

資料 3 調査訪問先への事前質問票及び回答
(1) PITACへの第1回質問票及び回答

**QUESTIONNAIRE FOR THE PRELIMINARY STUDY TEAM
ON THE PROPOSED PROJECT
ON BALANCING AND MODERNIZATION OF
WORKSHOP FACILITIES AT PITAC, LAHORE**

We, JICA, have received a proposal for the project on “Balancing and Modernization of Workshop Facilities at PITAC, Lahore” (hereinafter referred to as “PC-1 Form”) through the Ministry of Foreign Affairs of the Japanese Government. Receiving the “PC-1 Form”, we are planning to dispatch Preliminary Study Team in early April, 2000 in order to re-examine the feasibility of the proposed project and to discuss the framework for implementing the project.

For preparing the study team, we would like to ask in advance some questions as attached document. We would appreciate it if you could answer the questions in writing and send the answer back to JICA Pakistan Office by March 10, 2000.

Further to the questions at this time, we might send additional questionnaire for supplement information later on. We would like your understanding and cooperation.

February 22, 2000

Attached Document

General

1. We would like to confirm if the latest authorized version of “PC-1 Form” is the one dated on November 3, 1999. Please note that the following questions are made based on the said recognition.

Positioning of the proposed project in national development plan

1. Has there been any alteration in the national development plan, in particular the Ninth Five Year Plan (1998-2003), since the change of government in your country last year?
2. Has there been any alteration in the government’s development strategy regarding metal working and plastic industries or small and medium scale industry?
3. If there has been any alteration in the plan or the strategy above, how is this proposed project positioned in the new plan/strategy?

Present Status of Target Sector in Pakistan

1. How much value of plastic molds has been manufactured in your country over the last 5 years?
2. What kinds and levels of plastic molds can be/cannot be domestically manufactured in response to the market needs? (Please give some examples)

PITAC

1. Please provide us with the updated data on staff, organization, and budget of PITAC for the fiscal year 1999-2000.

Project

1. Is the local cost for this proposed project described in page 4 of “PC-1 Form” committed or available for the whole tentative project period?
2. Please inform us about the construction schedule of new building for the project and the latest layout plan for Hall No.1 and 2 of the building shown in the Annex X III of “PC-1 Form” with their respective major purposes.
3. Has there been any change in the member of prospective counterpart personnel for

the project, which is listed in Annex 8 of Attached Document of the Minutes of Discussions agreed at the previous Basic Study? If there has been any change, please send us a new member list.

4. Please inform us about the prospect of new staff recruitment mentioned in page 21 of "PC-1 Form".
5. Please state the order of priority for the proposed machinery and equipment listed in page 18 and 19 of "PC-1 Form".

Others

1. Please describe the role and activities of Pakistan Plastic Manufacturers Association and its relationship with PITAC.
2. Please describe the role and activities of Pakistan Association of Automotive Parts and Accessories Manufacturers and its relationship with PITAC.

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Questionnaire

For the Preliminary Study Team on the Proposed Project on Balancing and Modernization of Workshop Facilities at PITAC, Lahore.

a. General

Yes, it is confirmed that the latest authorized version of "PC-1 Form" is the one approved by the CDWP on 27th November, 1999 (copy enclosed).

b. Positioning of the proposed project in national development plan

1. There is no alteration in the national development plan, in particular, the Ninth Five-Year Plan (1998-2003), since the change of government in Pakistan last year.
2. There is also no alteration in the government's development strategy regarding metal working and plastic industries or Small and Medium Enterprises (SMEs), rather more emphasis has been given on these sectors by the present Government.

c. Present Status of Target Sector in Pakistan

1. Following is the detailed value (million rupees) of plastic mould imported during the last five year:

1993-94	1994-95	1995-96	1996-97	1997-98	1998-99
131.787	152.461	161.881	130.453	142.799	39.617
					(JUL-SEP)

Source:

"Foreign Trade Statistics of Pakistan" Federal Bureau of Statistics, Economic Affairs & Statistics Division Government of Pakistan.

2. Kinds and levels of the plastic moulds that cannot be domestically manufactured in response to the market needs are detailed in Annexure 9 of Minutes of Discussion between the Japanese basic study team and authority concerned of the Government of Islamic Republic of Pakistan, on 12th April, 1999 (copy enclosed).

d. PITAC

1. Updated data on staff and budget of PITAC for fiscal year 1999-2000 is given at Annexure-I & II.

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e. Project

1. Yes, the local cost for this proposed project described on page 4 of "PC-1 Form is planned and committed phase wise under PSDP, for the whole tentative project period as follows:

	Ist Year	2nd Year	3rd Year	Total Amount
Local Cost in Pak Rupees (Million)	4.00	2.20	2.15	8.350

2. After the disposal of the old/obsolete Machines & Equipment in our existing Machine & Tool Shop, enough space adjacent to be JICA Phase-I location is available with almost the same covered area as shown in the Annexure XIII of the PC-1 document. Additional construction will be carried out keeping in view the space requirement of the Project at site selection work and planning stage.
3. There is no change in the number of prospective counterpart personnel for the project, which is listed in Annex 8 of Attached Document of the Minutes of Discussions agreed at the previous Basic Study.
4. Yes, the approval for new staff recruitment mentioned in page 4 of "PC-1 Form has been taken up with the concerned authority, which is expected to be accorded in due course of time, before commencement of implementation stage.
5. The order of priority for the proposed Machinery and Equipment listed Annexure-I of the PC-1 document is tentative, which may be discussed and finalized during the visit of the Preliminary Study Team.

f. Others

1. The role and activities of Pakistan Plastic Manufacturers Association and its relationship with PITAC is as follows:

Pakistan Plastic Manufacturers Association (PPMA) was established in 1985 with the objective to provide productive cooperation between Plastic Parts Manufacturers. The Association has over four hundred members and provides jobs to over 500,000 people.

Aims and Objectives of PPMA

- To provide a strong linkage and cooperation amongst the members.
- To help the members in importing plastic raw materials and exporting finished products.
- Provides an environment of benchmarking among the members.
- To arrange Seminars, Symposia and Workshops for upgradation of knowledge and skills of the members.
- To motivate the members in Process Improvement and Good Management Practices.

- To provide equal opportunities to all the members to participate in National and International Exhibitions.
- To encourage members for upgradation of Technology and Excellence in Production.

Relationship of PPMA with PITAC

The members of PPMA are representatives in Governing Body & Executive Committee of PITAC, through Federations and Chambers of Commerce & Industry of all Provinces. PPMA is one of the beneficiaries of PITAC in Technological Backup Support, Training, Advisory and Consultancy.

2. **The role and activities of Pakistan Association of Automotive Parts and Accessories Manufacturers and its relationship with PITAC is as follows:**

Pakistan Association of Automotive Parts & Accessories Manufacturers (PAAPAM) was formed in 1988 to represent and to provide technical and management cooperation to its members. The Association have more than two hundred members at present and are increasing constantly. It is estimated that the total number of auto parts manufacturers has exceeded one thousand and providing jobs directly or indirectly to over 200,000 people.

Aims and Objectives of PAAPAM

- PAAPAM's philosophy is that Pakistan cannot achieve true progress without the development of engineering industries. To engineering industries for production of indigenized parts will directly contribute to self-reliance, progress and prosperity of the country.
- To help its members in acquisition of technology, excellence in quality and cost.
- To create an environment of learning between the vendors of automotive parts.
- PAAPAM believes that the contribution to the GDP and the valuable import substitution which brings about reduction in trade deficit which should be the most important goal of the country and members of PAAPAM should focus on these indicators.
- PAAPAM creates strong linkages among all active players of economic activity i.e. the Government, the Assemblers and the Parts Manufacturers.
- It helps its members in development of Human Resources and in promoting good management practices.

Relationship of PAAPAM with PITAC

The members of PAAPAM are representatives in Governing Body & Executive Committee of PITAC, through Federations and Chambers of Commerce & Industry of all Provinces. PAAPAM is one of the beneficiaries of PITAC in Technological Backup Support, Training, Advisory and Consultancy.

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Annexure-I

Pakistan Industrial Technical Assistance Centre (PITAC)

PITAC Staff Position

as on March 2, 2000

Sr.No.	Designation	No. of Posts
1.	Total Technical Officers (BPS 16 to 20)	34
2.	Total Technical Staff (BPS 01 to 15)	159
	Sub Total:	193
3.	Total Non-Technical Officers (BPS 16 to 19)	14
4.	Total Non-Technical Staff (BPS 01 to 15)	68
	Sub Total:	82
	Grand Total:	275

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Annexure-II

Pakistan Industrial Technical Assistance Centre Lahore.

Budget Allocation of PITAC for the Fiscal year 1999-2000.

1	Pay & Allowances of Employees	855,000/-
2	Repairs & Maintenance of Durable of Durable Goods & Works	445,000/-
3	Commodities & Service	452,000/-
4	Communication	295,000/-
5	Utilities	3,105,000/-
6	Rent Royalties	330,000/-
7	Other Expenditures in Commodities & Services	205,000/-
8	Transfer Payments, Communitied Value of pension, Gratuity, & Hospitalization of Retired Employees	5,640,000/-
9	Loans & Repayment (Loans to Employees	200,000/-
10	Misc. Expenditure (APO Contribution, Conference, Seminars, Workshop & Symposia	6,475,000/-
	Total Budget Grand	43,000,000/-

**QUESTIONNAIRE AND REQUEST FOR ARRANGEMENT
FOR THE PRELIMINARY STUDY TEAM
ON THE PROPOSED PROJECT
ON BALANCING AND MODERNIZATION OF
WORKSHOP FACILITIES AT PITAC, LAHORE**

1. Additional Questionnaire

Thank you for your prompt reply to our questionnaire the other day. Further to the last questionnaire, we would like to ask you some additional questions as Annex-1. We would appreciate it if you could answer the questions in writing and send the answer back to JICA Pakistan Office by March 27, 2000.

2. Request for Arrangement

Please be advised that the tentative schedule of Preliminary Study Team is planned as Annex-2. In connection with the schedule, we would like to ask you to make the following arrangements:

- (1) make appointments of our visit to the companies and associations at Lahore and Karachi listed in Annex-3. Please note that the purpose of the visit is to investigate the needs and technical level of industries. If there is any company or organization that you would recommend for us to visit other than those on the list, please include them as the candidate of our visit.
- (2) pick up our Study Team technical members (2 persons) and an interpreter (arranged by JICA) on April 3, and accompany them to visit the companies and associations in Lahore and Karachi in order to jointly investigate the needs and technical level of industries. We would like you to bear the travel and hotel expenses of PITAC staff for the visit to those companies.
- (3) inform the prospective counterpart personnel for the proposed project that we are planning to conduct technical examination and interview during our stay for the purpose of learning their technical level and setting an appropriate target level of the project.

Thank you for your kind cooperation in advance.

March 14, 2000

Statistics, Directory

In order to analyze the present conditions surrounding the proposed project and to learn about the prospect beneficiaries and source of cooperation for the project, we would like to have the following information:

1. amount of plastic molds manufactured in your country over the last 5 years (If you are not sure about this item, please advise us of any organization which would have the information.)
2. directory of the member companies of Pakistan Plastic Manufacturers Association in Karachi
3. list of all 4,500 plastic manufacturers in Pakistan, if possible
4. detailed information about foreign/local companies in the fields of electrical appliances, telecommunications appliances, household appliances, and office appliances (for example, number of companies in each field and items/amounts manufactured by foreign and local companies). (Refer to the following example.)

(Example)

(1) Foreign Company

(1) Number of Companies:

- electrical appliances: 100
- telecommunications appliances: 30
- household appliances: 150
- office appliances: 50

(2) Directory of Main Foreign Companies

Name of Company	Production Item	Yearly Production Amount
ABC Co. Ltd.	TV	Rs. 5,000,000
	Video player	Rs. 3,000,000
	Radio	Rs. 2,500,000
BBB Co. Ltd.	Telephone case	Rs. 5,000,000
	Computer keyboard	Rs. 3,000,000
	Calculator	Rs. 2,500,000

b. Local Company (example): in the same manner as the above

5. list of plastic products the demand for which would increase in Pakistan in near future. Please also describe your prospect for upcoming boom of a certain product in the next decade (for example: cellular phone, notebook computer, etc.).

Regarding PITAC

1. Please give us updated information about the income and expenditure of PITAC, summary of PITAC's performance, and training courses implemented by PITAC from 1994 to 2000 using the same formats as Annex 5 and 6 of Minutes of Discussions of Basic Study Team.
2. Please show us the number of companies by scale which benefit from the following PITAC's services from 1994 to 1999 in each category of small-scale, medium-scale, and large-scale by using the form below:

1999	Small	Medium	Large
a. Training Course (1) Technical Training (2) HRD Training			
b. Advisory and Consultancy Services			
c. Manufacturing Services			

Please also specify the definitions of industries in each scale.

3. Could you inform us of the price of each training courses, advisory and consultancy services, and manufacturing services respectively?

Regarding Project

1. What kind of techniques does PITAC hope to improve in the each technical field of mold design, processing, assembling and try-out? Please explain in detail, for instance, as follows:
(Design)
 - 3-dimension mold designing
 - mold design technique (not depending on copying of a model product), etc.(Processing)
 - rapid processing technique of mold parts
 - machining tool management
 - production process management
 - maintenance/repair technique for CNC machine or CAD/CAM equipment, etc.
2. What kind of training courses or technical consultation services does PITAC plan to carry out for the industries during and after the proposed project by applying the techniques to be transferred by Japanese experts? Please inform us of the specific names of training courses or contents of consultation services which you are

tentatively planning at present.

3. Please give us the reason for the change in project local cost between PC-1 form and the answer to our last questionnaire. Please also show us the breakdown of the local cost described in the item e.1. of the answer to our questionnaire (total Rs. 8.350 million).
4. Further to the item e.2. of the answer to our questionnaire, we would like to know the size of space prepared for the proposed Phase 2 project and detailed layout plan for the equipment that you have now and wish to have through the project. We would request you to inform us the information above with drawing of the floor layout in the building. Please also advise us of the size of space which is properly air-conditioned for equipment.

Machinery and Equipment

1. Since we agreed that the field of technical cooperation in the project would be plastic mold making at the time of Basic Study Team, the equipment for heat treatment (Item No. 15, 16 and 17 of Annex- I of PC-1 form) appears to be out of scope. Could you inform us of the reason why you included the equipment in the list?
2. With regard to e.2. of the answer to our questionnaire, please inform us which equipment you have disposed so far.
3. We would like to learn the route of procurement and the place of origin of equipment that you have at present, and the way to have the equipment repaired. Please inform us of the information above, including the name of manufacturers or import agencies, by using the list of Annexure 12, 13, 14, 15 and 16 of the answer to our questionnaire which had been sent prior to the Basic Study Team of last year. Please also let us know the route of procurement of necessary parts for the equipment and consumables needed for production activities.
4. It is essential that the stable supply of electricity and purified water would be assured for the maintenance of such sophisticated machinery as precision machining equipment and injection molding machines. Could you please inform us how to secure the stability of electricity and water supply for the proposed project and how much stable would their supply be maintained in quality and quantity?

Questionnaire II

For the Preliminary Study Team on the Proposed Project on
Balancing and Modernization of Workshop Facilities at PITAC,
Lahore.

Statistics/Directory

In order to analyze the present condition surrounding the proposed project and to learn about the prospect beneficiaries and source of cooperation for the project, we would like to have the following information:

1. *Amount of plastic molds manufactured in your country over the last 5 years (If you are not sure about this item, please advise of any organization which would have the information)*

The information is being gathered and may be submitted at the time of visit of the Team.

2. *Directory of the member companies of Pakistan Plastic Manufacturers Association in Karachi.*

Please see Annexure I & II

3. *List of all 4,500 plastic manufacturers in Pakistan, if possible.*

Very difficult to collect this information at the moment.

4. *Detailed information about foreign/local companies in the fields of electrical appliances, telecommunications appliances, household appliances, and office appliance (for example, number of companies in each field and items/amounts manufactured by foreign and local Companies).*

The information will be gathered during plant visits of the Team.

5. *List of plastic products the demand for which would increase in Pakistan in near future. Please also describe your prospect for upcoming boom of a certain product in the next decade.*

Gathering of information is in progress and may be submitted at the time of visit of the Team.

Regarding PITAC

1. a. *Income and expenditure of PITAC.*

Please see Annexure III

- b. *Summary of PITAC's performance and training courses implemented by PITAC from 1994 to 2000 using the same formats as Annex 5 and 6 of Minutes of Discussions of Basic Study Team.*

Information will be submitted during the visit of the Team.

2. Please show us the number of companies by sales which benefit from the following PITAC's services from 1994-1999 in each category of small-scale, medium-scale, and large-scale by using the form below:

During the period 1994-99, 6,900 total assignments regarding Training, Manufacturing and Advisory/Consultancy Services were received by PITAC from all Large, Medium and Small Enterprises. Breakup of each category as desired is as follows:

1994-99	Small	Medium	Large
a. Training Course	1877	422	47
(1) Technical Training	1502	328	41
(2) HRD Training	375	94	6
b. Advisory and Consultancy Services	221	50	5
c. Manufacturing Services	3422	770	86

Please also specify the definitions of industries in each Scale.

Classification of Small, Medium and Large Industry on the basis of No. of Employees

Small Industries upto 50 Employees

Medium Industries upto 400 Employees

Large Industries more than 400 Employees

3. Could you inform us of the price of each training courses, advisory and consultancy services, and manufacturing services respectively?

Fees of the training courses, advisory and consultancy services, and manufacturing services respectively are as follows:

a. Fees of Training Courses

For common people and private organizations

10 Weeks Training Programme Rs. 5,000/-

6 Weeks Training Programme Rs. 3,000/-

For public sector organizations

10 Weeks Training Programme Rs. 7,500/-

6 Weeks Training Programme Rs. 4,500/-

NC Machining Courses Rs. 2,000/week

Special Courses Rs. 1,000/week

b. Fees of Advisory and Consultancy Services

For Diagnostic Survey Rs. 1,000/man/day

For Machine Installation, Process Improvement and Improved Quality and Productivity Rs. 750/man/day

(To and Fro Transportation, Boarding/Lodging for Consultants/Advisors to be borne by Client/ Company)

c. Fees of Technological Backup Support Services		
For Designing work		Rs. 50/hour
For Machining Operations		Rs. 20/hour
For precision Machining Operations		Rs. 50/hour
For EDM Spark Erosion		Rs. 80/hour
For EDM Wire Cutting		Rs. 7/mm, upto 1½" T
		Rs. 10/mm, upto 2½" T
		Rs. 20/mm, upto 3½" T
For CNC Lathe Operations		Rs. 350/hour

Regarding Project

1. *What kind of techniques does PITAC hope to improve in the each technical field of mold design, processing assembling and try-out? Please explain in detail, for instances, as follows:*

Mould Designing

- Product Designing and Development
- Mould Standards
- 3-Dimensional Mould Designing
- Mould Designing Techniques
- Trained Engineers and Designers

Mould Processing

Following areas are required to be looked into for processing of the Mould:

- Rapid Processing Techniques for Mould parts
- Production Process Management
- Machine Tools Management
- Productive/Preventive Maintenance/Repair Technique of CNC Machines or CAD/CAM equipment, etc.
- Rapid Prototype Testing of the Mould
- Trained Engineers, Managers, Supervisors and Technicians

Mould Try-out

- Moulding Machines for Try-out of various sizes of the Moulds
- Trained Engineers, Managers, Supervisors and Technicians

2. *What kind of training courses or technical consultation services does PITAC plan to carry out for the industries during and after the proposed project by applying the techniques to be transferred by Japanese experts? Please inform us of the specific names of training courses or content of consultation services which you are tentatively planning at present.*

The following Training Programmes and Consultancy/Advisory Assignments are planned to carry out after successful implementation of the Projects

a. Training and Educational Programmes

- Post Degree Training Course in Mould Making(6 Months)
- Post Diploma Training Course in Mould making (One year)

- iii. Computer Aided Mould Designing for Engineers & Supervisors (12 Weeks)
- iv. Computer Aided Mould Processing for Engineers & Supervisors (12 Weeks)
- v. Introduction to Plastic Moulding (2 Weeks)
- vi. Plastic Moulding for Engineering Products (6 Weeks)
- vii. Quality Control for the Engineering Plastic Products (6 Weeks)
- viii. Operation and Maintenance of Plastic Moulding Machines (6 Weeks)
- ix. Plastic Moulding and Mould Making for Technicians (12 Weeks)
- x. Inspection and Quality Control of Plastic Products (6 Weeks)

b. Proposed Consultancy/Advisory Assignment

- i. Consultancy/Advisory in Operation and Maintenance of Mould Processing and Moulding Machines.
- ii. Consultancy/Advisory in Mould Designing and Mould Processing.
- iii. Consultancy/Advisory in Quality Problems of Plastic Products.
- iv. Consultancy/Advisory in Moulds Repair and Maintenance.

3. *Please give us the reason for the change in project local cost between PC-I form and the answer to our last questionnaire. Please also show us the breakdown of the local cost described in the item e.1 of the answers to our questionnaire (Total Rs. 8.350 million.)*

The change in the local cost has occurred because of utilization of already existing building, vacated by disposal of out dated and un repairable Machines, i.e. Die Sinking Profile Milling Machine and Gear Grinding Machine, both of Russian Origin. EDM Spark Erosion Machine is also in the processing of disposal. The breakdown of local cost i.e. Rs. 8.350 million is given in PC-I document revised on 27th November, 1999.

4. *Further to the item e.2 of the answer to our questionnaire, we would like to know the size of space prepared for the proposed Phase 2 project and detailed layout plan for the equipment that you have now and wish to have through the project. We would request you to inform us the information above with drawing of the floor layout in the building. Please also advise us of the size for space which is properly air-conditioned for equipment.*

Please See Annexure IV & V

Machinery and Equipment

1. *Since we agreed that the field of technical cooperation in the project would be plastic mold making at the time of Basic Study Team, the equipment for heat treatment (Item No. 15, 16 and 17 of Annex-I of PC-I form) appears to be out of scope. Could you inform us of the reason why you included the equipment in the list?*

In JICA Phase-I Project, the Induction Hardening Machine was donated to PITAC which proved to be highly productive for Automotive Parts Manufacturers, Supporting Industries and Vendors. After passing appreciable time the Machine has started giving frequent troubles in its Operation and Maintenance. Our Manager, Heat treatment Shop was of the view that his Shop must be equipped with latest Machines and Equipment to maintain and improve its efficiency in providing Technological Backup Support to the industry.

We do realize that the matter about the Machines and Equipment for Heat treatment Shop (Item No.15,16 and 17 of Annex-I of PC-1 form) was discussed at length during the visit of basic study team. The reason for inclusion of the referred items is explained in above paragraph, however, if they don't fall in the scope of the project they can be deleted/dropped.

2. *With regard to e.2 of the answer to our questionnaire, please inform us which equipment you have disposed so far.*

Die Sinking Profile Milling Machine and Gear Grinding Machine, both of Russian Origin have been disposed off. EDM Spark Erosion Machine is also in the processing of disposal.

3. *We would like to learn the route of procurement and the place of origin of equipment that you have at present, and the way to have the equipment repaired. Please inform us of the information above, including the name of manufacturers or import agencies, by using the list of Annexure 12,13,14,15 and 16 of the answer to our questionnaire which had been sent prior to the Basic Study Team of last year. Please also let us know the route of procurement of necessary parts for the equipment and consumable needed for production activities.*

The information is being collected and may be presented during the visit of the Team.

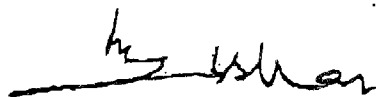
4. *It is essential that the stable supply of electricity and purified water would be assured for the maintenance of such sophisticated machinery as precision machining equipment and injection molding machines. Could you please inform us, how to secure the stability of electricity and water supply for the proposed project and how much stable would their supply be maintained in quality and quantity?*

Generator / Stabilizer and Water Treatment Plant would be installed to meet the above mentioned requirement.

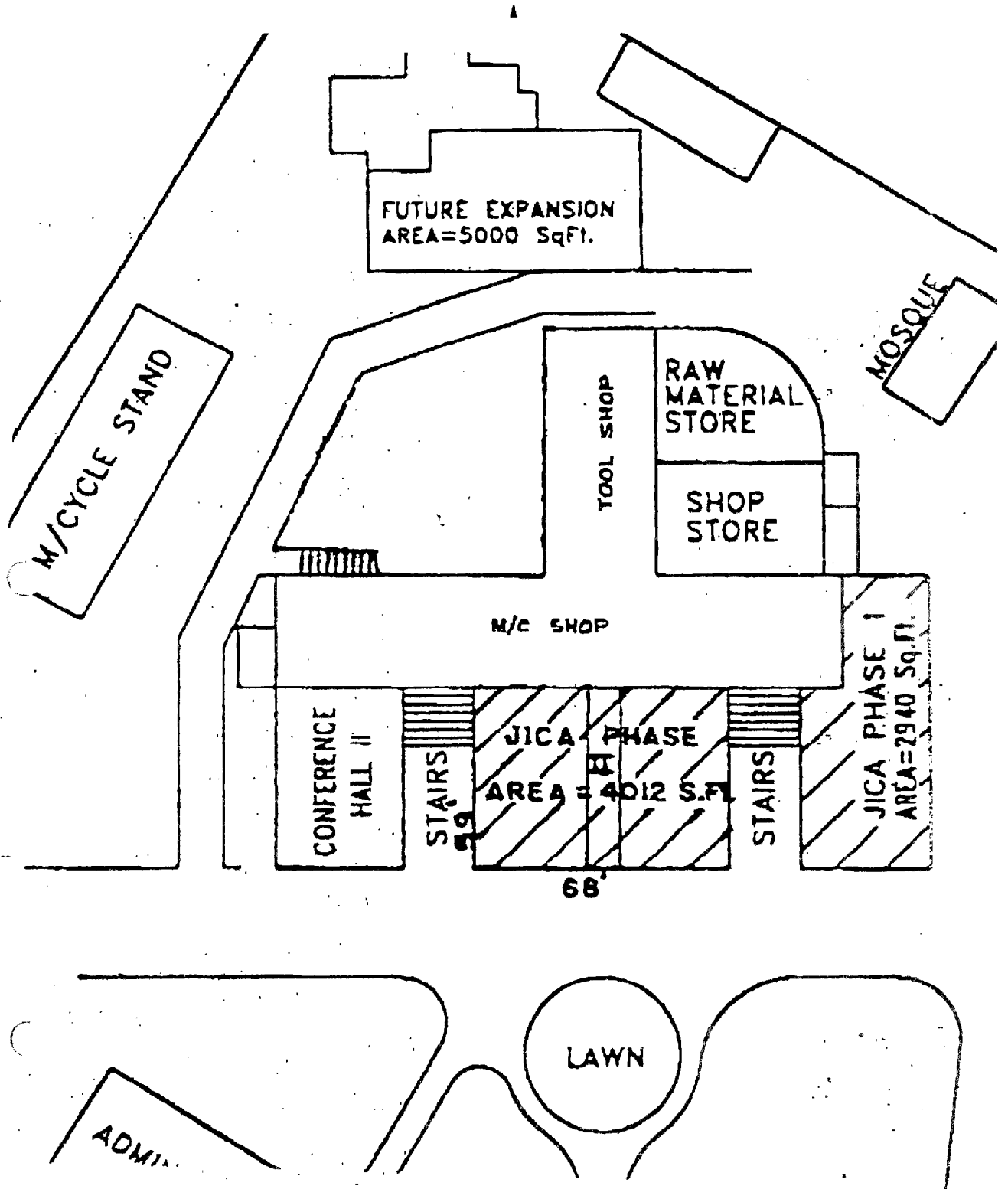
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The Annexure/in this regards will be send through courier service.



(M.A. JABBAR KHAN)
GENERAL MANAGER PITAC/HEAD OF NPO
SECRETARY/MEMBER NPC



Budget, Settlement Account, Generated Income of PITAC, 1998-99

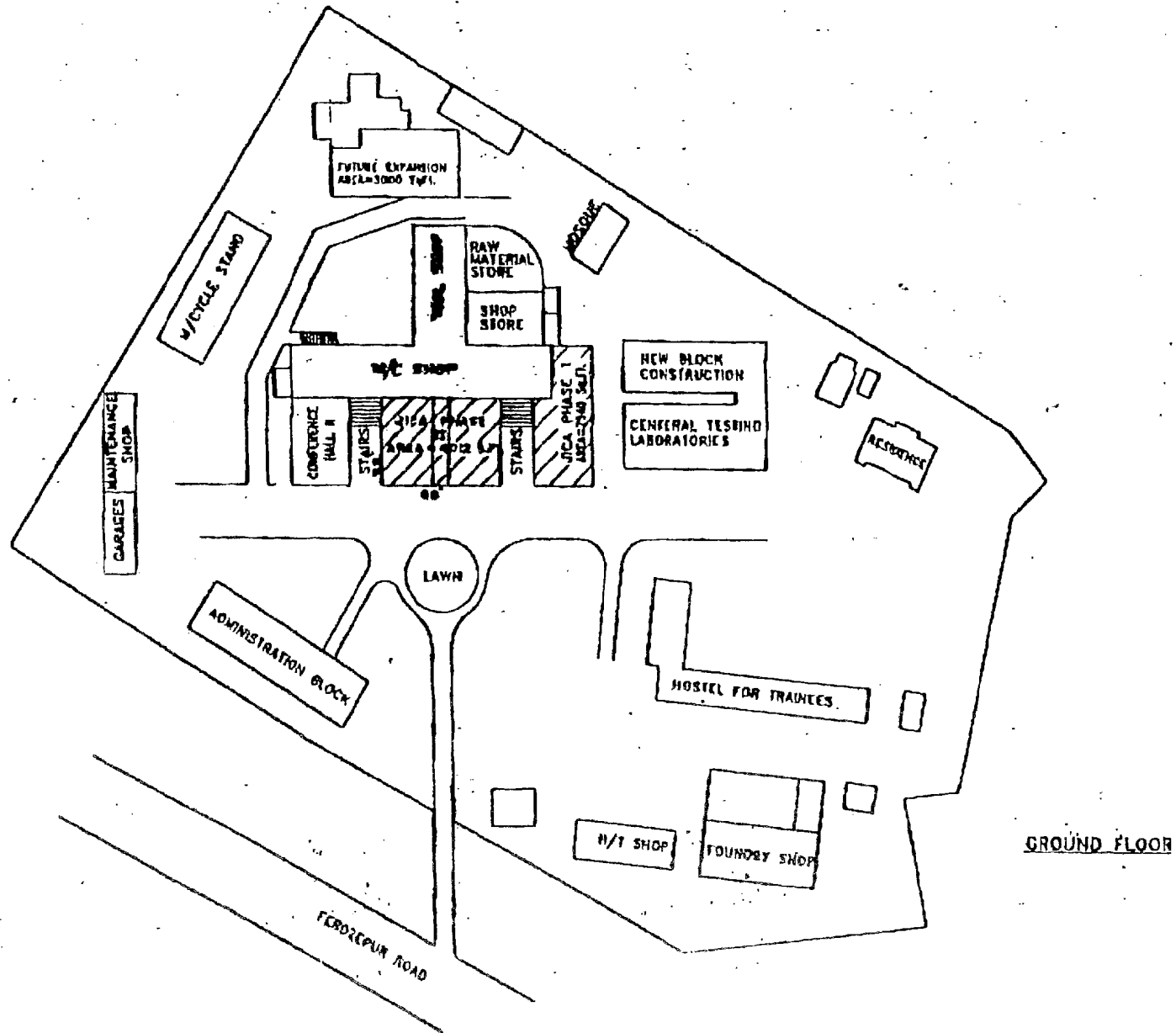
Expenditure	Estimated (A)	Actual (B)	(B)/(A)	Income	Estimated (A)	Actual (B)	(B)/(A)
Personnel Expense	26,751,270/-	26,749,813/-	100%	Training	1,200,000/-	1,073,939/-	89.49%
Utilities	3,031,000/-	3,031,047/-	100%	Advisory and Consultancy Service	100,000/-	78,421/-	78.42%
Office Consumable	880,500/-	881,031/-	100%	Seminars and Conference	150,000/-	140,094/-	93.40%
Furniture & Office	--	--	--	Production (Die Moulds & Services)	3,100,000/-	2,721,316/-	87.78%
Maintenance	421,800/-	422,142/-	100%	Others	50,000	50,000/-	100%
				Total Receipt	4,600,000/-	4,063,770/-	88.34%
Others (APO Contribution Conference, Seminar & Symposia)	5,371,000/-	5,371,537/-	100%	Govt. grant-in Aid	32,391,800/-	32,391,800/-	100.00%
Total	36,455,570/-	36,455,570/-	100%	Total	36,991,800/-	36,455,570/-	98.55%
Income/Expenditure (Actual)							100%

Budget, Settlement Account, Generated Income of PITAC, 1999-2000 (July 1999 - January 2000)

Expenditure	Estimated (A)	Actual (B)	(B)/(A)	Income	Estimated (A)	Actual (B)	(B)/(A)
Personnel Expense	31,860,400/-	17,425,322/-	54.69%	Training	1,000,000/-	124,850/-	12.48%
Utilities	3,105,000/-	1,782,510/-	57.50%	Advisory and Consultancy Service	100,000/-	41,227/-	41.22%
Office Consumable	911,600/-	545,899/-	59.88%	Seminars and Conference	300,000/-	139,000/-	46.33%
Furniture & Office	--	--	--	Production (Die Moulds & Services)	3,550,000/-	1,485,720/-	41.85%
Maintenance	445,000/-	284,564/-	63.95%	Others	50,000/-	16,280/-	32.56%
				Total Receipt	5,000,000/-	1,807,077/-	36.14%
Others (APO Contribution Conference, Seminar & Symposia)	6,678,000/-	155,135/-	2.32%	Govt. grant-in Aid	38,000,000/-	20,890,000/-	54.97%
Total	43,000,000/-	20,193,430/-	46.96%	Total	43,000,000/-	22,697,077/-	88.97%
Income/Expenditure (Actual)							100%

PAKISTAN INDUSTRIAL TECHNICAL ASSISTANCE CENTER LAHORE
 HEAD OFFICE AND WORKSHOPS
 (PROPOSED LOCATION OF THE SITE FOR JICA PROJECT PHASE-1D)

Appendix IV



Questionnaire to the Ministry of Industries and Production

We, JICA, have received a project proposal for upgrading the techniques of manufacturing precision plastic molds from Pakistan Industrial Technical Assistant Center (PITAC), Lahore. In response to the proposal, we are planning to dispatch Preliminary Study Team in early April, 2000 in order to examine the feasibility of the proposed project in consideration of the present circumstances and future prospect in the field of metal-working industry and plastic industry in Pakistan.

In connection with the mission of the study team, we would like to obtain data and information related to the said fields of industry. We would appreciate it if you could cooperate with us by giving answers to the following items at the time of our visit to your office on April 3, 2000.

General Questions

Please provide us the following statistical data by referring to the source of information:

- (1) Total production value of manufacturing sector over the last 5 years
- (2) Total number of companies and employees in manufacturing sector
- (3) Number of companies in manufacturing sector classified as small-scale, middle-scale, and large-scale, respectively

Questions regarding Plastic Industry in Pakistan

Please provide us the following statistical data by referring to the source of information:

- (1) Value of plastic products manufactured domestically in Pakistan over the last 5 years
- (2) Value of plastic products imported over the last 5 years
- (3) Value of plastic products exported over the last 5 years
- (4) Value of plastic molds manufactured domestically in Pakistan over the last 5 years

Questions regarding Ministry of Industries and Production and Relevant Organizations

- (1) Please describe the latest organizational structure of Ministry of Industries and

Production with an organization chart. Please also inform us about the functions of each department/division.

- (2) Please inform us about the organizational structure, functions, and activities of “Engineering Development Board”, a governmental body established for formulating a long-term vision for the development of engineering sector.
- (3) Please provide us the latest report or policy papers presented by “ Engineering Development Board” regarding manufacturing sector development in Pakistan, if available to us.
- (4) We would be grateful if a member of “Engineering Development Board” could accompany at the time of our visit on April 3.

INFORMATION REQUIRED BY JICA

Total production value of manufacturing sector over the last 5 years.

(Rs million)

	<u>1994-95</u>	<u>1995-96</u>	<u>1996-97</u>	<u>1997-98</u>	<u>1998-99</u>
Small Scale	88,107	104,902	126,842	144,788	160,553
Large Scale	200,799	226,482	255,798	284,725	304,373
Total	288,906	331,384	382,640	429,513	464,925

Source: Statistical
Bulletin of SBP

Total number of companies and employees in manufacturing sector

Total Companies in Manufacturing Sector

<u>Industry</u>	<u>No. of units</u>
Cement	24
Paper	391
Textile	19,365
Metal & Metal Products	7,643
Electronic Appliances	35
Engineering	225
Food, Beverages & Tobacco	6,993
Ghee/Oil Industry	160
Leather & Leather Product	564
Pharmaceutical & Chemicals	1,230
Plastic & Rubber	486
Printing	330
Marble & Glass	308
Wood & Wood Products	1,457
Furniture	108
Others	6,110
<u>Total</u>	<u>45,429</u>

Source: SMEEDA

Total Employees in Manufacturing Sector (million)

<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>
<u>2.74</u>	<u>2.8</u>	<u>3.17</u>	<u>3.26</u>	<u>3.33</u>

Source: Federal Bureau of Statistics

Value of Plastic products manufactured domestically in Pakistan over the last 5 years.

<u>Plastic Products</u>	<u>Value in ('000' Rs)</u>
1986-87	1301901
1987-88	1340589
1988-89	1462259
1990-91	1985087
1995-96	3916874

Source: Federal Bureau of Statistic

Value of plastic products exported over the last 5 years

<u>Years</u>	<u>Value in Rs. Million</u>
1994-95	333.154
1996-96	447.832
1996-97	512.879
1998-99	833.955

Source: Federal Bureau of Statistics

Contd..P/3-

: -3: -

Value of plastic moulds manufactured domestically
in Pakistan over the last 5 years.

Information could not be obtained.

Value of plastic moulds imported during
last 5 years

<u>Years</u>	<u>Value in Rs Million</u>
1993-94	131.787
1994-95	152.461
1995-96	161.881
1996-97	130.453
1997-98	142.799
1998-99 (July-Sept)	39.617

Organisational structure of Ministry of Industries
and Production.

Organisational structure is placed below
in the folder.

Information about (Engineering Development Board)

A representative from Engineering Development Board have been requested to attend the meeting. He will provide information concerning Engineering Development Board.

Questionnaire to Board of Investment

We, JICA, have received a project proposal for upgrading the techniques of manufacturing plastic molds from Pakistan Industrial Technical Assistant Center (PITAC), Lahore. In response to the proposal, we are planning to dispatch Preliminary Study Team in early April, 2000 in order to examine the feasibility of the proposed project in consideration of the present circumstances and future prospect in the field of metal-working industry and plastic industry in Pakistan.

In connection with the mission of the study team, we would like to obtain data and information related to the said fields of industry. We would appreciate it if you could cooperate with us by giving answers to the following questions at the time of our visit to your office on April 4, 2000.

1. Which sector is prioritized in inviting foreign capital investment? Are the metalworking and plastic industries included in the prioritized sector?
2. What kinds of incentives are prepared to attract foreign capital investment?
3. What kinds of regulations are imposed on foreign capital investment?
4. Please inform us about the regulation for local contents rate of products. How much percentage of parts and materials for automobiles and electric appliances must be procured domestically at present? What is the principle applied for setting or changing the target rate?
5. Please inform us about the demarcation of functions between BOI Islamabad Office and Karachi Office.

Questionnaire to Small and Medium Enterprise Development Authority

We, JICA, have received a project proposal for upgrading the techniques of manufacturing precision plastic molds from Pakistan Industrial Technical Assistant Center (PITAC), Lahore. In response to the proposal, we are planning to dispatch Preliminary Study Team in early April, 2000 in order to examine the feasibility of the proposed project in consideration of the present circumstances and future prospect in the field of metal-working industry and plastic industry in Pakistan. Among companies in the said fields of industry, small and medium enterprises are to be particularly focused on in the proposed project.

In connection with the mission of the study team, we would like to obtain data and information related to the said fields of industry and small and medium enterprises. We would appreciate it if you could cooperate with us by giving answers to the following questions at the time of our visit to your office on April 4, 2000.

General Questions

1. What are the definitions of the categories of “small”, “medium”, and “large” enterprises, respectively?
2. How many small and medium enterprises (SMEs) do exist in each manufacturing sector?

Questions concerning SME Development Policy and Measures

1. What kind of affirmative measures have been taken to develop SMEs, such as legal protection, credit systems, incentives in taxation, technical assistance, and so forth?
2. If your country has financial support system for SMEs, please inform us of its purposes, target groups, eligibility criteria, subsidizing rates, annual total amount of the subsidy, and the number of enterprises receiving subsidy.
3. If your country has tax incentive system, please inform us of its purposes and target groups. Please also let us know if there is tax exemption system to enhance modernization of machinery and equipment.

4. Is there a system to support capital investment or start-up of SMEs by providing low-interest loans or by assuring their debt?
5. Do you conduct any technical or management advisory services for supporting SMEs?
6. Do you take any supportive measures to enhance technology development in SMEs?
7. What is the function of PITAC in SME development policy?
8. Is there any target sub-sectors in SME development policy? Are plastic product manufacturers or plastic mold manufacturers included in the target sub-sectors?



4 April, 2000

JICA Team in Pakistan

Dear Sirs,

Re: Questionnaire To SMEDA

In reply to your request, we have furnished the answers on the SME questionnaire. The answers have been based on the available data from various sources and SMEDA's analysis and tabulation of facts.

We thank you for your keen interest in SME activity in Pakistan and your confidence in SMEDA

Yours sincerely,

Iqbal Mustafa
Chief Executive Officer

Small and Medium Enterprise Development Authority
GOVERNMENT OF PAKISTAN

43-T, Gulberg II, Lahore 54660, Pakistan. UAN: 111-111-456. Fax: 575 3545 & 575 3587

Section A Answering General questions

Q1. What are the definitions of the categories of “Small”, “Medium”, and “Large” enterprises, respectively?

Ans.1. State Bank of Pakistan defines a Small Enterprise which has a maximum of Rs 20 mn in plant and machinery excluding land & buildings and employs upto 35 persons.

2. Small Business Finance Corporation defines an SME which has a fixed capital investment between Rs 0.5mn to Rs 200mn.

3. In India, the Development Commissioner of Small Scale Industries in 1997 defined an SSI which had an investment in plant and machinery of Indian Rupees Rs 30 mn.

The definition of SME's is under consideration by SMEDA & SBFC. A final view of this will be taken alongside GOP by June 2000.

Following definition of SME's can be taken as a reference.

SME's Definition

<u>Category Topic</u>	Micro	Small	Medium	Large
Capital Employed (Rs in mn)	≤ 1	≤ 20	≤ 100	> 100
No of workers	≤ 10	≤ 35	≤ 100	>100
Type of Business	Sole Proprietorship	Proprietorship or Partnership	Partnership or Private Ltd.	Private Ltd or Public Ltd
Membership of Business Association or Chamber of Commerce	Not present	Probably member of association	Probably member of local Chamber of Commerce	Probably member of all Pakistan Chambers of Commerce

Section-A...Contd

Q 2. How many small and medium enterprises (SMEs) do exist in each manufacturing sector?

Ans 2. The summary of small & medium manufacturing units is given as follows:

- i) Punjab Province
- ii) North West Frontier Province
- iii) Sindh Province
- iv) Baluchistan Province

Attached sheets:

Manufacturing SMEs in Punjab	– (Medium = 3750, Small = 34510)	4 Pages (Source: EAC-2000)
Manufacturing SMEs in N.W.F.P	– (Medium = 533, Small = 1371)	2 Pages (Source: EAC-2000)
Manufacturing SMEs in Sindh	– (Medium = 1523, Small = 475)	1 Page (Source: EAC-2000)
Manufacturing SMEs in Baluchistan	– (Medium = 155, Small = 172)	1 Page (Source: EAC-2000)

See Annexure-A for details

Note: EAC stands for Expert Advisory Cell

Section-B

Q 1. What kind of affirmative measures have been taken to develop SMEs, such as legal protection, credit system, incentives in taxation, technical assistance, and so forth?

Ans1. No steps have been taken nationally, but some steps have been taken on a sectoral basis, by SMEDA.

Work at SMEDA is selected on the basis of priority sectors. A sector is considered a priority sector if it has any or all of these factors:

- i) Growth rate
- ii) Significant SME presence
- iii) Labour intensity
- iv) Sustainable competitive advantage
- v) High value added & export potential

- a) Legal protection: No work has been carried out as yet.
- b) Credit system: In sectors under study once a policy has been made, financial models prepared for survivability, then lending institutions are sold the benefits of lending to the SME's on commercial worth. Lending remains the prerogative of lenders on merit.
- c) Incentives on Taxation: No work has been done as yet. No relief in taxation is expected for the next two years because of the economic situation and until unless the levy of GST on retail & services occurs.
- d) Technical Assistance: Technical assistance where available can only be provided to sectors under study or sectors where study has been finished or from institutions already existing in this society.
- e) SME First Point of Assistance: On a walk in basis, on e-mail, telephone and fax, SMEDA intends to introduce first point of assistance at all its branches in the next financial year for small and medium enterprises owners and managers.
- f) Regulatory System: Where necessary SMEDA will implore the provincial and federal Govt. to change laws by legislation to put in place a regulatory system benefiting the SMEs.
- g) Long Term Outlook: Being planned at SMEDA looking towards future needs of SME's.

Created on 2-April, 2000

Section-B...Contd

Q 2. If your country has financial support system for SMEs, please inform us of its purposes, target groups, eligibility criteria, subsidizing rates, annual total amount of the subsidy, and the number of enterprises receiving subsidy.

Ans 2. Small industries can get loans in the Punjab, NWFP, Sindh and Baluchistan from the following institutions respectively:

- Punjab Small Industries Corporation (PSIC)
- Sarhad Small Industries Development Board (SSIDB)
- Sindh Small Industries Corporation (SSIC)
- Industries Department, Baluchistan Government

Small and Micro units can also get loans from:

- Small Business Finance Corporation (SBFC)
- Youth Investment Promotion Scheme (YIPS)
For unemployed youth, now defunct
- Bank of Khyber
- Allied Bank Ltd
- Prime Ministers Employment Scheme.
For unemployed youth, now defunct

Medium enterprises can get loans from:

- Pakistan Industrial Development Corporation (PIDC)
- Resource Development Finance Corporation (RDFC)
- Pakistan Industrial Credit Investment Corporation (PICIC)
- National Development Finance Corporation (NDFC)
- Public Sector Banks
- Bank of Punjab
- Other loan giving institutions

- | | |
|---|--|
| Purposes: | i) To help in industrialization of a particular backward geographical zone of a province. |
| | ii) To decrease the unemployment level. |
| | iii) To help in setting up of a type of unit not present before. |
| b) Target Groups: | i) New entrepreneurs. |
| | ii) Existing entrepreneurs for balancing and modernisation (BMR). |
| c) Eligibility Criteria: | Varies from province to province. From one financial institution to another. |
| d) Subsidizing rates: | i) Only as dictated by State Bank of Pakistan (SBP) from year to year as a matter of policy. |
| | ii) Basically they are on commercial rates prevailing at that time. |
| e) Annual total amount of subsidy: | Only SBP can answer for this part. |
| f) Number of enterprises receiving subsidy: | Only SBP can answer for this part. |

Note: SBP is State Bank of Pakistan

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Section-B...Contd

Q 3. If your country has tax incentive system please inform us of its purposes and target groups. Please also let us know if there is tax exemption system to enhance modernization of machinery and equipment?

Ans 3. Tax incentive is only given in the form of tax holidays for a few years after the establishment of an enterprise in an industrial estate or in an under-developed area. It is in the shape of non levy of Federal & Provincial taxes.

There is no distinction between tax holidays for large industry or small and medium enterprises. There is no concession in tax laws to enhance modernization of machinery & equipment.

Q 4. Is there a system to support capital investment or start up of SMEs by providing low – interest loans or by assuring their debt?

Ans 4. All SME start ups are required to invest equity of 40%. Thus debt to equity ratio is 60:40. Low interest loans are provided for specific purposes in the era of political Government, where the tab is picked up by the Government. Usually small enterprises are dependent on starting on their own, and after a few years of successful running they have sympathetic response from banks for working capital after pledging the SME's capital assets or SME owner's private property.

Interest rate of loans for example from SBFC is at 15% pa up to Rs. 2 mn where total assets of an SME other than land is Rs. 5 mn.

Export finance is done by SBP at 8% pa.

Local machinery manufacture (LMM) finance is done at 14% pa.

Export finance guarantee scheme is on the anvil between SBP, EPB and FPCCI, will provide export guarantee without collateral, this has been an outstanding demand of SMEs.

There is no SME debt assurance policy in place.

Q 5. Do you conduct any technical or management advisory services for supporting SMEs?

Ans 5. By the start of the next financial year on 1 July, 2000, SMEDA plans to cater for the eradication of difficulties of entrepreneurs from the SME sector by facilitating a walk in service for immediate help.

SMEDA's business counsellors trained on a sector by sector basis will be able to give basic management advisory service. For technical services they will forward the case to sector heads in that specific sector or to head of technical support services or to resource person/sector champions outside the SMEDA environment. SMEDA organogram and SMEDA support functions exhibit is attached for reference as a part of this answer.

Section-B...Cont

Q 6. Do you take any supportive measures to enhance technology development in SMEs?

Ans 6. Yes supportive steps are taken to enhance the technological level of the SMEs and make them competitive. At present SMEDA is preparing the policy of upgrading the technology level on sectoral basis i.e. technology upgradation is part of the sectoral strategy. Some of the technology upgradation projects undertaken are listed below:

- | | |
|---|---|
| <p>Transport</p> <ul style="list-style-type: none"> i) Euro 2 exhaust emission standard for bus ii) 900mm bus floor height iii) Pneumatic suspension iv) Power operated service doors v) Public address system on buses vi) Air conditioning in buses vii) Preferably 100 passenger buses | <p>Fisheries</p> <ul style="list-style-type: none"> i) GPS on boats ii) Fish finder on boats iii) UHF radio on boats iv) On board refrigeration system v) Use of plastic crates vi) Unloading cranes on boat & harbour side vii) Flake ice viii) FRP hold with PU insulation |
| <p>Dairy</p> <ul style="list-style-type: none"> i) Mini pasteurisation units ii) Farm milking equipment iii) Artificial insemination | <p>Cool Chain for Fruits & Vegetables</p> <ul style="list-style-type: none"> i) Refrigeration of value chain ii) Processing technology iii) Packaging technology |

As study is carried out on fresh sectors more technology related issues will be identified and measures will be taken to address those issues. This will lead to an enhancement in the overall upgradation of technological knowledge in this society.

Following shows future thrust of SMEDA:

Future Thrust	
Sectoral Focus	
1) Fisheries	2) Transport
3) Agriculture (Dairy & Horticulture)	4) Marble & Gems
5) Textile (Garments, made ups, weaving)	6) Light Engg.
7) Leather	8) Plastics
Sectoral/SME Support Services	
1) Management Support Services	2) Marketing Support Services
3) Technical Support Services	4) Financial Support Services
5) Policy Wing	

Section-B...Contd

Q 7. What is the function of PITAC in SME development policy?

Ans 7. PITAC was established by USA Aid programme in 1964, its function at that time was presumed to be:

- a) Enhancing technical skills of workers employed with private entrepreneurs.
- b) Providing basic engineering practices training to fresh graduated engineers.
- c) Providing high accuracy tool, die and gauge jobbing for private industry, for which expensive machines could not be bought at that time by the private sector.
- d) Providing at cost services related to heat treatment, forging, casting, electroplating, designing etc not common at that time in the private industry.

PITAC at that time was geared for all kinds of private industry and not specifically for SME sector. PITAC was a facilitator for technical SME's but it does not have SME specific agenda.

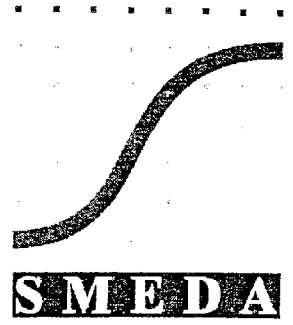
Q 8. Is there any target sub-sectors in SME development policy? Are plastic product manufacturers or plastic mold manufacturers included in the target sub-sector?

Ans 8. In our reply to Q.6 earlier we have given the future thrust of the SME policy as devised by SMEDA targeting some new sectors. In which in the technical field other than Light Engineering there is the plastics sector.

The future policy in the plastics sector will definitely cover the following:

- a) Plastic product manufacturers
- b) Plastic mold manufacturers
- c) Plastic testing centres
- d) Plastic recycling merchants
- e) Plastic raw material suppliers
- f) Customs duties on the import of plastic raw materials

The sector will be addressed as a whole, to devise sustainable sectoral policy to assure a future strong growth rate in domestic use and the export activity of plastic goods from Pakistan.



ANNEXURE-A

Small & Medium Manufacturing Industries in the Punjab

	Med.	Small
Cosmetics		3
Dyes & pigments		5
Foam	8	
Guar Gum	2	
Industrial/burn gases	62	
Industrial chemicals	31	
Lubricants	15	
Match factory	1	
Paint & varnish	51	
Petroleum products		1
Polythene bags	47	
PVC pipe	59	
Resin		6
Soap/detergent		356
Sodium Hydrosulphate		3
Sodium silicate		22
Sulphuric acid		2
Urea formaldehyde		1
Zinc sulphate		3
Agricultural implements		741
Aluminium utensils		377
Arms & ammunition		15
Auto parts		316
Baby cycles/fancy bicycles		40
Bicycles	5	
Bicycle parts		82
Boilers		1
Bolts & nuts		84
Bus/truck body maker		138
Cotton ginning machinery		12
Dies & blocks		27
Diesel engine (slow speed)		58
Domestic hardware		80
Electric goods		201
Electric motors		90
Fans/coolers		607
Flour mills machinery	4	
Foundry products		837
G.I/Steel pipe	47	
Gas appliances		15
Hand tools		44
Machine tools		60

Source: EAC - 2000

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Metal/steel furniture		243
Oil expeller machinery		22
Oil filter		1
Oil tanks		18
Polish machine		11
Power loom machinery/parts		35
Pressure cookers		11
Pumps/turbine & parts		72
Razor/blades	5	
Sanitary fittings		177
Saw milling machinery		14
Sewing machine/parts		48
Stainles steel utencils		176
Sugar mills machinery/parts	12	
TV/Radio		2
Textile machinery/parts		26
Tin printing		20
Tin/metal (cans/containers)		24
Tractor parts		132
Trunks		460
Wall clocks	1	
Washing machine	16	100
Weight & scale		53
Wire & cable	7	30
Wire knitting		36
Animal feed	20	
Bakery products		209
Beverages/Juices	35	
Biscuits & sweets	20	40
Cold storage		286
Dal/salt/spices grinding		233
Flour mills	513	
Food processing	31	
Hatchery	16	
Ice		1230
Ice Cream/Kulfi	3	39
Oil mills	500	1000
Poultry feed	49	150
Rice mills	70	800
Vegetable ghee mills	89	
Leather board	7	
Leather footwear	20	60
Leather products		141
Tannery	50	250

Source: EAC - 2000

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Brick kilns		3155
Building material		16
Cement products		342
Ceramics	36	
Earthen ware		32
Fire bricks & clay	2	
Glass & glass products	29	
Gypsum	13	
Gypsum fertilizer	1	
Lime Kiln		17
Marble industry		181
Pottery		159
RCC pipe		70
Sanitary ware/fitting		53
Stone crushing		349
Packing	41	
Paper & paper board	100	
Paper board particle	7	
Paper cup & cone		30
Paper board		41
Bicycle tyres & tubes	13	
IMS shoes		30
Plastic products		306
Plastic shoes	5	20
Rubber footwear	30	
Rubber products	49	
Tyres & tubes (vehicles)	2	
Absorbent cotton/surgical dressing		13
Art silk cloth/tapestry/sofa, curtain cloth		2265
Bed sheets	3	
Carpet yarn	3	
Carpets	40	500
Cotton cloth (power looms)		13227
Cotton ginning & pressing	1064	
Durri (flat cotton mats)		36
Embroidery		18
Hosiery		462
Jute Products		10
Polypropylene Bags	14	
Readymade Garments	35	
Specialized textiles	26	
Table printing		15
Tents/tarpaulins	4	
Textile processing	270	

Source: EAC - 2000

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Wool Processing	1	
Woolen Textile	80	
Ply & Ply wood	18	
Wooden Bobbins		2
Wooden furniture		1345
Cinemas		161
Elastic		1
Ball point pens & pencils	4	
Photographic products		3
Printing press		875
Sports goods	64	400
Total	3750	34510

Small & Medium Manufacturing Industries in the N.W.F.P.

	Med.	Small
Adhesive Tapes		8
Chemicals	36	
Cosmetics	20	
Fibre glass		3
Foam manufacturing	4	
Melamine crockery		9
Match box making	21	
Paints & varnishes		5
Petroleum products	4	
Pharmaceutical	38	
Rubber & plastic goods		144
Soap/detergent powder		44
Beverages/mineral water	13	
Biscuits/sweets		79
Cigarette Industry	24	
Dall milling		12
Flour mills	130	
Food industry		5
Ice & cold storage	144	144
Meat processing		2
Oil Expellers		6
Processing, Canning preservation of food & vegetables	13	
Rice Mills		36
Salt grinding		1
Spice grinding		2
Vegetable ghee/cooking oil	33	
Vermacellies		3
Arms & ammunitions		13
Brick plants		1
Detonators	2	
Dry battery cell		3
Gases		3
Motor car battery cell	1	
Other misc. items		1
Aluminium products		21
Electronics goods & appliances	36	
Engineering		54
Other metal products		72
Cement based industry		74
China & ceramics	6	
Marble		211

Source: EAC - 2000

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Mineral & metal products (other)		10
Paper & packages		44
Paper & paper board	8	
Printing press		27
Carpet		5
Garments		5
Hosiery		4
Leather & leather products		16
Silk mills		175
Textile (power looms)		39
Cork		1
Furniture		69
Wood		20
Total	533	1371

Small & Medium Manufacturing Industries in Sindh

	Med.	Small
Chemical/industrial gases	12	
Cosmetics	11	
Paints/varnishes	9	
Pharmaceuticals	80	
Rubber products/plastic goods	19	
Beverges/mineral water	14	
Biscuits, sweets/confectionery	43	
Flour mills	75	
Ice & cold storage		104
Poultry farms, foods & fish meal		52
Processing, canning & preservation of fruits & vegetables	24	
Rice mills	494	
Vegetable ghee/cooking oil	35	
Electrical/electronic goods & appliances	117	
Engineering	455	
Other metal products	49	
Cement products	7	
China clay & ceramics	11	
Marble/tiles		12
Paper products, packing card board, paper board	20	
Printing press		76
Carpets & rugs	8	
Embroidery/hosiery		31
Garments	13	200
Leather & footwear	15	
Silk mills	12	
Total	1523	475

Small & Medium Manufacturing Industries in Baluchistan - 1994

	Med.	Small
Chipboard/Formica Sheets/ Paper board	10	
Electric/Electronic appliances	8	
Engineering/Agri Machinery & auto parts	35	
Beverages	2	
Flour mills	10	130
Food & confectionery	17	
Ice factories		14
Rice mills		16
Furniture industry	8	
Ghee & edible oil industry	6	
Leather products		6
Pharmaceutical	5	
Chemical industry	20	
Plastic & rubber products	12	
Printing presses		6
Misc. mfg industry	22	
Total	155	172

Questionnaire to Pakistan Plastic Manufacturers Association

We, JICA, have received a project proposal for upgrading the techniques of manufacturing plastic molds from Pakistan Industrial Technical Assistant Center (PITAC), Lahore. In response to the proposal, we are planning to dispatch Preliminary Study Team in early April, 2000 in order to examine the feasibility of the proposed project in consideration of the present circumstances and future prospect in the field of metal-working industry and plastic industry in Pakistan.

In connection with the mission of the study team, we would like to obtain data and information related to the said fields of industry. We would appreciate it if you could cooperate with us by giving answers to the following questions at the time of our visit to your office on April 5, 2000.

Members of PPMA

1. How many member companies do you have? Please provide us the latest directory of members, if possible.

Plastic Industry

1. How many plastic manufacturers do exist in Pakistan, and how many workers are employed in plastic product industry?
2. Please inform us of the number of plastic manufacturers that are categorized as small-scale, medium-scale, and large-scale, respectively.

Plastic Mold

1. How much value of plastic molds has been manufactured in Pakistan over the last 5 years?
2. Please inform us of procurement route of plastic molds including imported molds.
3. How many plastic mold manufacturers exist in Pakistan?

Plastic Products

1. What kinds of plastic products are mainly manufactured in your country at present?

Please list the name of items.

2. What kind of plastic products are expected to be upgraded in the future? Please list the name of items.

Problems and Solutions

1. What are the major problems that many plastic manufacturers are now facing with?
2. What kind of technical services would you like to receive from PITAC?
3. Do you communicate with PITAC on regular basis for exchanging opinions or for conveying your technical request to PITAC?



Pakistan Plastic Manufacturers Association

REGD UNDER TRADE ORGANISATION ORDINANCE 1961

PUNJAB ZONAL OFFICE LAHORE.

140-MAIN INDUSTRIAL AREA KOT LAKHPAT, LAHORE TEL: 5118512 FAX: (042) 5115295

MEMBERS OF PPMA

- 1) How many member companies do you have? Please provide us the latest directory of members, if possible.
 - 124 members in Punjab Zone only. (List Attached)
 - 718 members in all Pakistan.

PLASTIC INDUSTRY

- 1) How many plastic manufacturers do exist in Pakistan, and how many workers are employed in plastic product industry?
 - Plastic Manufacturers: 1800+ (Organized Sector)
 - Workers: 200,000+
- 2) Please inform us of the number of plastic manufacturers that are categorized as small-scale, medium-scale and large-scale, respectively.
 - Small-Scale: 1100
 - Medium-Scale: 330
 - Large-Scale: 370
 - Un-Organized Sector: 3200

PLASTIC INDUSTRY

- 1) How much value of plastic molds has been manufactured in Pakistan over the last 5 years?
 - 1 – 1.5 billion US\$ (approximate data)
- 2) Please inform us of procurement route of plastic molds including imported molds.
 - In-House mold making
 - Local Market manufacturing.
 - Imported from.
 - Thailand.
 - Taiwan.
 - Japan.
 - Germany. } Main Source

Import Duty: 10 + 15 + 5 = 33%



Pakistan Plastic Manufacturers Association

REGD UNDER TRADE ORGANISATION ORDINACE 1961

PUNJAB ZONAL OFFICE LAHORE.

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- 3) How many Plastic mold manufacturers exist in Pakistan?
- *Established:* *None*
 - *Unorganized:* *160 (Bilal Gunj, Sher Shah, Gujranwala)*
 - *In-house mold Making:* *70 – 80 companies*

PLASTIC PRODUCTS

- 1) What kinds of plastic products are mainly manufactured in your country at present?
- | | |
|---|--|
| <input checked="" type="radio"/> <i>House-hold / Kitchen ware</i> | <input checked="" type="radio"/> <i>Automotive</i> |
| • <i>Electrical</i> | • <i>Electronic</i> |
| • <i>Agricultural</i> | • <i>Packaging</i> |
| • <i>Surgical Accessories</i> | • <i>Sports Accessories</i> |
| • <i>Shoes Accessories</i> | • <i>Toys</i> |
| • <i>Furniture</i> | |
- 2) What kind of plastic products are expected to be upgraded in the future? Please list the name of items.
- *Automotive parts & Accessories*
 - *Electronic*
 - *Household*
 - *Surgical Accessories*
 - *Shoe Accessories*
 - *Packaging & Cosmetics.*

PROBLEMS AND SOLUTIONS

- 1) What are the major problems that many plastic manufacturers are now facing with?
- *Non-availability of technical staff.*
 - *Lack of Research and Development.*
 - *Bad Quality Molds*
 - *High cost of Electricity.*
 - *Low Tech and old Machines*
- 2) What kind of technical services would you like to receive from PITAC?



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- *Research & Development and conception of new products.*
 - *Design and Development of molds.*
 - *Good casting and machinery facilities.*
 - *Testing of Plastics.*
- 3) Do you communicate with PITAC on regular basis for exchanging opinions or for conveying your technical request to PITAC?
- *No*

*MOHAMMAD ALI MIYAN
President*

Questionnaire to Pakistan Association of Automotive Parts & Accessories Manufacturers

We, JICA, have received a project proposal for upgrading the techniques of manufacturing plastic molds from Pakistan Industrial Technical Assistant Center (PITAC), Lahore. In response to the proposal, we are planning to dispatch Preliminary Study Team in early April, 2000 in order to examine the feasibility of the proposed project in consideration of the present circumstances and future prospect in the field of metal-working industry and plastic industry in Pakistan.

In connection with the mission of the study team, we would like to obtain data and information related to the said fields of industry. We would appreciate it if you could cooperate with us by giving answers to the following questions at the time of our visit to your office on April 11, 2000.

1. How many member companies do you have? Please give us the latest directory of members, if possible.
2. How many automotive parts manufacturers do exist in Pakistan, and how many workers are employed in the industry?
3. What kind of automotive parts are domestically manufactured in your country at present? Please list the name of items.
4. What kind of automotive parts are imported at present? Please list the name of items.
5. What are the problems that many automotive parts manufacturers are now facing with?
6. What kind of technical services would you like to receive from PITAC?
7. Do you communicate with PITAC on regular basis for exchanging opinions or for conveying your technical request to PITAC?



**Pakistan Association of Automotive
Parts & Accessories Manufacturers.**

C/o. National Automotive Components, 894-Circular Road,
Near Nigar Cinema, Lahore - Pakistan.

Tel : (042) 7237613-7312452. Fax: 7237613

Ref: PAAPAM/JICA/2000

Date: April 4, 2000

M/S Pakistan Industrial Technical Assistance Centre
Government of Pakistan, Ministry of Industries and Production
LAHORE.

▶ Attn: **MR M. A. JABBAR KHAN**
General Manager/Head of NPO
& APO liaison Officer for Pakistan.

Subject: **VISIT OF JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)**
TEAM

Dear Sir,

We thankfully acknowledge receipt of your fax No. JICA/PROJ-2000 dated April 01, 2000.

We welcome the JICA team and feel pleasure in hoisting a working lunch at XINHUA Restaurant, 94-C2 Gulberg III, Near Liberty Market, Lahore (Telephone No 5754598-9) at 1300 hours on 05 April 2000.

Para-wise reply to the questionnaire received under your above quoted fax is given below:

1. There are 200 member companies in the country. Latest directory of members is attached.
2. Presently 700 vendors are engaged directly with OFM and 1300 manufacturers are engaged in sub vending.
3. Already indicated in the directory.



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4. Presently we are importing all engines and transmission parts. Though we have facilities to manufacture these components in the country yet the standard of components is not enough for supply to OEM's.
5. We are facing five main problems in the automobile sector.
 - a. Management problems both of official management and technical management.
 - b. Although special steels are manufactured in Pakistan but unfortunately the quality produced does not conform to the international standards. Moreover, due to the low volume of production of the components, obviously orders placed on the foreign exporters for special steels are very low and unacceptable to them. If, however, we import large quantities that involves huge investment and causes an impact on the prices of the components being manufactured.
 - c. We are not manufacturing tools and gauges in our country so these products have to be imported from abroad.
 - d. Quality control problems exist specially in the heat treatment of the components.
 - e. There is lack of technical expertise and research work in the Engineering Sector. We, therefore, suggest that latest CNC machines and softwares should be introduced in the Technical Institutions in every major cities of the country so that the Engineering Industry could take advantage from such experts.
6. In the past PITAC provided good services to the engineering industry in the matter of welding heat treatment, chrome plating, surface treatment in the designing of tools, gauges and machining of different components. Now PITAC is not providing such services to the engineering sector.
7. Services of PITAC have become much costly and slow. So the industries are not interested to get the services of PITAC. Furthermore following factors have adversely effected on PITAC performances:
 - a. The staff employed are not competent and is unfamiliar with the modern techniques being presently adopted in the modern world.
 - b. Due to the internal Management problems, PITAC is lacking coordination within its departments due to which the job entrusted to them and supposed to be completed in days is delayed for months.



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- c. The high tech machines presently available with them are not in perfect order and they have no expertise to put these machines in running order. In view of this, the job given to PITAC obviously loses its importance because of the considerable delays and of high cost.

Thanking you.

Yours faithfully,

MUHAMMAD SALEEM
Chairman.