



| FOOTWEAR SURVEY QUESTIONNAIRE |   |                 |                          |                                    |                                    |                     |                                 |                              |              |                                |
|-------------------------------|---|-----------------|--------------------------|------------------------------------|------------------------------------|---------------------|---------------------------------|------------------------------|--------------|--------------------------------|
|                               | List of possible skills   | Skills Required |                          | Skill Availability (SHOW CARD "P") | Future Skill Needs (SHOW CARD "Q") | Hard to fill skills | Number required in next 5 years | Skills where TVE is required | OJT required | Off-the-Job trainings required |
|                               |   | Un prompted     | Prompted (SHOW CARD "Q") |                                    |                                    |                     |                                 |                              |              |                                |
|                               |   |                 |                          |                                    |                                    |                     |                                 |                              |              |                                |
| practical Skills              | 18. Color Matching and Quality Control During Continuous Production | 18              | 18                       |                                    |                                    | 18                  |                                 | 18                           | 18           | 18                             |
|                               | 19. Product Evaluation Skills                                       | 19              | 19                       |                                    |                                    | 19                  |                                 | 19                           | 19           | 19                             |
|                               | 20. Communication   | 20              | 20                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 21. Team Building   | 21              | 21                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
| Soft Skills                   | 22. Training  | 22              | 22                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 23. Problem Solving   | 23              | 23                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 24. Customer Handling   | 24              | 24                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 25. Time Management   | 25              | 25                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 26. Adaptability/Flexibility  | 26              | 26                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 27. English Language  | 27              | 27                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 28. Other Language (Urdu, Punjabi.etc.)                             | 28              | 28                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 29. Literacy  | 29              | 29                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
| Basic Skills                  | 30. Numeracy  | 30              | 30                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 31. Work Ethics   | 31              | 31                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 32. Health and Safety   | 32              | 32                       |                                    |                                    | XX                  | XX                              | XX                           | XX           | XX                             |
|                               | 33. Others:   |                 |                          |                                    |                                    |                     |                                 |                              |              |                                |
|                               | 34. Others:   |                 |                          |                                    |                                    |                     |                                 |                              |              |                                |
|                               | 35. Others:   |                 |                          |                                    |                                    |                     |                                 |                              |              |                                |
|                               | 36. Others:   |                 |                          |                                    |                                    |                     |                                 |                              |              |                                |

| FOOTWEAR SURVEY QUESTIONNAIRE  |               |      |                       |      |
|--|---------------|------|-----------------------|------|
| <i>For Each of the hard to find skill mentioned in QG4 ask QG9 and QG10</i>                        |               |      |                       |      |
| <b>QG9.</b> What are the main causes of having hard - to- find skills?                             |               |      |                       |      |
| <b>QG10.</b> What is your organization doing to overcome the difficulties in finding these skills? |               |      |                       |      |
| Skill Code   | Reasons (QG9) | Code | Measures Taken (QG10) | Code |
|  |               |      |                       |      |
|  |               |      |                       |      |
|  |               |      |                       |      |
|  |               |      |                       |      |

**SECTION H****Training Service Providers**

**QH1.** There are a number of training providers involved in technical and vocational footwear trainings. Are you aware of the various Technical and Vocational Footwear Education Centers in Punjab?

|     |   |                                   |
|-----|---|-----------------------------------|
| Yes | 1 | Record their names in Column "H1" |
| No  | 2 | Skip Section H                    |

**QH2.** Do you receive regular information about the footwear training courses from any of these institutions? (Record in Column "H2")

**QH3.** Have you in the last 5 years hired employees holding certification/diploma from any of these institutions? (Record in Column "H3")

**QH4.** Do you intend to hire employees holding certification/diploma from any of these institutions? (Record in Column "H4")

**QH5.** Do you think they provide trainings in footwear trades/technology in which your esteemed company is involved? (Record in Column "H5")

**QH6.** Rank the institutions that you are aware of in terms of quality of Training? (Record in Column "H6")

| H1   |      | H2                                      |   | H3              |   | H4                |   | H5                                     |   | H6      |
|------|------|---|---|-----------------|---|-------------------|---|--|---|---------|
| TSPs |      | Receive Information on Training Courses |   | Employees Hired |   | Intention to Hire |   | Training in Relevant Trades/Technology |   | Ranking |
|      | Code | Y                                       | N | Y               | N | Y                 | N | Y                                      | N |         |
| A1.  |      | 1                                       | 2 | 1               | 2 | 1                 | 2 | 1                                      | 2 |         |
| A2.  |      | 1                                       | 2 | 1               | 2 | 1                 | 2 | 1                                      | 2 |         |
| A3.  |      | 1                                       | 2 | 1               | 2 | 1                 | 2 | 1                                      | 2 |         |
| A4.  |      | 1                                       | 2 | 1               | 2 | 1                 | 2 | 1                                      | 2 |         |
| A5.  |      | 1                                       | 2 | 1               | 2 | 1                 | 2 | 1                                      | 2 |         |

**QH7.** Will your company be willing to provide practical/ theoretical/ on-the-job training to students of footwear institutes attending trainings in relation to footwear during their course of study?

|     |     |      |
|-----|-----|------|
| Yes | Ask | QH8  |
| No  | Ask | QH10 |

**QH8.** What are the various skills for which your company will be willing to provide practical/ theoretical/ on-the-job training to students of footwear institutes attending trainings in relation to footwear during their course of study? (Please list down in Column H8) *For each skill mentioned ask*

**QH9.** How many trainees will your company be able to accommodate each year?

| QH8    |  |  | QH9        |                        |
|--------|--|--|------------|------------------------|
| Skills |  |  | Skill Code | No. of Trainees / year |
|        |  |  |            |                        |
|        |  |  |            |                        |
|        |  |  |            |                        |
|        |  |  |            |                        |
|        |  |  |            |                        |
|        |  |  |            |                        |

**QH10.** Can you please let me know the reasons you think you will not be able to provide practical/ theoretical/ on-the-job training to students of footwear institutes attending trainings in relation to footwear during their course of study?

(Show Card –Code List QH10) Record All The Answers/Codes in the Below Column for Codes.

If there are any other answers not mentioned in the code list, please write in detail in the space for "OTHERS".

| QH10  |  |  |  |  |  |  |  |        |      |
|---|--|--|--|--|--|--|--|--------|------|
| Reasons for Not Providing Practical/Theoretical/ On - the - job Training to Students of Footwear Institute Attending Trainings in Relation to Footwear During Their Course of Study |  |  |  |  |  |  |  | Others | Code |
| CODES   |  |  |  |  |  |  |  |        |      |
|   |  |  |  |  |  |  |  |        |      |
|   |  |  |  |  |  |  |  |        |      |
|   |  |  |  |  |  |  |  |        |      |
|   |  |  |  |  |  |  |  |        |      |
|   |  |  |  |  |  |  |  |        |      |
|   |  |  |  |  |  |  |  |        |      |

**QH11.** Will you be willing to or you normally relieve your workers (for a certain period) for training outside your factory?

|     |   |                  |
|-----|---|------------------|
| Yes | 1 | Ask QH12 to QH14 |
| No  | 2 | Ask QH15         |



## SECTION I

## Recruitment

**Q11. What methods do you apply for hiring workers? (SHOW CARD "S")**

**Q12a.** What are the key selection and recruitment criteria in your organization for Middle Management Level?

**Q12b.** What are the key selection and recruitment criteria in your organization for Workers Level?

[illegible]

| No | 1 | Yes | 2 | % |
|----|---|-----|---|---|
|----|---|-----|---|---|

Show Card –Code List QH15) Record all the Answers/Codes in the below Column for Codes.

[illegible]

**Q13.** In future would you prefer to hire workers who hold Diploma/Certification from known TSPs in footwear related trades/technologies? If “Yes” record the trades (**SHOW CARD “T”**). If “No” Please give the reasons.

| Q13 |   | Trades             |      |                                |      |
|-----|---|--------------------|------|--------------------------------|------|
|     |   |                    | Code |                                | Code |
| Yes | 1 | Basic Shoe Making  | 1    | Closing                        | 13   |
|     |   | Feet Anatomy       | 2    | Finishing                      | 14   |
|     |   | Footwear Designing | 3    | Basic Hand Tools               | 15   |
|     |   | Pattern Making     | 4    | Basic Machine                  | 16   |
|     |   | Leather Technology | 5    | Material Handling              | 17   |
|     |   | Shoe Lasting       | 6    | Perform Table Based Operations | 18   |
|     |   | Shoe Assembling    | 7    | Molding                        | 19   |
|     |   | Cutting/Clicking   | 8    | Shoe Repairing                 | 20   |
|     |   | Hand Stitching     | 9    | Machine repair/Maintenance     | 21   |
|     |   | Machine Stitching  | 10   | CAD/CAM                        | 22   |
|     |   | Upper Making       | 11   | Quality Control                | 23   |
|     |   | Bottom Making      | 12   | Others                         |      |
|     |   | Reasons            |      |                                |      |
| No  | 2 |                    |      |                                |      |

**Q14.** Which types of workers were hired during the last 2 years? (List down in table below)

*For each type of workers hired ask*

**Q15.** How many workers were hired?

**Q16.** Of these how many were hired at new jobs (Q16A) and how many were hired as replacement (Q6B)?

**Q17.** Of those who were hired during the last 2 years, how many are still working with you?

| Q14                   | Q15                           | Q16A              | Q16B                 | Q17           |
|-----------------------|-------------------------------|-------------------|----------------------|---------------|
| Type of Workers Hired | Total Number of Workers Hired | Hired on New Jobs | Hired as Replacement | Still Working |
| 1.                    |                               |                   |                      |               |
| 2.                    |                               |                   |                      |               |
| 3.                    |                               |                   |                      |               |

|    |  |  |  |  |
|----|--|--|--|--|
| 4. |  |  |  |  |
| 5. |  |  |  |  |
| 6. |  |  |  |  |
| 7. |  |  |  |  |

**Q18.** How many current vacancies for workers and middle management do you have in your company at this moment?

| Code | Worker Level (Job Titles) | Number | Code | Middle Management Level (Job Titles) | Number |
|------|---------------------------|--------|------|--------------------------------------|--------|
|      |                           |        |      |                                      |        |
|      |                           |        |      |                                      |        |
|      |                           |        |      |                                      |        |
|      |                           |        |      |                                      |        |
|      |                           |        |      |                                      |        |

**Q19.** At which level would you hire females?

|                         |   |
|-------------------------|---|
| Worker Level            | 1 |
| Middle Management Level | 2 |

Any specific job titles that you seek to employ women against:

| Worker Level (Job Titles) | Code | Middle Management Level (Job Titles) | Code |
|---------------------------|------|--------------------------------------|------|
|                           |      |                                      |      |
|                           |      |                                      |      |
|                           |      |                                      |      |
|                           |      |                                      |      |

**Q110.** What are the hard-to-fill vacancies/jobs in your company and how many (even if these are currently filled)?

| Code | Worker / Operator Level (Job title) | Number | Code | Middle Management Level (Job title) | Number |
|------|-------------------------------------|--------|------|-------------------------------------|--------|
|      |                                     |        |      |                                     |        |
|      |                                     |        |      |                                     |        |
|      |                                     |        |      |                                     |        |
|      |                                     |        |      |                                     |        |
|      |                                     |        |      |                                     |        |
|      |                                     |        |      |                                     |        |
|      |                                     |        |      |                                     |        |
|      |                                     |        |      |                                     |        |



**QI11A.** What are the main causes of having hard to fill vacancies for worker level?

(Show Card –Code List QI11a &QI11b) Record all the Answers/Codes in the Below Column for Codes.

If there are any other answers not mentioned in the code list, please write the details in the space for “OTHERS”.

| QI11A                 |  |  |  |  |  |  |  |        |      |
|-----------------------|--|--|--|--|--|--|--|--------|------|
| Causes-Worker’s Level |  |  |  |  |  |  |  | Others | Code |
| CODES                 |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |
|                       |  |  |  |  |  |  |  |        |      |

**QI11B.** What are the main causes of having hard to fill vacancies for middle management level?

(Show Card –Code List QI11a & QI11b) Record All The Answers/Codes in the Below Column for Codes.

If there are any other answers not mentioned in the code list, please write the details in the space for “OTHERS”.

| QI11B                           |  |  |  |  |  |  |  |        |      |
|---------------------------------|--|--|--|--|--|--|--|--------|------|
| Causes –Middle Management Level |  |  |  |  |  |  |  | Others | Code |
| CODES                           |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |
|                                 |  |  |  |  |  |  |  |        |      |

**QI12A.** What measures are being taken by your organization to overcome the difficulties regarding hard to fill vacancies for workers level?

(Show Card –Code List QI12a and QI12B) Record all the Answers/Codes in the Below Column for Codes.

If there are any other answers not mentioned in the code list, please write the details in the space for “OTHERS”.

| QI12A          |  |  |  |  |  |  |  |        |      |
|----------------|--|--|--|--|--|--|--|--------|------|
| Measures Taken |  |  |  |  |  |  |  | Others | Code |
| CODES          |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |

**QI12B.** What measures are being taken by your organization to overcome the difficulties regarding hard to fill vacancies for middle management level?

(Show Card –Code List Q12B) Record all the Answers/Codes in the Below Column for Codes.

If there are any other answers not mentioned in the code list, please write the details in the space for “OTHERS”.

| QI12B          |  |  |  |  |  |  |  |        |      |
|----------------|--|--|--|--|--|--|--|--------|------|
| Measures Taken |  |  |  |  |  |  |  | Others | Code |
| CODES          |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |
|                |  |  |  |  |  |  |  |        |      |

**SECTION J****QJ1.** Have you heard of PSDF?

|     |   |                  |
|-----|---|------------------|
| Yes | 1 | Continue         |
| No  | 2 | Skip Section 'J' |

**QJ2.** What do you know about PSDF, its role, vision, mission and responsibilities in Punjab?

| Relevant Points | Code |
|-----------------|------|
|                 |      |
|                 |      |
|                 |      |
|                 |      |
|                 |      |

**QJ3.** How can PSDF help the industry and especially those who are willing to develop their career effectively in footwear industry?

| Relevant Points | Code |
|-----------------|------|
|                 |      |
|                 |      |
|                 |      |
|                 |      |

**QJ4.** What are your suggestions/ recommendations for PSDF?

| Suggestions/Recommendations | Code |
|-----------------------------|------|
|                             |      |
|                             |      |
|                             |      |
|                             |      |
|                             |      |

**SECTION K****QK1.** In future do you intend to setup footwear training centre within your facility? (Yes/ No)

|     | If "Yes" then you intend do to it through:                              | Code |
|-----|---|------|
| Yes | Self -Financing   | 1    |
|     | PSDF Supporting Program   | 2    |
|     | Any other organization/ institute willing to support/ finance the setup | 3    |
|     | Others .....(Please Specify)  |      |
| No  | Go to Section "L"   | 4    |

**SECTION L****QL1.** How many retail outlets are being managed by your organization?

|  |  |  |  |
|--|--|--|--|
|  |  |  |  |
|--|--|--|--|

**QL2.** What are the designations/roles of the employees working at the retail outlets that are being managed by your organization? (**SHOW CARD "U"**)

| Retail Designation/Role     | Code |
|-----------------------------|------|
| Store Manager               | 1    |
| Senior Sales Staff          | 2    |
| Junior Sales Staff          | 3    |
| Stock Keeper/ Handler       | 4    |
| Others.....(Please Specify) |      |

**QL3.** Generally what is the employment status of the employees working as ..... (designation/role) at the retail outlets that are being managed by your organization (**SHOW CARD "K"**).

| QL3               |               |                    |                    |                       |        |
|-------------------|---------------|--------------------|--------------------|-----------------------|--------|
| Employment Status | Store Manager | Senior Sales Staff | Junior Sales Staff | Stock Keeper/ Handler | Others |
| Permanent         | 1             | 1                  | 1                  | 1                     | 1      |
| Contractual       | 2             | 2                  | 2                  | 2                     | 2      |



|   |   |   |   |   |   |
|---|---|---|---|---|---|
| Contractual working on commission base  | 5 | 5 | 5 | 5 | 5 |
| Daily Wagers working on commission base | 6 | 6 | 6 | 6 | 6 |
| Others .....(Please specify)            |   |   |   |   |   |

**QL4.** Generally what is the qualification of the employees working as ..... (designation/role) at the retail outlets that are being managed by your organization (**SHOW CARD "JA"**).

| QL4                                 |               |                    |                    |                      |        |
|-------------------------------------|---------------|--------------------|--------------------|----------------------|--------|
| Qualification                       | Store Manager | Senior Sales Staff | Junior Sales Staff | Stock Keeper/Handler | Others |
| Professional                        | 1             | 1                  | 1                  | 1                    | 1      |
| MBA / Post Graduates                | 2             | 2                  | 2                  | 2                    | 2      |
| Graduates                           | 3             | 3                  | 3                  | 3                    | 3      |
| Diploma holder /DAE                 | 4             | 4                  | 4                  | 4                    | 4      |
| Intermediate                        | 5             | 5                  | 5                  | 5                    | 5      |
| Matric                              | 6             | 6                  | 6                  | 6                    | 6      |
| Middle                              | 7             | 7                  | 7                  | 7                    | 7      |
| Primary                             | 8             | 8                  | 8                  | 8                    | 8      |
| Less than Primary                   | 9             | 9                  | 9                  | 9                    | 9      |
| Some Education/ Religious Education | 10            | 10                 | 10                 | 10                   | 10     |
| Illiterate                          | 11            | 11                 | 11                 | 11                   | 11     |
| Others                              |               |                    |                    |                      |        |

**QL5.** Generally what jobs/ tasks do ..... (designation/role) they perform?

**QL6.** On a scale of 1 to 5, (where 5 = excellent, 4=good, 3=average, 2=poor and 1=very poor) generally how would you rate ..... (designation/role) on the tasks performed when they joined your retail outlets? (**SHOW CARD "N"**)

**QL7.** Do you provide any type of training to perform the job? (If yes =1 in QL7 then ask QL9)

**QL8.** On a scale of 1 to 5, (where 5 = excellent, 4=good, 3=average, 2, bad and 1=very poor) how would you rate ..... ( designation/role) on the tasks they performs now? (**SHOW CARD "N"**)

**QL9.** What type of training do you provide to them to perform the job?

**QL10.** What would you do/suggest to improve their skills to perform their current job more efficiently?

**Record all the answers in Grid D**

**GRID D**

|   |                             | QL5                    | QL6                                    | QL7                      | QL8                                 | QL9                  | QL10                                   |
|---|-----------------------------|------------------------|--|--------------------------|-------------------------------------|----------------------|--|
|   |                             | Role / Tasks Performed | Skills Level When Hired (SHOWCARD "N") | OJT Provided Yes =1 No=2 | Current Skills Level (SHOWCARD "N") | Type of OJT provided | Suggestions to improve the skill level |
| 1 | Store Manager               |                        |  |                          |                                     |                      |  |
| 2 | Senior sales Staff          |                        |  |                          |                                     |                      |  |
| 3 | Junior Sales Staff          |                        |  |                          |                                     |                      |  |
| 4 | Stock Keeper/Handler        |                        |  |                          |                                     |                      |  |
| 5 | Others.....(Please Specify) |                        |  |                          |                                     |                      |  |

**QL11.** Do you provide off-the job trainings to your employees at the retail outlets that are being managed by your organization

|     |   |             |
|-----|---|-------------|
| Yes | 1 | Continue    |
| No  | 2 | Go To QL16a |

**QL12.** Which are the specific job roles in the retailing sector for which you provide off -the -job trainings to your employees? (Record for each job role for which off- the- job -trainings are provided in column QL12)

**Ask QL13 to QL15 for each job role mentioned in QL12 for which Off-Job- Training is provided**

**QL13.** Can you please give us the details of the Training Courses/Name for ..... (Job Role mentioned in QL12)?

**QL14.** What is the normal duration of the Training Course ..... (Training course mentioned in QL13)?

**QL15.** Where/which institute do you send the employees for.....(Training course mentioned in QL13)?

| QL12                           |      | QL13            | QL14     | QL15               |
|--------------------------------|------|-----------------|----------|--------------------|
| Job Role 1                     | Code | Training Course | Duration | Training Providers |
| Store Manager                  | 1    |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
| Job Role 2                     |      | Training Course | Duration | Training Providers |
| Senior sales Staff             | 2    |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
| Job Role 3                     |      | Training Course | Duration | Training Providers |
| Junior Sales Staff             | 3    |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
| Job Role 4                     |      | Training Course | Duration | Training Providers |
| Stock Keeper/<br>Handler       | 4    |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
| Job Role 5                     |      | Training Course | Duration | Training Providers |
| Others.....(Please<br>Specify) | 5    |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |
|                                |      |                 |          |                    |

Skill Assessment

**QL16a.** In your opinion what are the skills required in the retail of footwear sector? Record all the answers under column QL16a (Unprompted)

The industry experts and TSPs have identified a number of skills required in the retail of footwear sector. The skills are listed on the card (**SHOW CARD “V”**) Please have a look at this card to answer our next few questions.

**QL16b.** In your opinion what are the skills required in the retail of footwear sector? Record all the answers under column QL16b.(Prompted)

For each of the skills mentioned in QLI6 ask QLI7 and QLI8

**QL17.** You have mentioned that \_\_\_\_\_ (skill) is required in the footwear sector, let me know if it is easy to find, hard to find or neither easy nor difficult to find (**SHOW CARD “P”**)?

**QL18.** In your opinion what would be the future need for \_\_\_\_\_ (Skills) will it increase, decrease or remain the same (**SHOW CARD “Q”**)?

**QL19** In your opinions which are the skills that are available in the market but do not match the required level/ standard (hard to fill skill)? (Record your answer in **QL19**)

For each of the skills mentioned in QLI9 ask QL20 – QL23

**QL20.** How many..... (Skills that are available in the market but does not match the required level/ hard to find skill) do you need in the next five years? (Record in column QL20)

**QL21.** What are the skills from the list you identified in **QL16** for which you feel Technical and Vocational training is required (Record in column **QL21**)

**QL22.** What are skills for which you think on-the-job training is best suited (Record in column **QL22**)

**QL23.** What are skills for which you think off-the-job training is best suited (Record in column **QL23**)



|                  | List of Possible Skills                       | Skills Required |                          | Skill Availability (SHOW CARD “P”) | Future Skill Needs (SHOW CARD “Q”) | Hard to Fill Skills | Number Required in next 5 years | Skills Where TVE is Required | OJT Required | Off-the-Job trainings required |
|------------------|---|-----------------|--------------------------|------------------------------------|------------------------------------|---------------------|---------------------------------|------------------------------|--------------|--------------------------------|
|                  |   | Un prompted     | Prompted (SHOW CARD “V”) |                                    |                                    |                     |                                 |                              |              |                                |
|                  |   |                 |                          |                                    |                                    |                     |                                 |                              |              |                                |
|                  |   | QL16a           | QL16b                    | QL17                               | QL18                               | QL19                | QL20                            | QL21                         | QL22         | QL23                           |
| Retailing Skills | 1. Merchandising Skill                        | 1               | 1                        |                                    |                                    | 1                   |                                 | 1                            | 1            | 1                              |
|                  | 2. Window/ Display/ Designing/Managing Skills | 2               | 2                        |                                    |                                    | 2                   |                                 | 2                            | 2            | 2                              |
|                  | 3. Customer Handling Skill                    | 3               | 3                        |                                    |                                    | 3                   |                                 | 3                            | 3            | 3                              |
|                  | 4. Cash Management                            | 4               | 4                        |                                    |                                    | 4                   |                                 | 4                            | 4            | 4                              |
|                  | 5. Problem Solving                            | 5               | 5                        |                                    |                                    | 5                   |                                 | 5                            | 5            | 5                              |
|                  | 6. Communication                              | 6               | 6                        |                                    |                                    | 6                   |                                 | 6                            | 6            | 6                              |
|                  | 7. Team building                              | 7               | 7                        |                                    |                                    | 7                   |                                 | 7                            | 7            | 7                              |
|                  | 8. Training                                   | 8               | 8                        |                                    |                                    | 8                   |                                 | 8                            | 8            | 8                              |
|                  | 9. Minor Shoe Repairing Skills                | 9               | 9                        |                                    |                                    | 9                   |                                 | 9                            | 9            | 9                              |
|                  | 10. Numeracy                                  | 10              | 10                       |                                    |                                    | 10                  |                                 | 10                           | 10           | 10                             |
|                  | 11. Work ethics                               | 11              | 11                       |                                    |                                    | 11                  |                                 | 11                           | 11           | 11                             |
|                  | 12. Literacy                                  | 12              | 12                       |                                    |                                    | 12                  |                                 | 12                           | 12           | 12                             |
|                  | 13. Language                                  | 13              | 13                       |                                    |                                    | 13                  |                                 | 13                           | 13           | 13                             |
|                  | 14. Other                                     |                 |                          |                                    |                                    |                     |                                 |                              |              |                                |

For Each of the hard to find skill mentioned in QL19 ask QL24 and QL25

QL24. What are the main causes of having hard - to- fill skills?

QL25. What is your organization doing to overcome the difficulties in finding these skills?

| Skill Code | QL24<br>Reasons |  | Code | QL25<br>Measures Taken |  | Code |
|------------|-----------------|--|------|------------------------|--|------|
|            |                 |  |      |                        |  |      |
|            |                 |  |      |                        |  |      |
|            |                 |  |      |                        |  |      |
|            |                 |  |      |                        |  |      |
|            |                 |  |      |                        |  |      |
|            |                 |  |      |                        |  |      |
|            |                 |  |      |                        |  |      |

**QL26.** What methods do you apply for hiring workers for the retails outlets that are being managed by your organization? (**SHOW CARD “S”**)

| Methods                         | Code |
|---------------------------------|------|
| Advertisements in Newspaper     | 1    |
| Referrals By Existing Employees | 2    |
| Notice at factory Gate          | 3    |
| Contact Labor Contractors       | 4    |
| Others .....(Please Specify)    |      |

**QL27.** What are the key selection and recruitment criteria in your organization for hiring workers for the retails outlets that are being managed by your organization?

| Selection And Recruitment Criteria<br>Middle Management Level | Code |
|---|------|
|   |      |
|   |      |
|   |      |
|   |      |
|   |      |
|   |      |

**QL28.** In future would you prefer to hire workers who hold Diploma/Certification from known TSPs in footwear retail related trades/technologies? If “Yes” record the trades (**SHOW CARD “V”**). If “No” Please give the reasons

| QL28 |   | Trades                                    |      |                             |      |
|------|---|---|------|-----------------------------|------|
|      |   |   | Code |                             | Code |
| Yes  | 1 | Merchandising Skill                       | 1    | Training                    | 8    |
|      |   | Window/ display designing/managing skills | 2    | Minor Shoe Repairing Skills | 9    |
|      |   | Customer handling skill                   | 3    | Numeracy                    | 10   |
|      |   | Cash Management                           | 4    | Work ethics                 | 11   |
|      |   | Problem Solving                           | 5    | Literacy                    | 12   |
|      |   | Communication                             | 6    | Language                    | 13   |
|      |   | Team building                             | 7    | Other                       |      |
| No   | 2 | Reasons                                   |      |                             | Code |
|      |   |   |      |                             |      |

**QL29.** For which types of workers your company does hiring for the retails outlets that are being managed by your organization?

*For each type of workers for which hiring is done ask*

**QL30.** Is the employee turnover for ..... (ASK For each type of workers for which hiring is done) has increased, decreased or remained the same during the last two years? (**SHOW CARD “W”**)

**QL31.** How many current vacancies, for staff of the retails outlets that are being managed by your organization, do you have at this moment?

| Type of Workers Hired       | Type Of Workers Hired<br>Q29 | Employee Turnover<br>Q30 | Number Of Vacancies<br>Q31 |
|-----------------------------|------------------------------|--------------------------|----------------------------|
| Store Manager               |                              |                          |                            |
| Senior sales Staff          |                              |                          |                            |
| Junior Sales Staff          |                              |                          |                            |
| Stock Keeper/ Handler       |                              |                          |                            |
| Others.....(Please Specify) |                              |                          |                            |
| Others.....(Please Specify) |                              |                          |                            |

**QL32.** At which level would you hire females? (**SHOW CARD “U”**)

| Role/ Designation           | Code |
|-----------------------------|------|
| Store Manager               | 1    |
| Senior sales Staff          | 2    |
| Junior Sales Staff          | 3    |
| Stock Keeper/ Handler       | 4    |
| Others.....(Please Specify) |      |
| Others.....(Please Specify) |      |

**QL33.** What are the hard-to-fill vacancies/jobs in your the retails outlets that are being managed by your organization and how many (even if these are currently filled)?

| Hard to Fill Vacancy        | Code | Number |
|-----------------------------|------|--------|
| Store Manager               | 1    |        |
| Senior sales Staff          | 2    |        |
| Junior Sales Staff          | 3    |        |
| Stock Keeper/ Handler       | 4    |        |
| Others.....(Please Specify) |      |        |
|                             |      |        |
|                             |      |        |
|                             |      |        |



**QL34.** What are the main causes of having hard to fill vacancies for jobs in your the retails outlets that are being managed by your organization?

| Job Code at Retail | Causes | Code |
|--------------------|--------|------|
|                    |        |      |
|                    |        |      |
|                    |        |      |
|                    |        |      |
|                    |        |      |
|                    |        |      |

**QL35.** What measures are being taken by your organization to overcome the difficulties regarding hard to fill vacancies for jobs in your the retails outlets that are being managed by your organization?

| Job Code at Retail | Measures | Code |
|--------------------|----------|------|
|                    |          |      |
|                    |          |      |
|                    |          |      |
|                    |          |      |
|                    |          |      |
|                    |          |      |

## CARDS

### SHOW CARD A

| QA1          |                                   |      |
|--------------|-----------------------------------|------|
| Company Size | Annual Sales Turnover (Rs.)       | Code |
| Micro        | Less than 1 Million               | 1    |
| Small        | 1 Million – 10 Million            | 2    |
| Medium       | 11 Million - 30 Million           | 3    |
| Large        | 31 Million – 50 Million and above | 4    |

### SHOW CARD B

| QA2/ QA5b                                       |      |
|---|------|
| Type of Products/Articles/Business Model        | Code |
| Outer Soles – Leather                           | 1    |
| Outer Sole - Rubber                             | 2    |
| Outer Soles – Plastic / Synthetic               | 3    |
| Upper – Leather                                 | 4    |
| Upper - Rubber                                  | 5    |
| Upper – Plastic / Synthetic                     | 6    |
| Upper – Textile                                 | 7    |
| Inner Soles                                     | 8    |
| Slippers /Slip- Ons / Flip Flop / Hawai Chappal | 9    |
| Sandles   | 10   |
| Shoes   | 11   |
| Joggers / Sports Shoes                          | 12   |
| Men's Shoes                                     | 13   |
| Ladies Shoes                                    | 14   |
| Children Shoes                                  | 15   |
| Army / Institutional Shoes                      | 16   |
| Safety Shoes                                    | 17   |
| Rubber Boots                                    | 18   |
| Leather Boots                                   | 19   |
| Others 1 (Please Specify)                       |      |

**SHOW CARD C**

| QA3          |  |      |
|--------------|--|------|
| Company Size | Number Of Pairs/Articles Produced Annually | Code |
| Micro        | Up to 10,000                               | 1    |
| Small        | 10001- 30000                               | 2    |
| Medium       | 30001- 60000                               | 3    |
| Large        | More than 60000                            | 4    |

**SHOW CARD D**

| QA6a                                    |      |
|---|------|
| Footwear Category / Base Material       | Code |
| Pure Leather                            | 1    |
| Synthetic / Artificial / Patent Leather | 2    |
| Textile / Fabric / Canvas               | 3    |
| Rubber                                  | 4    |
| Plastic                                 | 5    |
| Others .....(Please Specify)            |      |

**SHOW CARD E**

| QA6b                               |      |
|------------------------------------|------|
| Production Process                 | Code |
| Designing/ Pattern Making          | 1    |
| Cutting/Clicking                   | 2    |
| Edging                             | 3    |
| Sewing                             | 4    |
| Pasting                            | 5    |
| Trimming                           | 6    |
| Lasting                            | 7    |
| Pressing                           | 8    |
| Molding                            | 9    |
| Adding Embellishments/ Accessories | 10   |
| Embroidery                         | 11   |
| Buffing                            | 12   |
| Polishing                          | 13   |
| Labeling                           | 14   |
| Packing                            | 15   |
| Others.....(Please Specify)        |      |

**SHOW CARD F**

| QA6c                              |      |  |
|-----------------------------------|------|--|
| Production Process                | Code | Description  |
| Fully Automated                   | 1    | Where little or no human intervention is required once the process starts  |
| Semi - Automated                  | 2    | Where human intervention is required at various level of machine operations  |
| Manual-By Machine                 | 3    | Where job is performed by machine  |
| Manual –With Hand / tools         | 4    | Where job is performed manually/hand tools   |
| A Combination of Machine and Hand | 5    | Where some part of the work is performed by using machine and some part of the work is performed manually/hand tools |
| Others.....(Please Specify)       |      |  |

**SHOW CARD G**

| QA7                                      |      |
|--|------|
| Departments                              | Code |
| Design/ Pattern Making                   | 1    |
| Clicking/ Cutting                        | 2    |
| Closing/ Sewing/ Stitching/ Upper Making | 3    |
| Bottom/ Sole Making                      | 4    |
| Assembly                                 | 5    |
| Finishing                                | 6    |
| Packing                                  | 7    |
| Others.....(Please Specify)              |      |

**SHOW CARD H**

| QA8               |                     |      |
|-------------------|---------------------|------|
| Organization Size | Number of Employees | Code |
| Micro Scale       | Less than 10        | 1    |
| Small Scale       | 11-30               | 2    |
| Medium Scale      | 31-99               | 3    |
| Large Scale       | 100 and above       | 4    |



**SHOW CARD I**

| QB1/ QC6                          |      |
|-----------------------------------|------|
| Designation                       | Code |
| Pattern Makers / Design Engineers | 1    |
| Production Manager                | 2    |
| Quality Assurance Manager         | 3    |
| Procurement Manager               | 4    |
| Line In-charge / Line Manager     | 5    |
| Supervisors                       | 6    |
| Machine Operator / Technicians    | 7    |
| Other Skilled Workers             | 8    |
| Un Skilled Workers                | 9    |
| Others.....(Please Specify)       |      |

**SHOW CARD JA**

| QB2/ QC7a/ QL4                                 |      |
|--|------|
| Qualification (Education Level/ Certification) | Code |
| Professional                                   | 1    |
| MBA / Post Graduates                           | 2    |
| Graduates                                      | 3    |
| Diploma holder /DAE                            | 4    |
| Intermediate                                   | 5    |
| Matric   | 6    |
| Middle   | 7    |
| Primary  | 8    |
| Less than Primary                              | 9    |
| Some Education/ Religious Education            | 10   |
| Illiterate                                     | 11   |
| Others.....(Please Specify)                    |      |

**SHOW CARD JB**

| QB3/ QC7b                                      |      |
|--|------|
| Footwear Related Qualifications/Certifications | Code |
| Masters Program -MA                            | 1    |
| Bachelors Program - BA- BA(Hons)               | 2    |
| Advanced Diploma (2-3 years program)           | 3    |
| Diploma – 2 years                              | 4    |
| Diploma – 1 year                               | 5    |
| Certificates 12-6 months                       | 6    |
| Certificates 6-3 months                        | 7    |
| Certificates 3-1 months                        | 8    |
| Certificates Less than one month               | 9    |
| Workshops                                      | 10   |
| Online Programs / Distant Learning Programs    | 11   |
| Others ..... (Please Specify )                 |      |

**SHOW CARD K**

| QB5/ QC5/ QL3                           |      |
|---|------|
| Employment Status                       | Code |
| Permanent                               | 1    |
| Contractual                             | 2    |
| Daily Wagers Working on Hourly Rate     | 3    |
| Daily Wagers Working on Per Piece Rate  | 4    |
| Contractual Working on Commission Basis | 5    |
| Daily Wagers Working on Commission Base | 6    |
| Others                                  |      |

**SHOW CARD L**

| QB6/ QC2      |      |
|---------------|------|
| Age           | Code |
| < 15 years    | 1    |
| 15 – 20 years | 2    |
| 21 – 30 years | 3    |
| 31 – 40 years | 4    |
| 41 – 50 years | 5    |
| 51 – 60 years | 6    |
| > 60 years    | 7    |

**SHOW CARD M**

| QC4                    |      |
|------------------------|------|
| Years With The Company | Code |
| Less than one year     | 1    |
| 1-2 years              | 2    |
| 2-4 years              | 3    |
| 5-10 years             | 4    |
| 11-15 years            | 5    |
| 16-20 years            | 6    |
| More than 20 years     | 7    |

**SHOW CARD N**

| QB9/QB11/ QC9/ QC10/ QL6/ QL8 |      |  |
|-------------------------------|------|--|
| Skill Level                   | Code | Description  |
| Excellent                     | 5    | Expert/ Very Good at Work/ Needed No Training/ No Supervision Required |
| Good                          | 4    | Good at Work/ Needed Some Training/ Little Supervision Required        |
| Average                       | 3    | Neither Good nor Poor at Work/ Needed Training and Supervision         |
| Poor                          | 2    | Poor at Work/ Needed Lots of Training/ Regular Supervision Required    |
| Very Poor                     | 1    | Knew Nothing/ Needed Full Training/ Constant Supervision Required      |

**SHOW CARD O**

| QG1a  |   |                 |                     |
|---|---|-----------------|---------------------|
| List of possible skills                         |   | Required Skills | Hard To Find Skills |
| <b>Designing Skills</b>                         | 1. Footwear Designing Skills  | 1               | 1                   |
|   | 2. Pattern Making Skills  | 2               | 2                   |
|   | 3. Advanced IT / Software CAD/CAM                                   | 3               | 3                   |
| <b>Hand Craft Skills</b>                        | 4. Use of Basic Hand Tools  | 4               | 4                   |
|   | 5. Hand Sewing  | 5               | 5                   |
|   | 6. Hand Embroidery  | 6               | 6                   |
|   | 7. Cutting / pasting / lasting / trimming / Polishing / Finishing   | 7               | 7                   |
| <b>Simple Machine Operating skills</b>          | 8. Accessorizing / Labeling   | 8               | 8                   |
|   | 9. Sewing Machine Skills  | 9               | 9                   |
|   | 10. Material handling skills  | 10              | 10                  |
| <b>Plant / Complex Machine Operating skills</b> | 11. Labeling Machine / Embossing machine / Cutting Machine          | 11              | 11                  |
|   | 12. Air Blowing Machine Operating Skills                            | 12              | 12                  |
|   | 13. Plastic /Rubber Molding Machine                                 | 13              | 13                  |
|   | 14. Leather footwear processing machines                            | 14              | 14                  |
|   | 15. Lab inspection and testing                                      | 15              | 15                  |
| <b>Technical / practical</b>                    | 16. Cutting/Stitching machines operations                           | 16              | 16                  |
|   | 17. Leather Related Skills  | 17              | 17                  |
|   | 18. Color Matching and quality control during continuous production | 18              | 18                  |

| QG1a                    |   |                 |                     |
|-------------------------|---|-----------------|---------------------|
| List of possible skills |   | Required Skills | Hard To Find Skills |
| <b>Skills</b>           | 19. Product Evaluation Skills           | 19              | 19                  |
| <b>Soft Skills</b>      | 20. Communication                       | 20              | 20                  |
|                         | 21. Team building                       | 21              | 21                  |
|                         | 22. Training                            | 22              | 22                  |
|                         | 23. Problem solving                     | 23              | 23                  |
|                         | 24. Customer Handling                   | 24              | 24                  |
|                         | 25. Time management                     | 25              | 25                  |
|                         | 26. Adaptability/flexibility            | 26              | 26                  |
| <b>Basic Skills</b>     | 27. English Language                    | 27              | 27                  |
|                         | 28. Other Language (Urdu, Punjabi.etc.) | 28              | 28                  |
|                         | 29. Literacy                            | 29              | 29                  |
|                         | 30. Numeracy                            | 30              | 30                  |
|                         | 31. Work ethics                         | 31              | 31                  |
|                         | 32. Health and safety                   | 32              | 32                  |
|                         | 33. Others.....(Please Specify)         |                 |                     |

**SHOW CARD P**

| QG2/ QL17                     |      |
|-------------------------------|------|
| Skill Availability            | Code |
| Easy to Find                  | 1    |
| Neither Easy Nor Hard to Find | 2    |
| Hard to Find                  | 3    |

**SHOW CARD Q**

| QG3/ QL18            |      |
|----------------------|------|
| Future Skill Needs   | Code |
| Will Increase A Lot  | 5    |
| Will Increase        | 4    |
| Will Remain The Same | 3    |
| Will Decrease        | 2    |
| Will Decrease A Lot  | 1    |



**SHOW CARD R**

| QD4/ QH12        |      |
|------------------|------|
| Duration         | Code |
| Day Course(S)    | 1    |
| Less Than 1 Week | 2    |
| 1 Week           | 3    |
| 2 Week           | 4    |
| 3 Week           | 5    |
| One Month        | 6    |
| 2 Month          | 7    |
| 3 Month          | 8    |
| 6 Month          | 9    |
| One Year         | 10   |
| 2 Year           | 11   |
| Others           |      |

**SHOW CARD S**

| Q11/ QL26                       |      |
|---------------------------------|------|
| Methods                         | Code |
| Advertisements In Newspaper     | 1    |
| Referrals By Existing Employees | 2    |
| Notice At Factory Gate          | 3    |
| Contact Labor Contractors       | 4    |
| Others .....(Please Specify)    |      |

**SHOW CARD T**

| QD3/ Q13                          |  |      |
|-----------------------------------|--|------|
| Trades                            | Contents   | Code |
| Basic Shoe Making                 | Basic Shoe Making /Fundamentals Of Shoe Making   | 1    |
| Feet Anatomy                      | Feet Anatomy/Measuring Feet/Foot Specifications/Measuring & Fitting  | 2    |
| Footwear Designing                | Footwear Designing   | 3    |
| Pattern Making                    | Pattern Making   | 4    |
| Leather Technology                | Leather Handling Techniques/Leather Grading Etc.   | 5    |
| Shoe Lasting                      | Shoe Last Designing/Last Making /Modifications / Hand Lasting Techniques/Machine Lasting / Designing On Last | 6    |
| Shoe Assembling                   | Shoe Construction Methods /Shoe Assembling   | 7    |
| Cutting/Clicking                  | Pattern Cutting/Cutting/Clicking   | 8    |
| Hand Stitching                    | Sewing/Stitching By Hand   | 9    |
| Machine Stitching                 | Sewing/Stitching By Machine  | 10   |
| Upper Making                      | Shoe Upper Making/Stitching  | 11   |
| Bottom Making                     | Bottom Work - Outsoles / Insoles/Soling/Heeling  | 12   |
| Closing                           | Shoe Closing   | 13   |
| Finishing                         | Shoe Finishing / Applying Finishes/ Perform Footwear Finishing Operations                                    | 14   |
| Basic Hand Tools                  | Basic Hand Tools Using Techniques  | 15   |
| Basic Machine                     | Basic Machine Using Techniques   | 16   |
| Material Handling                 | Material Handling Techniques / Identify Materials Used In Footwear Production                                | 17   |
| Performing Table Based Operations | Performing Table Based Operation S   | 18   |
| Molding                           | Molding /Perform Molding Operation   | 19   |
| Shoe Repairing                    | Repair Footwear Product/Shoe Repairing   | 20   |
| Machine Repair/Maintenance        | Machinery Repairing /Perform Minor Maintenance   | 21   |
| Cad/Cam                           | Computer Aided Design/ Manufacturing For Footwear/   | 22   |
| Quality Control                   | Perform Test Or Inspection To Check Product Quality/Quality Assurance/ Quality Control                       | 23   |
| Others .....(Please Specify)      | .....  |      |

**SHOW CARD U**

| QL2/ QL32               |      |
|-------------------------|------|
| Retail Designation/Role | Code |
| Store Manager           | 1    |
| Senior Sales Staff      | 2    |
| Junior Sales Staff      | 3    |
| Stock Keeper/ Handler   | 4    |
| Others                  |      |

**SHOW CARD V**

| QL16b/ QL28                                  |                 |                     |
|--|-----------------|---------------------|
| Retail Section: List of possible skills      | Required Skills | Hard to Find Skills |
| 1. Merchandising Skill                       | 1               | 1                   |
| 2. Window/Display /Designing/Managing Skills | 2               | 2                   |
| 3. Customer Handling Skill                   | 3               | 3                   |
| 4. Problem Solving                           | 4               | 4                   |
| 5. Communication                             | 5               | 5                   |
| 6. Team building                             | 6               | 6                   |
| 7. Training                                  | 7               | 7                   |
| 8. Numeracy                                  | 8               | 8                   |
| 9. Work ethics                               | 9               | 9                   |
| 10. Literacy                                 | 10              | 10                  |
| 11. Language                                 | 11              | 11                  |
| 12. Others.....(Please Specify)              |                 |                     |

**SHOW CARD W**

| Q30               |      |
|-------------------|------|
| Employee Turnover | Code |
| Increase          | 1    |
| Same              | 2    |
| Decrease          | 3    |

**Interview Guidelines**  
**TSPs**

|     |  |     |   |
|-----|--|-----|---|
| 1.  | Name :   | 2.  | Job Title :   |
| 3.  | Name of Organization :   |     |   |
| 4.  | Telephone :  | 5.  | Fax :   |
| 6.  | Email :  | 7.  | Website :   |
| 8.  | Year Of Establishment : 1  | 9.  | Type of entity :  |
| 10. | Total number of Permanent Employees: _____<br>(including general and instructional/teaching staff) | 11. | Total Instructional /teaching staff:<br>Permanent:_____<br>Part Time/Visiting:_____   |
| 12. | Total number of current students :____<br>(stitching course only)                                  | 13. | Number of students passed out in last five years or since inception : _____<br>(Please try to acquire Average No. of students passed out / year_____) |
| 14. | Average graduates/certificates and diploma holders your institution produce per year : _____       | 15. | Do conduct Regular Audits :(Yes /No)  |
| 16. | How many branches/ affiliated institutes you have in Pakistan: _____                               | 17. | How many of them are in Punjab ?<br>(Please provide complete addresses, contact person/s and telephone numbers)                                       |

|       |  |  |                      |                                    |
|-------|--|--|----------------------|------------------------------------|
| A.    | What are the various course levels offered |  |                      |                                    |
|       | Technical Education                        |  | Vocational Education |                                    |
|       | at1  | B.Tech. (Degree) ( )                               | av1                  | Vocational Diploma (1-2 years) ( ) |
|       | at2  | B.Tech. (Hons.) ( )                                | av2                  | Diploma G-II (2 years) ( )         |
|       | at3  | DAE ( )  | av3                  | Diploma G-III (1 year) ( )         |
|       | at4  | Diploma (1 Year) ( )                               | av4                  | Certificate-6 months ( )           |
|       | at5  | Post Diploma (1 Year) ( )                          | av5                  | Certificate-3 months ( )           |
|       |  |  | av6                  | Special Training Program ( )       |
|       | Get the list of all the courses offered    |  |                      |                                    |
|       | B.   | PARTNERSHIPS: Yes _____ No _____(If Yes name them) |                      |                                    |
| Local |  | International                                      |                      |                                    |
|       |  |  |                      |                                    |
|       |  |  |                      |                                    |
|       |  |  |                      |                                    |
|       |  |  |                      |                                    |
|       |  |  |                      |                                    |



**C. ACCREDITATIONS:** Yes \_\_\_\_\_ No \_\_\_\_\_ (If Yes name them)

| Local | International |
|-------|---------------|
|       |               |
|       |               |
|       |               |
|       |               |
|       |               |
|       |               |
|       |               |
|       |               |

**D. Main Question**

- Programs/courses offered by the Institute

Sub Questions

**Q1.** What are the various programs /courses offered by your institute?

*Ask Q2 to Q8 for the programs /courses offered by the institute, record all answers in "GRID A"*

**Q2.** What are the eligibility criteria for the admission in the ..... (Programs / courses)?

2a) Is there any age limit?

2b) Is there any minimum qualification?

2c) Is the course available for both Male and Female?

**Q3.** What is the duration of ..... (Program/course)?

**Q4.** What is the total fee (including materials /other charges) for ..... (Program / course)?

**Q5.** What is the total number of seats available for .....(Program/course)?

**Q6.** How many students have registered this year for .....(Program / course)?

**D. Main Question**

- Programs/courses offered by the Institute

Sub Questions

**Q1.** What are the various programs /courses offered by your institute?

*Ask Q2 to Q8 for the programs /courses offered by the institute, record all answers in "GRID A"*

**Q2.** What are the eligibility criteria for the admission in the ..... (Programs / courses)?

2a) Is there any age limit?

2b) Is there any minimum qualification?

2c) Is the course available for both Male and Female?

**Q3.** What is the duration of .....(Program/course)?

**Q4.** What is the total fee (including materials /other charges) for .....(Program / course)?

**Q5.** What is the total number of seats available for .....(Program/course)?

**Q6.** How many students have registered this year for .....(Program / course)?

**Q7.** Which key footwear trade/technology do you cover under this program?

**Q8.** Could you briefly let us know the course content/main topics/skills covered under each course?

**Q9.** Can you provide the examining body for the course offered?

GRID "A"

| S.No | Program | Eligibility Criteria |           |                    | Course Duration | Fee Structure | No. Of Seats Available | Total No Of Registered Students |   | Key Trade | Course Content |  |  |  | Examining Body |  |
|------|---------|----------------------|-----------|--------------------|-----------------|---------------|------------------------|---------------------------------|---|-----------|----------------|--|--|--|----------------|--|
|      |         | Q2(a, b ,c)          |           |                    |                 |               |                        | Q6                              |   |           | Q8             |  |  |  |                |  |
|      |         | Age                  | Education | Gender (M, F, M/F) |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 1.   |         |                      |           |                    |                 |               |                        | M                               | F | Q7        |                |  |  |  | Q9             |  |
| 2.   |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 3.   |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 4.   |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 5.   |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 6.   |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 7.   |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 8.   |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 9.   |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |
| 10.  |         |                      |           |                    |                 |               |                        |                                 |   |           |                |  |  |  |                |  |

|    |  |
|----|--|
| D. | <b>Q10a.</b> Do you have a mechanism to track graduates' employment status and other details? (Ask for documents/online data / records)  |
|    | <b>Q10b.</b> For each course (mentioned in list), how soon (average) do previously unskilled graduates acquire jobs after completing the training course?.(Ask for records / data) |

| S. No | Program | Mechanism to track Alumni/Alumni Status (Q10a) | Employee status after graduation (Q10b) |
|-------|---------|--|---|
| 1.    |         |  |   |
| 2.    |         |  |   |
| 3.    |         |  |   |
| 4.    |         |  |   |
| 5.    |         |  |   |
| 6.    |         |  |   |
| 7.    |         |  |   |
| 8.    |         |  |   |
| 9.    |         |  |   |
| 10.   |         |  |   |



**D. Ask Q11 to Q16 for the programs /starting salary, Employment status, Declined application, Reasons & Rating of Attributes, record all answers in “GRID B”**

**Q11.** What starting salary are your graduates offered after successfully completing the course?

**Q12.** Against which Programs/Courses employment stats/employability ratio are better, please mention your answer in percentage

**Q13.** Which course is most popular / in demand? Please Rank them on the basis of the applications you receive against each course?

*If the total number of seats available (Q5) is greater than total number of registered students (Q6) Ask Q13a*

**Q13a.** The total number of seats available is equal and greater than the total number students registered for this course. Have you declined applications in this particular course due to unavailability of seats?

If Yes in **Q13a** ask **Q13b**

**Q13b.** Could you please let us know how many applications have you declined due limited seats in the course?

*If the total number of seats available (Q5) is less than total number of registered students (Q6) ask Q14*

**Q14.** The total number of seats available is less than the total number students registered for this course. What were the reasons for this?

**Q15.** The students make a selection of courses on various key attributes. On scale of 1 to 5 (where 5 = “High in Demand” and 1= “Not at all in Demand”).

**Q16.** After successful completion of course(s) (listed) where the graduates moved? e.g. which footwear trade/sector? Which companies? Any other comments please mention?

**GRID “B”**

| S.No | Program | Starting Salary | Employment Status | Declined applications (Q10) |      | Reasons | Rating Of Attributes |           |               |                 |                  |                 |                     |                       |  | Post Successful course completion (Q16) |          |
|------|---------|-----------------|-------------------|-----------------------------|------|---------|----------------------|-----------|---------------|-----------------|------------------|-----------------|---------------------|-----------------------|--|---|----------|
|      |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
|      |         |                 |                   | Q13a                        | Q13b | Q14     | Qualification        | Age Limit | Fee Structure | Course Duration | Demand in Market | Starting salary | Access to Institute | Employ ability factor | On the job training / internship opportunity | Sector/ trade/ Company                  | Comments |
| 1.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 2.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 3.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 4.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 5.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 6.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 7.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 8.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 9.   |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |
| 10.  |         |                 |                   |                             |      |         |                      |           |               |                 |                  |                 |                     |                       |  |   |          |

|  |  |
|--|--|
|  | <p><b>Q17.</b> What type of equipments / machinery / tools are you using for training purposes<br/><i>(LIST ALL MENTIONED)</i></p> <p><b>Q17a.</b> Are they harmonized with current industry demand? (Y/N).<br/>Any other Comments please mention?</p> |
|--|--|

**GRID “C”**

| S.No | Machinery / Equipments / Tools |                                |                  |
|------|--------------------------------|--------------------------------|------------------|
|      | List of Machineries<br>Q17     | Harmonized<br>( Y/ N )<br>Q17a | Comments<br>Q17a |
| 1.   |                                |                                |                  |
| 2.   |                                |                                |                  |
| 3.   |                                |                                |                  |
| 4.   |                                |                                |                  |
| 5.   |                                |                                |                  |
| 6.   |                                |                                |                  |
| 7.   |                                |                                |                  |
| 8.   |                                |                                |                  |
| 9.   |                                |                                |                  |
| 10.  |                                |                                |                  |

|           |  |
|-----------|--|
| <b>D.</b> | <p><b>Main Question</b></p> <ul style="list-style-type: none"> <li>What are the selection criteria for Footwear Trades/sub-sections/technologies for which trainings/courses are offered?</li> </ul> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>Who is involved in selection of these trades</li> <li>What is the key selection criteria for selecting / finalizing Footwear trade/technology, for which training courses are offered</li> <li>Do you have any written policy or procedure for envisaged selection</li> <li>Do you conduct any survey before selecting a trade/technology</li> <li>Do you obtain opinion of the industry experts before selecting a trade</li> <li>Do you get any request to develop / introduce industry specific trades</li> <li>Do you regularly check for new courses available abroad for specific trade/technology for which you are offering courses/trainings</li> </ul> <p>Response:</p>  |
| <b>E.</b> | <p><b>Main Question</b></p> <ul style="list-style-type: none"> <li>Development of Curriculum/course content</li> </ul> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>What are the envisaged objectives of the curriculum</li> <li>What organizations Industry / Business are responsible for development of curriculum</li> <li>Who are involved in designing, reviewing and finalizing the curriculum</li> <li>Do you involve education professionals specializing in designing curriculum</li> <li>Do you involve footwear industry experts in the curriculum development process for the specific trades / technologies</li> <li>Importance of inclusion of experts from industry in the curriculum development committees.</li> <li>Do you review the curriculum of the benchmark and comparator countries while developing the curriculum</li> <li>How often do you review the existing curricula</li> <li>How often is the curriculum is revised to keep it up-to-date with the changing technology and with similar courses/curriculum being offered abroad</li> <li>When the present curriculum was last revised?</li> <li>Is there uniform curriculum used in all schools offering same option</li> <li>Does the curriculum have life skills and work skills (employability skills) integrated in to it</li> <li>To what extent the curriculum content are related to the requirements of the job</li> <li>Market</li> </ul> |
| <b>F.</b> | <p><b>Main Question</b></p> <p><b>Selection and Recruitment of The Training Staff</b></p> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>Who are involved in Selection and Recruitment of The Training Staff</li> <li>Do you involve industry experts in the selection/recruitment process for the specific Footwear trades/technologies</li> <li>Do you involve education professionals in the Selection and Recruitment of The Training Staff</li> </ul>   |



|           |   |
|-----------|---|
|           | <ul style="list-style-type: none"> <li>Do you review the job profiles/job description of the training staff of developed/underdeveloped countries during the selection/recruitment process</li> <li>Is there any requirement of Industrial Experience for Technical subject teachers?</li> <li>Do you provide pre-service training to your general staff</li> <li>Do you provide training to the instructional staff</li> <li>Are there specialized teachers for teaching technical subjects</li> <li>Are there organized Professional Development / Capacity building Programs for your teachers?</li> <li>Do you have industry experts who visit regularly to provide training to the teaching staff</li> <li>Are the pay scales of Technical Subject Teachers same as those of general education teachers?</li> <li>Is there any ladder of promotion available to them</li> <li>How favorable are the avenues of promotion as compared to those offered to teachers belonging to the mainstream/non-TVET education system?</li> <li>Are modern Teaching-Learning Resources including, training manuals and materials, machinery &amp; equipment and other training tools available to your teachers in schools for effective teaching</li> <li>Do your teachers have the management's support for execution of duties</li> </ul> |
| <b>G.</b> | <b>Main Question</b><br><b>Post Training Facilities</b><br><u>Sub Questions</u> <ul style="list-style-type: none"> <li>Do you provide any post training facilities to your passing out students e.g. facilitation in providing Jobs or internships/On the floor training</li> <li>Do you have any industry liaison office/management and what are their roles in building strong relationship of your institution with the industry (e.g. graduate alumni portals, providing knowledge of online job portals, organizing job fairs etc.)</li> <li>Do you keep records for your passed out graduates/students employability ratio</li> <li>If yes please share the ratios for the past 5 years or since inception</li> <li>How many of your students in last five years have become trainers and providing successful trainings in your institute</li> <li>In your opinion are there any gaps between the skills set of trainees and industry requirement</li> </ul>   |
| <b>H.</b> | <b>Main Question</b><br><b>Plans for Expansion</b><br><u>Sub Questions</u> <ul style="list-style-type: none"> <li>Are you happy with your existing infrastructure / facilities your institute is providing, if answer is 'NO' then please ask for reasons</li> <li>What is your current source of funding(s), please list all</li> <li>Do you have any recent or next 5 years plans for expansion (Yes /No)</li> <li>If yes then please explain which type of expansions are you anticipating (e.g. expansions in overall capacity, introduction of new courses and technologies, global / national business expansion etc.</li> <li>For above envisioned expansion(s) are you exploring options (other than your current source of funding) for investment by public/industry/private</li> </ul>   |

|           |  |
|-----------|--|
|           | providers/investors or your institution is self-sufficient for envisaged expansion   |
| <b>I.</b> | <b>Main Question</b><br><b>Awareness of PSDF</b><br><u>Sub Questions</u> <ul style="list-style-type: none"> <li>Do you know about PSDF its role, vision , mission and responsibilities in Punjab</li> <li>In your opinion how PSDF can help your institution (e.g. in future skill demands of your teachers, finalization and selection of latest curricula, etc.) and footwear industry of Punjab.</li> <li>Are you aware of or have you heard about PSDF's model of funding privately-delivered trainings through a competitive bidding process, if their answer is 'NO' then please share details with respondent</li> <li>Would you be interested in bidding as a TSP if PSDF were to launch a similar scheme for the footwear sector</li> <li>Any suggestions or improvements you recommend for PSDF Response</li> </ul>  |
| <b>J.</b> | <b>Main Question</b><br><b>Intention to Add trades/technologies/courses and international certifications related to footwear</b><br><u>Sub Questions</u> <ul style="list-style-type: none"> <li>Would you like to offer new courses/trades/ technologies related to footwear trainings you are successfully conducting</li> <li>In your opinion will it be easy to design courses related to footwear or not(ask for reasons and main challenges)</li> <li>Do you know which type of courses are available abroad</li> <li>Do you have plans for introducing / conducting these courses in your institute/in Pakistan</li> <li>How will you successfully procure these courses in Pakistan</li> <li>What type of international certifications you are planning to acquire in near future or in next 5 years (please list down)</li> <li>Do you have the existing capacity or planning for future expansion; for providing options of distance learning or online testing if required for attaining above certifications</li> </ul> |



| Q7-Course Content  | Code |
|--|------|
| Designing /Sketching   | 1    |
| Pattern Making   | 2    |
| Cutting /Clicking  | 3    |
| Stitching /Sewing  | 4    |
| Closing  | 5    |
| Upper Making   | 4    |
| Lasting/Last Making  | 6    |
| Finishing Techniques   | 7    |
| Perform Moulding Operations  | 8    |
| Material Technology /Material Science  | 9    |
| Product Development  | 10   |
| Operate Computing Technology In Footwear Work Place  | 11   |
| Shoe CAD   | 12   |
| Use Of Software Like Shoe CAM/CAE , Crispin, Coral Draw, Photoshop   | 13   |
| Advance Technology   | 14   |
| Merchandising, Footwear Retail   | 15   |
| Minor Machine Maintenance /Repair  | 16   |
| Quality Assurance/ Control   | 17   |
| Shoe Repairing   | 18   |
| Costing /Basic Costing   | 19   |
| Work Safety  | 20   |
| Language   | 21   |
| Research And Apply Techniques For The Design Of Wearable Objects   | 22   |
| Procurement  | 23   |
| Basic Business Planning  | 24   |
| General/Applied Management(Marketing, Management, Finance/Financial Controls, Human Resource Management, Setting Up A Business/ Entrepreneurship Development /Industrial /Cost Accountancy | 25   |

| Q12 - Course Content | Rating on Key Attributes |
|----------------------|--------------------------|
| Excellent            | 5                        |
| Good                 | 4                        |
| Average              | 3                        |
| Not So Good          | 2                        |
| Not at All Good      | 1                        |

### In-depth Interviews Guideline Industry Experts

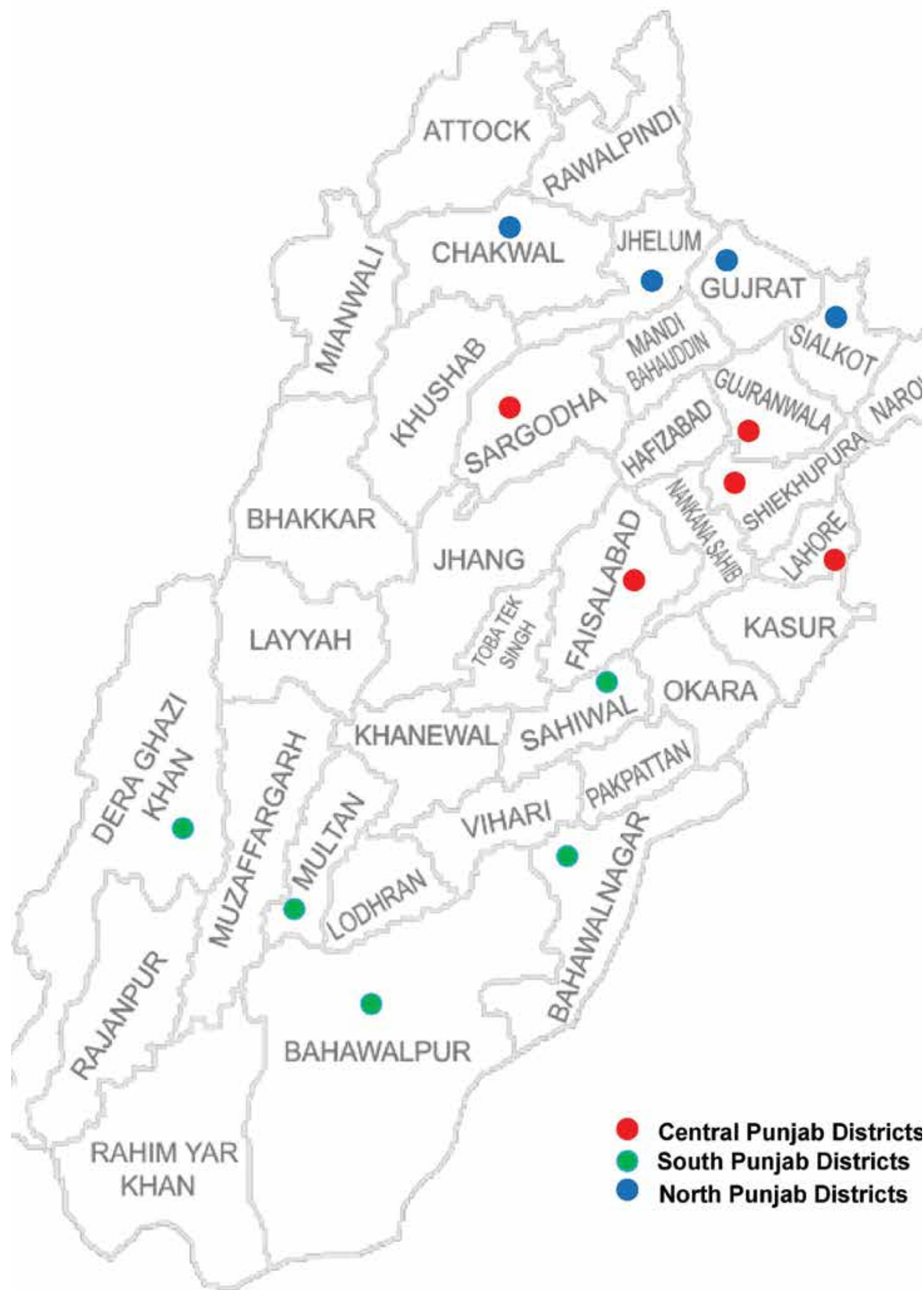
#### DISCUSSION POINTS – Take Notes

| <b>1.</b>                        | <p><b>Main Question</b><br/><b>Global Footwear Industry</b></p> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>What have been the major strengths and challenges of global footwear industry in last 5 years (in terms of technology, Human resource, industry trends etc.)</li> <li>Where do you see the global industry going in the next 5 years? What major developments to do you foresee? Business as usual?</li> <li>What will be the key success factors and opportunities for the global industry in next five years (especially in terms of trading, business development, global business expansion for countries like UK, GERMANY, INDIA, CHINA, etc.)</li> </ul>   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
|----------------------------------|---|----------------------------------|-----------------|------------|---------------------------|--|--|---------|--|--|--------|--|--|--------|--|--|---------|--|--|---------|--|--|----------|--|--|-------------------|--|--|------------------|--|--|---------------|--|--|-------|--|--|-------|--|--|
| <b>2.</b>                        | <p><b>Main Question</b><br/><b>Pakistan Footwear Industry</b></p> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>What have been the most significant challenges for the footwear sector in Pakistan in the last five years? Which challenges will be there in the next five years?</li> <li>What will be the possible threats in your opinion for Footwear industry in next 5 years (e.g. global domestic economies, Chinese and Thailand's footwear products etc.)</li> <li>Please tell us about any technological/operational advancements which you foresee (in the next 2 years) in envisaged sector. How will the existing workforce tackle this challenge and what skill set would be required</li> <li>Please tell us (in percentage) the local demand of footwear products and how this demand is being served by the industry</li> </ul>   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| <b>3a.</b>                       | <p><b>Main Question</b><br/><b>Shoe Making Process-Skills required</b></p> <p><u>Sub Questions</u><br/>From the key steps identified below could you please tell us what skills are required to perform these steps? In your opinion are there any skills gaps to perform these jobs? If 'yes' Why? If 'no' 'Why not'?</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #007bff; color: white;"> <th style="width: 35%;">Key Steps in shoe making process</th> <th style="width: 30%;">Skills Required</th> <th style="width: 35%;">Skills gap</th> </tr> </thead> <tbody> <tr><td>Designing/ Pattern Making</td><td></td><td></td></tr> <tr><td>Cutting</td><td></td><td></td></tr> <tr><td>Edging</td><td></td><td></td></tr> <tr><td>Sewing</td><td></td><td></td></tr> <tr><td>Pasting</td><td></td><td></td></tr> <tr><td>Lasting</td><td></td><td></td></tr> <tr><td>Moulding</td><td></td><td></td></tr> <tr><td>Buffing/Polishing</td><td></td><td></td></tr> <tr><td>Labeling/Packing</td><td></td><td></td></tr> <tr><td>Others: _____</td><td></td><td></td></tr> <tr><td>_____</td><td></td><td></td></tr> <tr><td>_____</td><td></td><td></td></tr> </tbody> </table> | Key Steps in shoe making process | Skills Required | Skills gap | Designing/ Pattern Making |  |  | Cutting |  |  | Edging |  |  | Sewing |  |  | Pasting |  |  | Lasting |  |  | Moulding |  |  | Buffing/Polishing |  |  | Labeling/Packing |  |  | Others: _____ |  |  | _____ |  |  | _____ |  |  |
| Key Steps in shoe making process | Skills Required   | Skills gap                       |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Designing/ Pattern Making        |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Cutting                          |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Edging                           |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Sewing                           |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Pasting                          |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Lasting                          |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Moulding                         |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Buffing/Polishing                |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Labeling/Packing                 |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| Others: _____                    |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| _____                            |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |
| _____                            |   |                                  |                 |            |                           |  |  |         |  |  |        |  |  |        |  |  |         |  |  |         |  |  |          |  |  |                   |  |  |                  |  |  |               |  |  |       |  |  |       |  |  |

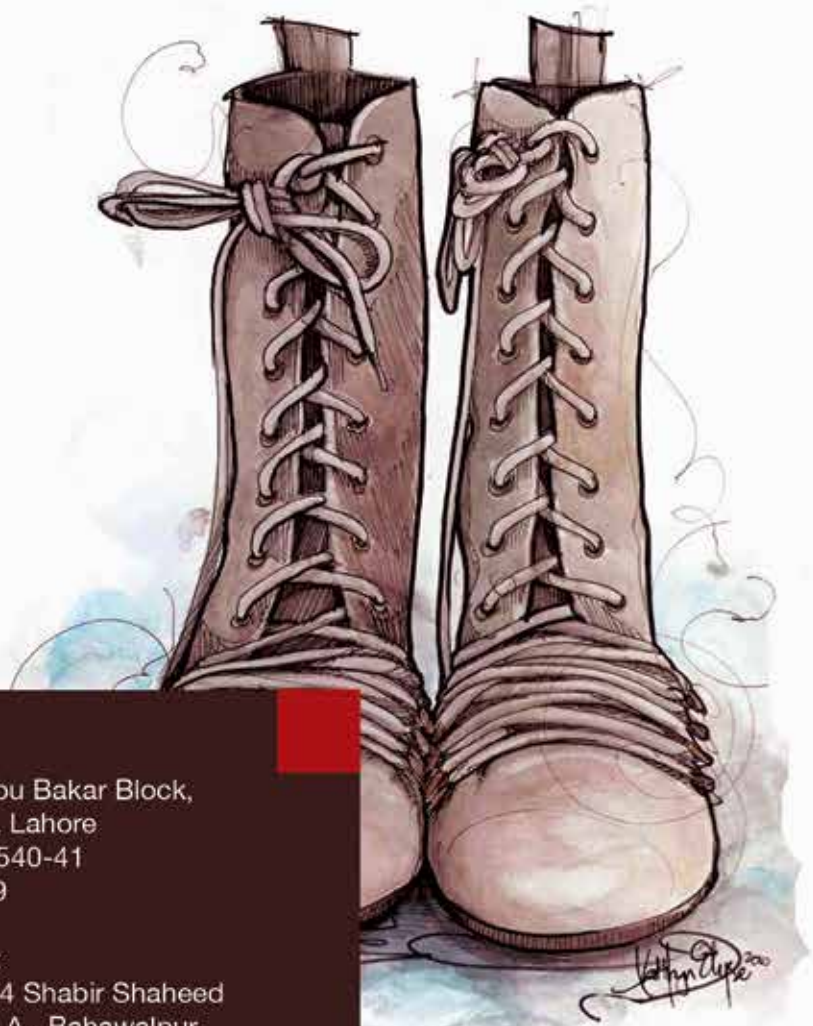


|     |   |
|-----|---|
| 3b. | <p><b>Main Questions</b></p> <p><b>Assessments of Skills Requirement and Skills Gaps</b></p> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>• In your opinion, whether the demand/gap is expected to rise/fall in the coming years? Please provide reasons, why?</li> <li>• What factors could possibly be impacting this demand?</li> <li>• What policy interventions in terms of TVET/ skills development do we need, in your opinion, to close this gap?</li> </ul>  |
| 4a  | <p><b>Main Questions</b></p> <p><b>On -the -Job /Off –the-Job Trainings opportunities</b></p> <p><u>Sub questions</u></p> <ul style="list-style-type: none"> <li>• What role do the major industry players have in providing on-the job trainings? Enhancing skill levels</li> <li>• Will the industry players be willing to provide on-the-job training to recent graduates? If yes, what are the various trades/skills for which the companies will be willing to provide on-the-job training to unemployed people</li> <li>• What role do the minor industry players have in providing on-the job trainings? Enhancing skill levels</li> </ul>   |
| 4b  | <p><b>Main Questions</b></p> <p><b>Off –the-job training (TSPs/TVET)</b></p> <p><u>Sub questions</u></p> <ul style="list-style-type: none"> <li>• What do you think of the quality levels of current TSPs/TVET, are there any gaps in your opinion?</li> <li>• What remedies do you suggest for these gaps</li> <li>• In your opinion, can industry players help TSPs in skilling/ up-skilling (enhancing skill levels) of individuals other than those employed by them? How please explain?</li> </ul>  |
| 5.  | <p><b>Main Question</b></p> <p><b>Training and Education in the Footwear Sector</b></p> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>• Has the availability of training in Pakistan for the people who wish to be employed in the footwear sector changed in the last 5 years? If yes then what sort of trainings in your opinion?</li> <li>• Can you please let me know for the various job functions where you feel training is required/should be, what level/levels of training can be provided here? Please explain</li> </ul> <p><u><b>Training Institutes/Vocational and Technical Training Centers’ Awareness</b></u></p> <ul style="list-style-type: none"> <li>• What is your opinion of the various Technical and Vocational Education Centers in Punjab, e.g. your opinion on their coverage, performance and current status?</li> <li>• What are your opinions on things these TSPs need to be doing to provide the footwear sector with essential skills it needs?</li> <li>• Do companies in the footwear sector prefer to hire employees holding certification / diploma from these institutions over non trained staff?</li> </ul> |

|    |  |
|----|--|
|    | <p><u><b>Involvement with TVET/TSP in Developing Curricula, Teachers Training, Assessments</b></u></p> <ul style="list-style-type: none"> <li>• Is there any involvement of the footwear Industry in TVET/TSP, If ‘yes’ how is the footwear industry involved and on what model/options do they operate</li> <li>• Suggestions for improving coordination and building strong relationships between the Industry Experts with the TVET/TSP.</li> <li>• Is there any involvement of footwear Industry / Business sector in the development of TVET/TSP curricula</li> <li>• Relevance of curriculum with the requirements of the job market</li> <li>• Should there be involvement of Industry in the examination/assessment</li> <li>• Should the industry be involved in formulating policy and selection and recruitment process of teachers?</li> </ul>   |
| 6. | <p><b>Main Question</b></p> <p><b>Awareness about PSDF</b></p> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>• Do you know about PSDF?</li> <li>• In your opinion how PSDF can help Footwear industry of Pakistan/Punjab (e.g. future skill demands of professionals, etc.)</li> <li>• Do you know about PSDF’s programs/schemes for envisaged sector</li> <li>• Any suggestions or improvements you recommend for PSDF</li> </ul>  |
| 7. | <p><b>Main Question</b></p> <p><b>Government Sector</b></p> <p><u>Sub Questions</u></p> <ul style="list-style-type: none"> <li>• What plans do Government officials have at the moment to support and for continuous growth of footwear sector</li> <li>• What key measures, in your opinion that is to be taken to support/grow the envisaged industry and to increase footwear exports?</li> <li>• In your opinion, what type of strategic policies/policy changes are required to effectively attain above objectives?</li> <li>• In your opinion how Pakistani Footwear manufacturers can increase exports? How is the Government helping and how Government can help further?</li> <li>• Where is the sector heading? Locally? Internationally? (In terms of exports, imports, value chains, etc.)</li> <li>• How can the government support research and development in this sector?</li> <li>• How can the Government support training and skills development?</li> <li>• There is a lack of technical (CAD/CAM system etc.) and supervisory staff which is essential to meet challenges of international market, what actions Government is taking to overcome this shortage (e.g. development of footwear fashion and design institutes equipped with CAD/CAM systems, scholarships to promising professionals, help in enhancing capacities of existing TSPs/TVET etc.)</li> </ul> |







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