Enhancing
SOCIO-ECONOMIC DEVELOPMENT through investing in human capital in Punjab and Sindh

A Report on
MARKET ASSESSMENT AND SKILL GAP ANALYSIS

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MARKET ASSESSMENT AND SKILL GAP ANALYSIS

Awaz Foundation Pakistan
AwazCDS
Centre for Development Services

RAHNUMA
FAMILY PLANNING ASSOCIATION OF PAKISTAN

LIST OF ABBREVIATIONS

EC	European Commission
TVET	Technical and Vocational Educational and Training
TEVTA	Technical Education and Vocational Training Authority
CCA	Certificate Course in Auto Cad
IT	Information Technology
DAE	Diploma of Associate Engineer
DIT	Diploma in Information Technology
UC	Union Council
LHW	Lady Health Worker
FGDs	Focus Group Discussions

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EXECUTIVE SUMMARY

Supported by EC, the project, 'Enhancing socio-economic development through investing in human capital in Punjab and Sindh' seeks to improve the TVET sector by working on relevance, quality, access and equity of TVET services predominantly for the deprived communities, and exclusively focuses on rural women and youth in Sindh and Southern Punjab. The target districts for the project include Multan, Muzaffargarh, Vehari, Rajanpur in Punjab and district Tando Allahyar, Thatta and, Mirpur Khas in Sindh.

This report documents a study comprising a market assessment and skill gap analysis being carried out as part of the preparatory stage by the project. The study aims to identify marketable skills, technical and vocational training needs of rural women and youth, barriers, challenges and opportunities regarding youth and women's employability and self-employment in the seven target districts. The present study employed both quantitative and qualitative data gathering tools including a questionnaire survey, FGDs and In-depth interviews with key stakeholders complemented by a literature review.

KEY FINIDINGS

In mapping employment opportunities in wage and self-employment in the target districts, the findings note that the present market structure in most of the target districts mostly comprises of small and medium sized enterprises. The study findings indicate that a very small percentage of the target group is presently engaged with the formal industrial sector. In general, women are completely absent from the work force in these industries except in the garments sector. The other component of the present market comprises shops, boutiques and display centers for local handicrafts including clothes, shoes and other accessories. The findings note that this segment of the market does not engage directly with the product manufacturing or those developing the products but relies on an intermediary tier. Orders are mostly placed through middlemen who work on commission basis with the shops. The business intermediaries/ middlemen, in turn work with individuals or groups of individual producers on piece-rate basis. Most of the producers are home based women workers. The work arrangements in this segment are mostly informal and unstructured. The study findings indicate that a large majority of the target group, particularly comprising of women, is presently engaged with this segment of market.

The study findings indicate that a very small percentage of the target group is presently engaged with the formal industrial sector. In general, women are completely absent from the work force in these industries except in the garments sector.

The analysis from the market assessment study notes that the present market representing different segments of employers and self-employment opportunities is not homogenous with distinct skills requirements. While there is

some level of overlap in the non-technical skills across the segments, the functional skills required remain significantly industry and sector specific. This dimension is of particular relevance to the project while designing interventions to address the skills gap based on the market demand.

In general, the findings note a very limited trend of acquiring formal skill development trainings in the target areas across the two provinces. A comparative analysis across gender notes that more women than men have acquired some kind of skills trainings. The channel of acquiring trainings, however, remains informal with most women learning the skills (primarily tailoring and embroidery) at home. For the men who have received some kind of skill development training, it is reportedly through the 'Ustaad-Shagird' model (on-job mentoring) in specific trades like motor mechanic, electrician, plumber etc.

In Punjab, the existing skill inventory among women in the target communities comprises primarily of informally acquired skills in stitching, tailoring and embroidery. The situation in Sindh is no different except that skills are more diversified in the larger ambit of embroidery and handicrafts. In both the provinces, most men respondents appear to be informally trained in specific trades like electrician, motor mechanic, home appliances repair etc.

An institutional assessment of the selected TEVTA institutes in both Sindh and Punjab reveals that presently these institutions are providing services to a very small proportion of the target population. The findings note that at present the government managed TVET sector is characterized by outdated curriculum, a mismatch between skills taught and those demanded by the industries, inadequate quality assurance mechanism, inadequate physical and learning resources and low participation of the private sector necessary to bridge the skills-market gap. The institutions lack a culture in which training is driven by market based projections of future skill requirements. In addition, the report observes that the TVET system is not demand driven; attachments and linkages to industry are fragile, poorly planned and inadequately supervised. The challenge is further aggravated by poor quality of training resulting from lack of appropriate (qualitatively and quantitatively) tools and equipment and the inflexible curriculum followed in TEVTA institutions.

The other component of the present market comprises shops, boutiques and display centers for local handicrafts including clothes, shoes and other accessories. The findings note that this segment of the market does not engage directly with the product manufacturing or those developing the products but relies on an intermediary tier. Orders are mostly placed through middlemen who work on commission basis with the shops.

Commenting on the quality of trainings by TEVTA institutes, most of the respondents representing employers and the industry said that the TEVTA graduates were trained only in basic skills. In most cases, the employing industry has to undertake in-house trainings for the TEVTA graduates to bridge the requisite skill and knowledge gap. The trainings imparted by TEVTA institutes lack practical orientation and are not hands-on or relevant particularly in the industry-specific context.

The most significant skill gap identified by the employers is the lack of capacity of the graduates to use modern machines, equipment and tools, trade knowledge and practical exposure. The findings note that the most critical issue underpinning the set of challenges from the redundancy of the courses offered to the archaic training methodologies and tools is the gap between the industry/ market and the training service provider institutions.

In exploring the reasons for low enrollment in formal training institutes among the target group, the findings note that these range from lack of information about the presence of TEVTA institutes in the areas to limited access due to less number of institutes in the selected villages. For many, however, the primary reason for not enrolling in the skills development programs, appears to be a low value

associated with vocational/ training skills acquired through formal channels, particularly government institutions as the trainings offered are not considered to be based on marketable skills. For women, in addition to these, challenges related to mobility and family support were prioritized as key impediments to participation in skill development programs. Most women respondents shared that travelling alone to and back to the TEVTA situated away from their villages was impossible in most cases.

The study findings note that in sum, the three core pillars in the skill demand and supply context comprising of the industry/employers, the communities and the TVET institutes are presently disconnected. The skill demand generated from the market/ employers is not matched by the present skill inventory present in the communities or developed by the TEVTA institutes. This disconnect has a direct impact on the expected employment outcomes which should result from interventions in skill enhancement and trainings.

An institutional assessment of the selected TEVTA institutes in both Sindh and Punjab reveals that presently these institutions are providing services to a very small proportion of the target population. The findings note that at present the government managed TVET sector is characterized by outdated curriculum, a mismatch between skills taught and those demanded by the industries, inadequate quality assurance mechanism, inadequate physical and learning resources and low participation of the private sector necessary to bridge the skills-market gap.

PROJECT BACKGROUND AND RESEARCH METHODOLOGY

1. PROJECT BACKGROUND AND RESEARCH METHODOLOGY

1.1 BACKGROUND OF THE PROJECT

Supported by EC, the project, 'Enhancing socio-economic development through investing in human capital in Punjab and Sindh' seeks to improve the TVET sector by working on relevance, quality, access and equity of TVET services predominantly for the deprived communities, and exclusively focuses on rural women and youth in Sindh and Southern Punjab. It also aims to improve access to and quality of TVET services by designing, and implementing demand driven training programmes, using innovative approaches and new teaching and learning methodologies, and improved linkages between TVET graduates and labour market service providers for job counselling, job placement and facilitation for self-employment including access to micro-credit services.

In line with the EC's gender equity strategy in TVET sector, the project aims to redress the stereotyping that exists at the level of family and school by encouraging both boys and girls to go for “non-traditional” activities through skill development streams. While education plays an increasingly important (though still relatively small) role in occupational attainment for women, cognitive skills are found to have substantially high payoffs. Therefore, CARE aims at strengthening TVET institutes through including life skills training for trainees.

The project will be implemented in seven districts - Multan, Muzaffargarh, Vehari, Rajanpur in Punjab and district Tando Allahyar, Thatta and , Mirpur Khas in Sindh. The project is being jointly implemented by CARE and AWAZ Community Development Society in Punjab and Rahnuma Family Planning Association of Pakistan (FPAP) in Sindh. The project will target rural women and youth belonging to poor, marginalized and vulnerable communities, and work with TVET, private sector, government and civil society organizations to enhance their employability and income generation skills and opportunities.

The key elements of the project implementation strategy include:

- Private Sector Led Training Design and Delivery: CARE and partners, in coordination with TVET providers will work with the private sector and industry to explore the skills gaps and market demands, and facilitate the designing/improvement of TVET training curricula that is need based and in line with the requirements of the local industry.

- Partner Focused Implementation: CARE will focus on project implementation through local partners. The targeted technical input and support from CARE will build the capacity of these partners to overcome shortcomings of past projects.

- Strong Commitment to Gender Equity Approaches: As evidenced by their core programming documents, public web-sites and program implementation, CARE and its partners have long-standing commitments to gender equity programming.

Innovation in Implementation: The project components exemplify CARE's approach to creative and pragmatic implementation based on relevant experience in South Asia.

1.2 KEY PROJECT RESULTS

The project aims to achieve the following results:

Result 1: An improved TVET Programme is established for rural women and youth

This result will build private sector leadership in the design and effective delivery of need based TVET services for workforce development. Key elements of the approach include: with substantial input from the private sector and industry in conducting skills mapping/gap and market analysis, prioritizing the sectors with the highest potential for job growth and self-employment, designing of new or improvement of relevant TVET vocational curricula, capacity building of TVET instructors on how to effectively deliver the new and/or revised vocational training modules, and training of poor rural women and youth by TVET. Under this component the project will train a total of 2800 women and youths in eight prioritized vocational disciplines; the duration of these courses will be three and six months depending on the previous levels of training which the women and youths already possess. TVET bodies will also be facilitated on the information dissemination about the services offered.

Result 2: Innovative Approaches and new teaching methodologies are developed and access to TVET services is increased

This result will build on lessons learned and adapts successful approaches from CARE and partner's past experiences as well as the scheduled baseline. This entails enhancing the employability of 1400 youth and women most of whom will be additional beneficiaries' to Result 1 by undertaking three month service industry and micro entrepreneurship training programme in the target districts' government and semi government TVET institutes. Furthermore, with an aim to introduce and mainstream Life Skills Training in TVET services, CARE and its partners will develop a training module and organize TOT for TVET instructors. Similarly, CARE with training support from TVET will implement a pilot initiative (in 2 districts, one in each province) on Rural Sales Women whereby 50 newly identified poor and destitute women will be trained and linked with the private businesses and companies for marketing and sales of their products. The project will also launch school based vocational skills orientations training with an aim to introduce professional streams for boys and girls in 21 high schools, approximately 3150 students will be provided orientation in vocational skills.

Result 3: Linkages between TVET graduates and employers are promoted

This result will strengthen the workforce development system by increasing the efficiency of the linkages between employers, job seekers, and TVETs through job fairs, exhibitions and networking events. These events will focus on innovations in technology, new opportunities, localized dissemination of information. Staff of TVET bodies shall be trained on counseling and coaching of the TVET graduates on career advice. The project shall also facilitate the establishment of pilot Career Counseling Centers, preferably in the TVET bodies where staff has been given training. CARE and partners through networking and mobilization of broad based allies in the civil society and private sector will undertake targeted advocacy with the policy makers and other stakeholders for improved TVET infrastructure, resource allocation and quality technical education. In rural areas, women groups shall be formed comprising of women home-based workers. Training shall be provided to these groups to improve the vocational skills they already possess and use for supplementing their family income. The project shall facilitate their linkages with relevant businesses to have share in the value chain process.

Result 4: Small Enterprises and self-employment amongst rural women's and youth is promoted and linkages with MFI's are strengthened

This result will focus on promoting linkages between MFIs, TVET and TVET graduates for enabling poor women and youth to access credit for setting up their micro-enterprises. Efforts will be made to create linkages between micro-entrepreneurs and the local industry/private sector for marketing of the products made by the newly established micro-enterprises. With its existing presence and experience in Pakistan, CARE is able to mobilize staff quickly, manage resources effectively, and dynamically interact with the implementing partners and other key stakeholders to ensure that the proposed project is

efficiently and effectively delivered within the allocated resources and time.

1.3 MARKET ASSESSMENT & SKILL GAP ANALYSIS

This report documents a study comprising a market assessment and skill gap analysis being carried out as part of the preparatory stage by the project. The study aims to identify marketable skills, technical and vocational training needs of rural women and youth, barriers, challenges and opportunities regarding youth and women's employability and self-employment in the seven target districts.

Key objectives of the study included

- An assessment of the skills in demand by employers, industry, local and SMEs and businesses
- An assessment of the present skills profile of the target groups in relation to the current skills demand
- An assessment of the TEVTA – Market/ Industry Linkage and level of collaboration
- A mapping of private sector employers in the target districts and identify opportunities for medium and large scale employment and collaboration

1.4 RESEARCH METHODOLOGY

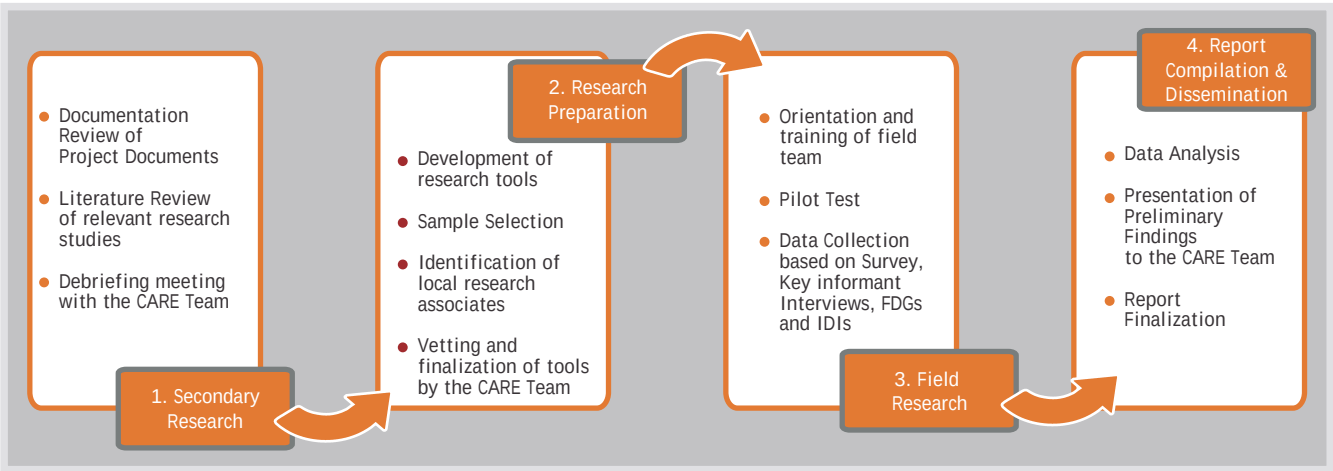
The present study employs both quantitative and qualitative data gathering tools including a questionnaire survey, FGDs and In-depth interviews with key stakeholders complemented by a literature review.

The methodology followed a highly consultative and participatory approach with the CARE team engaged at all stages of the research. The research framework and tools were designed following extensive rounds of consultation with the CARE team. The field work for primary data collection commenced following the approval of the data collection tools and field plan by CARE. Field activity was also carried out with CARE and implementing partners' staff accompanying the research teams in both Punjab and Sindh.

Following a quantitative data, a series of FGDs (49 in all – 7 in each district) were conducted with men and women in the selected districts. The study also included carrying out an institutional assessment of selected public sector managed TVET institutes. The assessment was carried out using both quantitative as well as qualitative tools. The quantitative tool comprised of a checklist aimed at assessing the infrastructure, enrollment and resource availability at the institutions. The qualitative aspect, on the other hand, reviewed the opportunities and challenges in terms of current program offerings as well as assessed potential for introducing new market oriented training programs.

In-depth interviews were also conducted with present and potential employers in services and industry in the targeted districts. These included representatives/ management of selected industries, service sectors organizations, small and

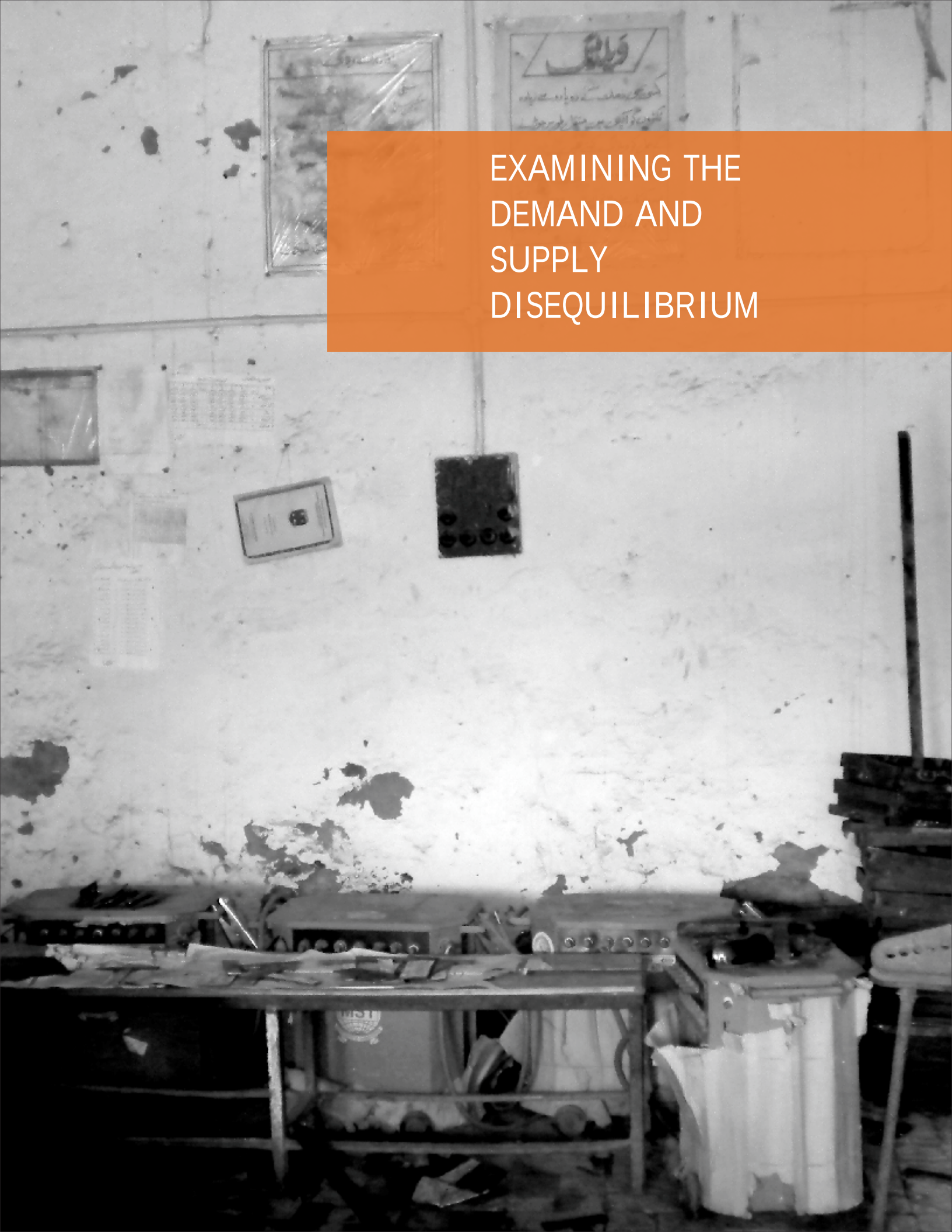
FIGURE 1: KEY RESEARCH MILESTONES



medium sized businesses etc. This data was collected to assess the present numbers employed, the qualification and available skill set of those employed, impact of skills training on retention and career progression etc. In addition to the current and potential employers, several in-depth interviews were conducted with representative of micro finance institutions to assess the coverage of services to the target group. (A detailed data collection plan is shared as Annexure B.)

Following the completion of field based data collection activity, a rigorous data compilation and analysis process was initiated. For the qualitative data, the analysis was carried out in multiple workshops with the field team. The analysis followed a sequential process consisting of raw data (statements made by the participants), descriptive (summary statements of the respondents' comments), and interpretation (building on the summary statements and presenting the meaning of the data). The overall trends and patterns as well as frequently mentioned and strongly held opinions were noted and included in the analysis. The preliminary findings of the study were presented to the CARE team in a detailed debriefing session. The report has been compiled following the input and feedback received from the session.

EXAMINING THE DEMAND AND SUPPLY DISEQUILIBRIUM



2. EXAMINING THE DEMAND AND SUPPLY DISEQUILIBRIUM

2.1 MAPPING EMPLOYMENT OPPORTUNITIES IN WAGE AND SELF-EMPLOYMENT IN THE TARGET DISTRICTS

This section presents the analysis based on the market assessment in the target areas in Punjab and Sindh. First part of the section describes the major characteristics of the present 'market' in the selected districts. Subsequent sections explain the skills supply and demand in the current scenario.

Understanding the Market

The findings note that primarily an agriculture based economy exists in all the target areas. The survey findings resonate with this assertion as majority of the respondents (60 – 70%) appear to be engaged directly with the agriculture sector. The present market structure in most of the target districts mostly comprises of small and medium sized enterprises mainly in the textiles, sugar and ghee industries. Table 1 presents sectoral representation of the key industries in the target districts which were studied for the present exercise.

TABLE 1: SECTORAL REPRESENTATION OF THE KEY INDUSTRIES IN THE TARGET DISTRICTS

PUNJAB		
Multan	Industry	Textile Industry, Ghee (Edible oil) Mills, Motorbike Assembling, Flour Mills, Ginning Factories, Spinning mills
	Local Businesses and Markets	Poultry rearing Livestock management Garments' Stitching and Tailoring Agri-Products' Sale services Agricultural and Fruits farming Boutiques, Khussa Sto
	Small Home based work	Local crafts Power and Gota Kanari looms Hand and machine embroidery Zari work
	Private Sector Organizations	Allah Din Group of Industries
Rajanpur	Industry	Sugar Mills, Flour Mills, Ginning Factories
	Local Businesses and Markets	Agri-products' sale Services Live Stock management Poultry rearing Agricultural farming
Muzzafargarh	Industry	Textile Mills, Ginning factories, Sugar Mills Power generation plants, Flour mills
	Local Businesses and Markets	Live Stock management Poultry rearing Agri-products Sale Services Auto machinery workshops and Spare parts
	Private Sector Organizations	Nestle Milk Collection Center
Vehari	Industry	Flour Mills Ginning factories
	Local Businesses and Markets	Live Stock management Agri-products sale Services Agricultural Farming
SINDH		
Tando Allahyar	Industry	Sugar mills, Juice Factory
	Local Businesses and Markets	Outlets for stitching and embroidery
	Small Home based work	Local Crafts, Boutiques Embroidery (Rilly Making) Stitching
Thatta	Industry	Cement Factory, Steel Mills, Jute Mills
	Local Businesses and Markets	Outlets for stitching and embroidery
	Small Home based work	Local Crafts, Boutiques Embroidery (Rilly Making) Stitching
Mirpur Khas	Industry	Machinery Spare parts' factories
	Local Businesses/Markets	Local Crafts
	Small Home Based Work	Embroidery, rilli making, stitching

The findings indicate that with the exception of Multan in Punjab which represents a larger industrial base comparatively with a presence of both service and manufacturing sectors, the formal sector in all other districts mostly comprises of small scale industry. Ginning units in the textile sector, sugar, flour and ghee mills etc. form the bulk in the present industry. These units are usually not labour-intensive and do not require highly specialized work force. On the other hand, spinning and garments units in the textile sector, motor bike and spare parts manufacturing, steel and cement factories require larger work force with specialized skills. Moreover, bigger and medium sized industries require minimum education qualification up till matric or intermediate for recruitment in work force. The study finding note that a very small percentage of the target group is presently engaged with the formal industrial sector. In general, women are completely absent from the work force in these industries except in the garments sector. None of the women respondents of the baseline survey in all the 7 districts report to part of this group.

The third component of the present market comprises shops, boutiques and display centers for local handicrafts including clothes, shoes and other accessories. The findings note that this segment of the market does not engage directly with the product manufacturing or those developing the products but relies on an intermediary tier. Orders are mostly placed through middlemen who work on commission basis with the shops. The business intermediaries/ middlemen, in turn work with individuals or groups of individual producers on piece-rate basis. Most of the producers are home based women workers. The work arrangements in this segment are mostly informal and unstructured. For larger chain stores and boutiques, procurement is centralized and their local outlets and shops have no role in engaging local producers. The study findings indicate that a large majority of the target group, particularly comprising of women, is presently engaged with this segment of market.

Other employment opportunities noted particularly in Punjab appear to be in wage employment in the government managed health and education sectors. However, these require certain educational qualifications as mandatory for entry. At present, a very small percentage of the target communities is engaged with this sector, primarily because of very low rate of literacy prevailing in the target areas.

2.2 EXAMINING THE SKILLS DEMAND – THE PRESENT SCENARIO

As explained in the earlier section, at present the market in the target districts is represented by 3 distinct segments including the medium sized industry, small manufacturing units and a home based sector. As part of the study, representatives from each of the three segments were interviewed. Most of the interviews were held with the senior management of the organizations to seek their views on the skills demand for their respective industries.

The findings note that each of the three sectors requires different types of skills sets. For a detailed analysis, the

FIGURE2: SKILLS DEMAND BY EMPLOYERS

SEGMENT 1 MEDIUM SIZE INDUSTRY

Functional Skills
- Technical skills specific to industry in mechanical and mechanical operations.
- Mechanic repair and maintenance.
- Administration operations and office assistance.
- Computer skills.

Non-Technical Skills
- Communication and interpersonal Skills.
- English language.

SEGMENT 2 SMALL INDUSTRY

Functional Skills
- Technical Skills specific to industry.
- Machine repair and maintenance.
- Basic administration operations.
- Computer skills.

Non-Technical skills
- Functional literacy and numeracy skills.
- Multi skills in supervision, vender management.

SEGMENT 3 HOME BASED SECTOR

Functional Skills
- Skills up gradation based on market needs.
- Quality control.
- Enterprise development and management.
- Bulk purchasing and inventory management.
- Pricing
- Book keeping.

Non-Technical Skills
- Negotiation Skills.
- Functional literacy and numeracy skills.

TABLE 2: PRESENT SKILL SET AND CHANNELS OF ACQUIRING TRAININGS	
PUNJAB	
Men	Women
Majority of the respondents, about 80% , say that they have not acquired any type of skill development training	Only 8% of the women have received trainings through formal channels (govt. run institutions and NGOs managed programs)
About 15% say that they have acquired some kind of skills/ technical training	Majority (60%) have acquired training in stitching and embroidery through informal channels
Out of those who have received trainings, only 5% have acquired it through formal channel while others received it through informal means	Almost a quarter (25%) of the respondents said that they had acquired no trainings formally or informally.
SINDH	
Men	Women
Majority of the respondents, about 80%, say that they have not acquired any skill development training	Less than 2% of the women respondents have received trainings through formal channels (govt.)
About 13% say that they have acquired some kind of skills/ technical training.	Majority (80%) have acquired training in stitching and embroidery through informal channels
Out of those who have received trainings, only 6% have acquired it through formal channel while others received it through informal means	Almost 15% of the respondents said that they have not acquired any skills trainings

required skills sets have been categorized in two dimensions: functional skills and non-technical skills.

Figure 2 illustrates the skills demand by the 3 market segments.

2.3 THE SUPPLY SIDE OF THE STORY – PRESENT SKILLS INVENTORY IN THE TARGET COMMUNITIES

The baseline study complimenting the market assessment and skill gap analysis, attempted to explore the present skill sets, trend, preference and type of trainings that the target group had been engaged with in the selected districts. In general, the findings note a very limited trend of acquiring formal skill development trainings in the target areas across the two provinces. A comparative analysis across gender notes that more women than men have acquired some kind of skills trainings. The channel of acquiring trainings, however, remains informal with most women learning the skills (primarily tailoring and embroidery) at home. For the men who have received some kind of skill development training, it is reportedly through the 'Ustaad-Shagird' model (on-job mentoring) in specific trades like motor mechanic, electrician, plumber etc. Table 2 illustrates the present skill sets and channels of acquiring trainings by the baseline respondents in the target districts.

In Punjab, the existing skill inventory among women in the target communities comprises primarily of informally acquired skills in stitching, tailoring and embroidery. The situation in Sindh is no different except that skills are more diversified in the larger ambit of embroidery and handicrafts. In both the provinces, most men respondents appear to be informally trained in specific trades like electrician, motor mechanic, home appliances repair etc.

A district wise presentation of current skills sets in the target communities and the source of their acquisition is given in Table 3.

2.4 THE TVET SECTOR - LINKING THE SKILLS SUPPLY AND DEMAND

This section presents an overview of a selection of present government run training institutes in the selected districts. In all 24 TEVTA institutes were visited during the course of study, with 13 institutes in Punjab and 11 in Sindh. An analysis follows the description of TVETs highlighting key features of the present skills training service providers and their programs.

An institutional assessment of the selected TEVTA institutes in both Sindh and Punjab reveals that presently these institutions are providing services to a very small proportion

TABLE 3: DISTRICT WISE PRESENTATION OF CURRENT SKILLS SETS

DISTRICTS	Women		Men	
	Informally Acquired	Formally Acquired	Informally Acquired	Formally Acquired
Vehari	Stitching	LHW course	Tailoring Electrician	Motor mechanic
Muzzafargarh	Stitching, Embroidery	-	Tailoring, mechanic, Bricks making, Welding	-
Rajan Pur	Embroidery, Stitching	LHW course	Plumbing, welding, tailoring	-
Multan	Stitching, Embroidery, Zari work, beauty salon work	Beautician course	Welding, plumbing, Mobile repairing, Bricks making	Electrician
Thatta	Rilli, Sindhi embroidery, block printing	-	Carpenter, plumbing, mobile repairing	Computer course
Tando Allahyar	Traditional cap making, Rilli, Sindhi embroidery, Paraanda (hair accessory) making, stitching cushion covers	-	Mobile repairing, Plumbing, electrician	Motor mechanic
Mirpur Khaas	Sindhi embroidery, rilli making, cutwork	-	Masonry, Tailoring, Electrician, mechanic	-

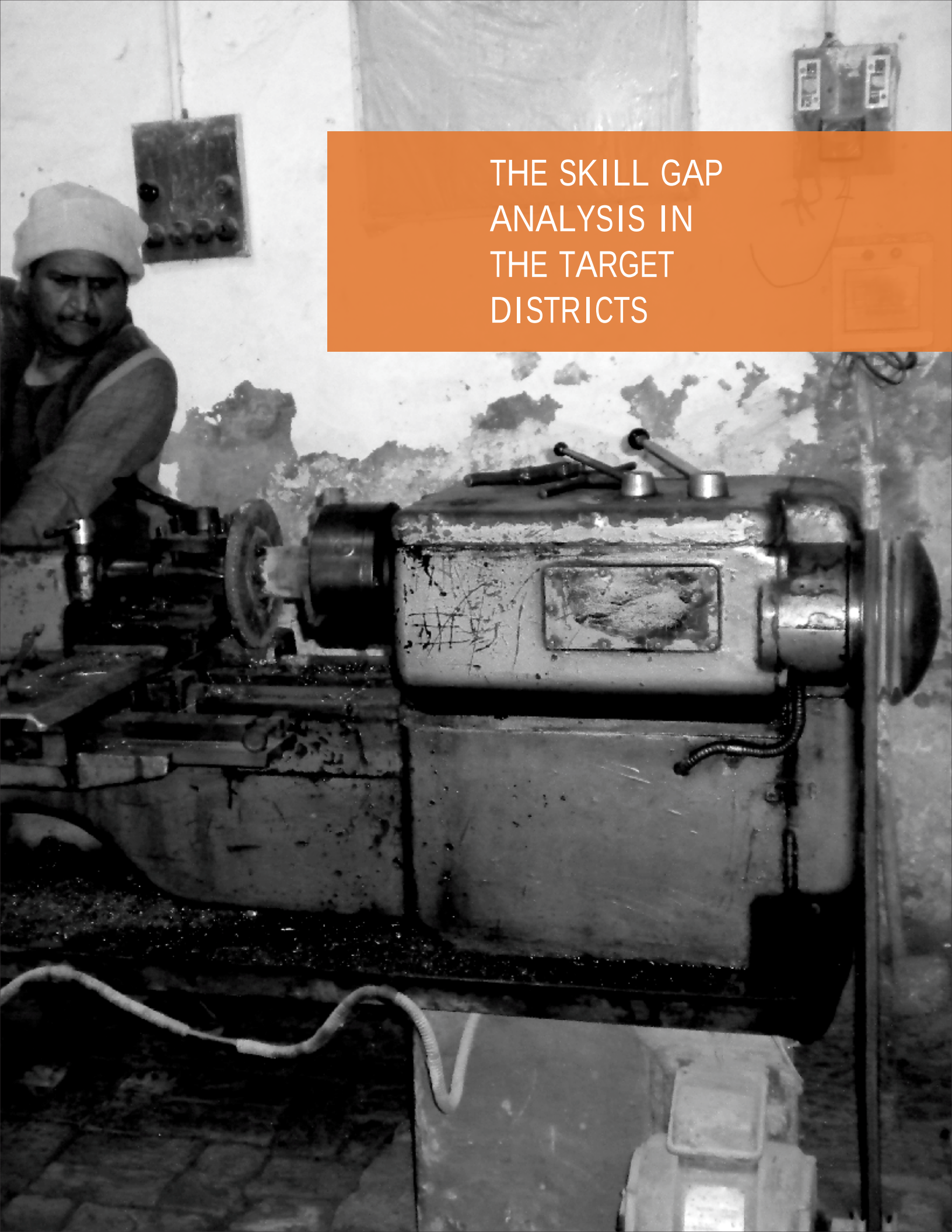
of the target population. The assessment findings note that at present the institutions under TEVTA are offering short term vocational courses and 1-3 year diploma courses in technical fields. In most of the vocational institutes, the average enrollment ranges from 30 – 35 students for boys and about 25 – 50 for girls. The diploma courses, offered primarily to men in the fields of engineering and IT, typically have higher rate of enrollment, mostly up to 100 demonstrating a higher demand for the courses.

Table 4 presents the commonly offered courses in the TEVTA institutes for men and women.

TABLE 4: TRAINING COURSES FOR MEN

Training Courses for Men				
Mechanical	DAE (electrical, Mechanical, civil)	Auto mechanic	Tractor mechanic	CCA and Auto Cate
Welding	Short hand	Machinist	Refrigerator & Air-conditioner Repair	Electronics (radio/TV)
Electrician	Diploma in Commerce	Carpenter/ Wood work	Plumbing	Diploma in IT
Course duration for short courses: 3 – 6 months			Diploma courses: 1- 3 years	
Training Courses for Women				
	Beautician	Machine embroidery		
	Dress/ Fashion designing	Hand embroidery		
	Tailoring	Computers		
Most courses offered to women are short ones running for 3-6 months with only dress making course offered for a year.				

THE SKILL GAP ANALYSIS IN THE TARGET DISTRICTS



3. THE SKILL GAP ANALYSIS IN THE TARGET DISTRICTS

The DAE graduates who come to us do not have the requisite skills in engineering needed for our machinery.
HR Manager – Fateh Textiles, Hyderabad

The graduates usually do not even know the names of machinery and tools.
GM - Indus Sugar Mills, Rajanpur

This section presents a detailed skill gap analysis based on the market assessment study and perspectives of the key stakeholders representing the demand and supply equilibrium including employers as well as men and women respondents from the target communities.

3.1 SKILL GAP AND THE INDUSTRY

Commenting on the current scenario, most of the representatives of the employers segment said that at present, a very small proportion of TEVTA graduates were working in the local industry. The TEVTA graduates were mostly employed in low-end technical jobs (mechanical/ electrical department) as they 'lacked the requisite skills set specific to industry'.

According to most of the respondents, the TEVTA graduates were trained only in basic skills. In most cases, the employing industry has to undertake in-house trainings for the TVET graduates to bridge the requisite skill and knowledge gap. The trainings imparted by TEVTA institutes lack practical orientation and are not hands-on or relevant particularly in the industry-specific context.

The most significant skill gap identified by the employers is

the lack of capacity of the graduates to use modern machines, equipment and tools, trade knowledge and practical exposure. The findings note that the most critical issue underpinning the set of challenges from the redundancy of the courses offered to the archaic training methodologies and tools is the gap between the industry/market and the training service provider institutions.

> *TEVTA institutes should identify marketable skills and provide trainings accordingly.*
> Proprietor, Ali Boutique, Hyderabad

Almost all of the respondents representing different industries said that the TEVTA institutes have not approached the industry for input in curriculum design or possible expansion/ revision of the present courses. Joint platforms like the Chambers of Commerce and Industry were also included in the study as a key stakeholder. The analysis reveals that the Chambers have yet to be leveraged by the TEVTA institutes for as means for outreach to the local industry.

ADDRESSING THE SKILLS GAP ISSUE – A LOCAL SOLUTION

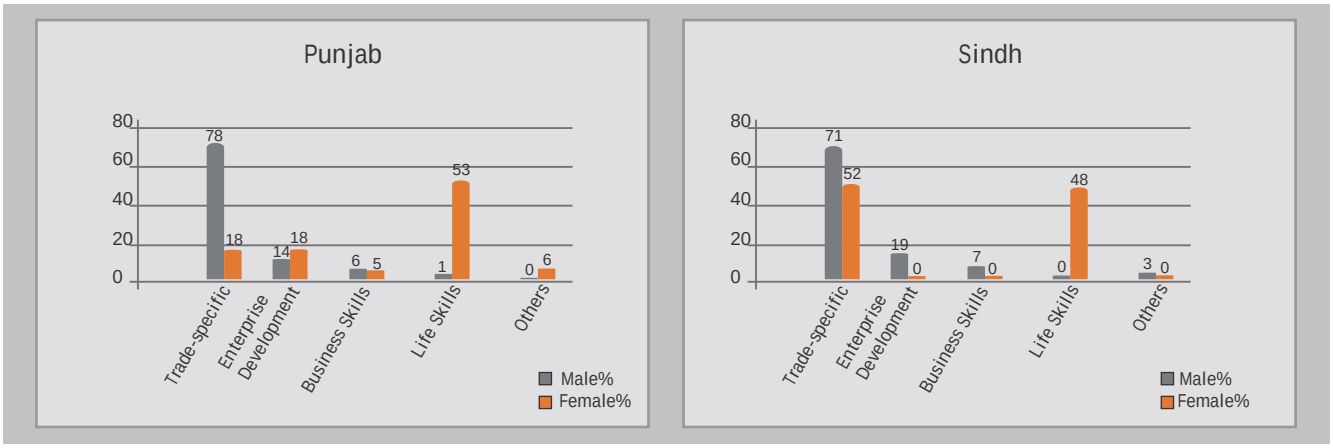
Consistently confronting the quality issue in the present technical skills provision, the management at Amirilli Steel Mills decided to set up their own Technical Training institute in Dhabeji, Thatta. The institute provides DAE courses for men. Tailored to meet their industrial requirement, the training provides industrial attachment and practical work exposure to its students. Upon completion of the course, the mill provides employment and job placement opportunities to its graduates. Gauging the local demand and the supply side deficit, the institute also set up a training centre for girls/ women offering tailoring and stitching courses. At present the centre has enrolled 40 girls. It is also planning to open a computer center for girls citing demand from community.

Skill shortages identified by the local small and medium industry are summarized in the Table 5.

TABLE 5: SKILL SHORTAGES IDENTIFIED BY THE LOCAL SMALL AND MEDIUM INDUSTRY

Skills Demand – Industry/ Employers	Skills Gap – Industry/ Employers
FUNCTIONAL SKILLS	
Technical skills specific to industry in mechanical and electrical operations	At present only generic courses are offered with limited coverage
Machine repair and maintenance	Industry specific courses are not offered
Administration operations and office assistance	Not offered in the institutes in the target districts
Computer skills	Limited coverage – Generic courses are offered in some institutes
NON-TECHNICAL SKILLS	
Functional literacy and numeracy skills	Not offered in the institutes in the target districts
Communication and interpersonal skills	Not offered in the institutes in the target districts
English language	Not offered in the institutes in the target districts
Multi skills in supervision, store and vendor management	Not offered in the institutes in the target districts

FIGURE 3: PREFERENCE OF TRAINING



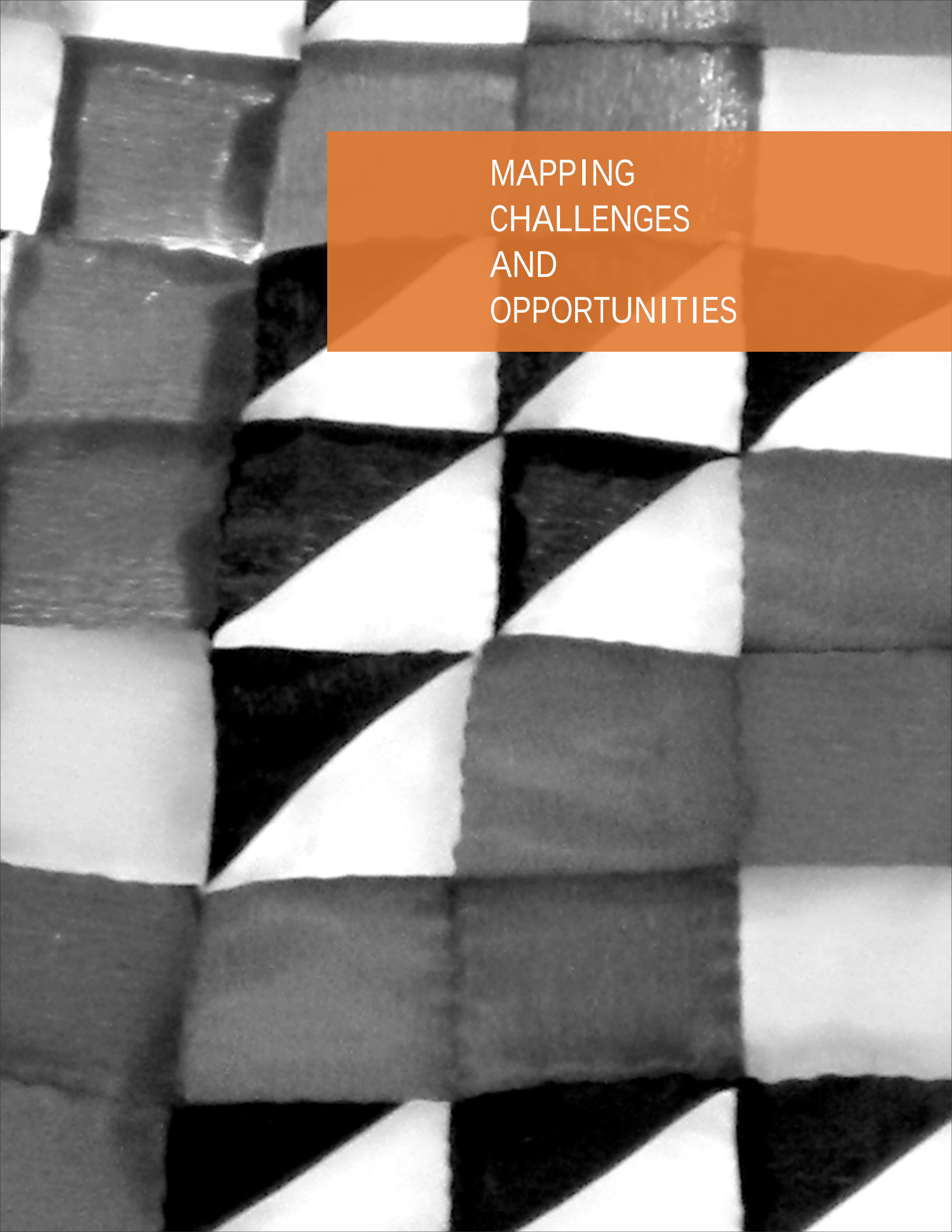
3.2 SKILL GAP IN SELF-EMPLOYMENT

In assessing the skills gaps as articulated by the communities, the findings note a majority of the women respondents appeared keen to receive trainings in life skills. For most of them, basic numeracy and literacy skills topped the list of life skills that they wished to receive. At present, the TEVTA institutes visited in the target districts are not offering any such types of courses. Trade specific trainings as articulated by men included electrician, motor mechanic, mobile and home appliances repair courses while most of the women indicated skill improvisation in embroidery and stitching and beautician as trade specific courses. (Figure 3) The findings note that while most of the men respondents who report to be trained in some kind of employable/ income generating skills had acquired the trainings through apprenticeship at shops working with mentor. Although not formally taught, they appeared to have some sense of basic business/enterprise management through apprenticing at shops/enterprises. On the other hand, women respondents in the target communities did not appear to possess any type of enterprise development or business management skills. In general, most women work individually often in informal work arrangements engaging family members with virtually no direct linkage with the market.

Given the predominance of self-employment trend in the target communities, Table 6 summarizes the skill shortage at present.

TABLE 6: SELF-EMPLOYMENT TREND IN THE TARGET COMMUNITIES

Skills Required – Self Employment	Skills Gap
FUNCTIONAL SKILLS	
Skill up gradation based on Market needs	Not offered in the institutes in the target districts nor informally acquired
Quality control	Not offered in the institutes in the target districts nor informally acquired
Enterprise development and management	Not offered in the institutes in the target districts nor informally acquired
Bulk purchasing and inventory management	Not offered in the institutes in the target districts nor informally acquired
Pricing Strategy	Not offered in the institutes in the target districts nor informally acquired
Book keeping	Not offered in the institutes in the target districts nor informally acquired
Business planning	Not offered in the institutes in the target districts nor informally acquired
New product development and marketing	Not offered in the institutes in the target districts nor informally acquired
NON-TECHNICAL SKILLS	
Negotiation skills	Not offered in the institutes in the target districts
Functional literacy and numeracy skills	Not offered in the institutes in the target districts
Time Management	Not offered in the institutes in the target districts



MAPPING CHALLENGES AND OPPORTUNITIES

4. MAPPING CHALLENGES AND OPPORTUNITIES

Variance in Skills Demand

The analysis from the market assessment study notes that the present market representing different segments of employers and self-employment opportunities is not homogenous and has distinct skills requirements. While there is some level of overlap in the non-technical skills across the segments, the functional skills required remain significantly industry and sector specific. This dimension is of particular relevance to the project while designing interventions to address the skills gap based on the market demand. There appears to be no common formula in designing training courses for the industry/ market in the selected districts as skills demand vary from segment to segment. Detailed suggestions to this end are presented in the recommendations section.

TEVTA Institutions - A Weak Link in the Chain?

An institutional assessment of the TVET sector reveals that at present the government managed TVET sector is characterized by; outdated curriculum, a mismatch between skills taught and those demanded by the industries, inadequate quality assurance mechanism, inadequate physical and learning resources and low participation of the private sector necessary to bridge the skills-market gap.

The institutions lack a culture in which training is driven by market based projections of future skill requirements. In addition, the report observes that the TVET system is not demand driven; attachments and linkages to industry are fragile, poorly planned and inadequately supervised. The challenge is further aggravated by poor quality of training resulting from lack of appropriate (qualitatively and quantitatively) tools and equipment and the inflexible curriculum followed in TEVTA institutions.

The institutional review notes that all the TEVTA institutions follow the government prescribed curriculum. In interviews with the research team, most of respondents representing the institutes' management said the training curriculum was not revised or updated frequently. The type and number of courses offered in the institutes have not changed over the years indicating a gap between market demand and course content. Most respondents were of the view that due to a disconnect with the market, the institutes had not been able to keep up with technological developments in the industry. As a result many of the courses offered had become redundant and outdated. The findings note that the menu of training courses follows a narrow spread focusing primarily on trade specific skills. Training courses on life skills, entrepreneurship development and business management skills are not part of the regular curriculum at the TEVTA institutes at present.

Moreover, the vocational education and training for women are presently limited to a narrow range of female-dominated fields that reinforce their traditional roles and responsibilities and gender stereotypes. Currently very few institutions offer anything outside this narrow range, thus, limiting the chances for most women to benefit from newer, non-traditional fields, such as information and communication technologies (ICT), office administration etc.

The skill-enterprise relationship is highly dependent on the delivery context of training. At present, however, the content of training is heavily theoretical based with little emphasis on practical learning. Industrial attachment is haphazard and uncoordinated hence most of the graduates have no grounding in modern technology. This leads to a mismatch between the training and the labour market requirements. For example in trades such as motor vehicle mechanics, graduates are trained in old engine models and are not able to handle the modern motor vehicles unless they undergo extra training at the workplace.

> *What will I learn there which can guarantee a job?"*
> FGD Respondent (Male) – Thatta

The findings note that in the TEVTA institutions at present, the employers/ market linkage is missing both in curriculum development and job placement. There is no mechanism in place at the institutes for collecting labour market information and utilizing it to guide course content or expansion of training programs. In interviews with the research team, few of the respondents representing the institutes' management reported to have an advisory/ oversight forum in place called the Institute Management Committee/ Board of Management with representation from the employers but said that these forums were mostly inactive. The analysis reveals that at present the engagement with employers in most of the TEVTA institutes is informal and individual-centric dependent on personal initiative of both the heads of institute and the employers.

> *We learnt stitching at home. Why should we go to a training center to learn what we already know.*
> Woman Respondent, Sajawal, Thatta

In assessing other linkages with the employers, the findings noted that none of the institutes visited had institutional

arrangements with the employers/ industry for internships or on-the-job training opportunities for their graduates. While in some of the institutes, positions for job placement officers had been created but they were yet to be filled. None of the institutes visited reported to organize job fairs for their graduates in order to facilitate job placements. The findings also indicate that at present, there is no structured/ institutionalized mechanism in place for providing career guidance to graduates in the TEVTA centers.

In exploring the reasons for low enrollment in formal training institutes among the target group, the findings note that these range from lack of information about the presence of TEVTA institutes in the areas to limited access due to less number of institutes in the selected villages. For many, however, the primary reason for not enrolling in the skills development programs, appears to be a low value associated with vocational/ training skills acquired through formal channels, particularly government institutions as the trainings offered are not considered to be based on marketable skills. In addition, it was also highlighted during the FGDs that the additional cost of transport and mobility was also considered a key impediment in accessing skills development programs as the institutes offering trainings were mostly situated in cities away from the villages. For women, in general, challenges related to mobility and family support were also prioritized as key impediments to participation in skill development programs. Most women respondents shared that travelling alone to and back to the TEVTAs situated away from their villages was impossible in most cases.

The findings note that women respondents in the urban centers appeared to be less inclined to enroll in skill development programs. The analysis reveals that while the socio-cultural challenges serve as a major disincentive to women's participation in the training programs, an equally compelling reason appears to be the relevance of the present training offerings for women. The present training options for women seem to be limited to conventional skills like stitching and tailoring which are not deemed as particularly market oriented or income generating skills. On the other hand, economic compulsions appear to override cultural constraints in the rural communities and women seem keen to pursue trainings and engage in income generating activities provided they get an opportunity. However, mobility, particularly travel outside the village, remains a key concern with most of the women respondents saying that they will not be permitted to travel outside their village to participate in a training program.

Trends in self-employment

The findings note that in across the seven target districts across the two provinces, women primarily and men in many cases, are engaged in self-employment. The pattern of work among women in the target districts appears to be home based. Analysis of the qualitative data (FGDs and Key Informant Interviews) reveals that most of these self-employed women operate from home usually as a single person business entity. Most of the self-employed women in Punjab districts are engaged in stitching and tailoring. They mostly receive work orders from neighbours, family and friends and work. Rates per mostly decided per piece and often vary in the absence of a pre-determined pricing strategy. Self-employed women in the FGDs reported that they did not earn a regular income from their home based work as it was sporadic.

In the target districts in Sindh, self-employed women were mostly engaged in hand embroidery work. Similar to the pattern in Punjab, work arrangements appear to be informal and unstructured with no direct link of the women home based workers with the market. Women in general work alone or engage other family members depending on the quantum of work. Work orders are mostly placed through middlemen who work on commission basis with the shops/ boutiques. The business intermediaries/ middlemen, in turn work with individuals or groups of individual producers on piece-rate basis. Echoing similar experience as their counterparts in Punjab, women respondents in Sindh districts also shared that their work did not guarantee a steady income. In most cases, it appeared to be completely dependent on the demand from the intermediary in the absence of a direct market linkage.

The general trend noted among most of the self-employed men in the target districts across the two provinces, appeared to be engagement with small establishments/ shops. In interviews and FGDs, the young men participants who reported to be engaged in self-business shared that they were running shops (grocery, mobile repair, motor

mechanic workshop etc.) together with an elder family member.

The analysis reveals that while mostly engaged in self-business, men and women in the target communities, there is very limited application of an entrepreneurship model or skill set to their work. For women, various factors underline this limited application of the entrepreneurship model. These include limited exposure and mobility, lack of access to business support services and social networks, social-cultural factors perpetuating gender stereotypes as well as lack of the requisite skill set. Similarly, for men in self-initiated income generating activities, lack of requisite entrepreneurship skills and capital appear to be the top most reasons limiting business growth and potential.

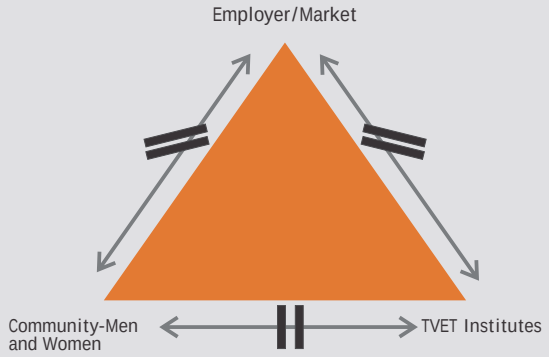
The analysis reveals that for most women in the target communities the current situation presents a paradox: on the one hand, a vast majority of women are engaged in self-managed home based work, which is yet informal and unstructured, but never the less a micro-enterprise model. On the other hand, there is no provision presently in their training (acquired mainly through informal channels i.e. learning from mentors at home) for learning about managing self-business. The demand for such trainings is also non-existent presently because of limited exposure and a disconnect with the market.

The Disconnect between the employers, communities and the TEVTAs

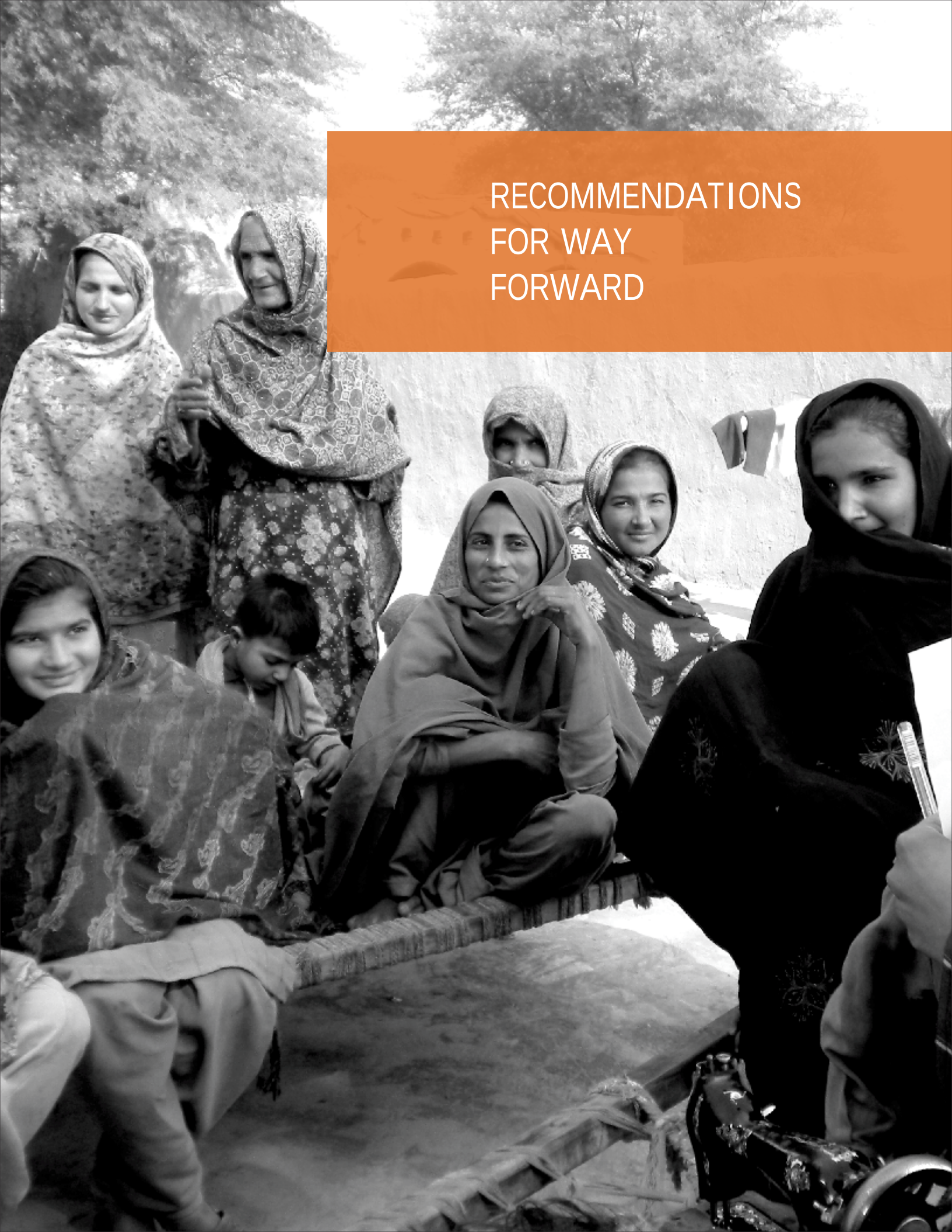
The study findings note that in sum, the three core pillars in the skill demand and supply context comprising of the industry/ employers, the communities and the TEVTA institutes are presently disconnected. The skill demand generated from the market/ employers is not matched by the present skill inventory present in the communities or developed by the TEVTA institutes. This disconnect has a direct impact on the expected employment outcomes which should result from interventions in skill enhancement and trainings.

As noted earlier, delink between market and training courses offered has resulted in suppressing the demand by men and women in the communities who do not see the relevance of trainings with the job market. Employers interviewed, on the other hand, were also of the opinion that in order to provide market driven skills, the TVET sector had a critical role to play as the intermediary between the communities and the market. This link can only be strengthened if TVET institutes ally closely with the industry, identify the market needs and update and expand the present training offerings.

Figure 4: DISCONNECT BETWEEN THE THREE PILLARS IN THE SKILL DEMAND AND SUPPLY CONTEXT



RECOMMENDATIONS FOR WAY FORWARD

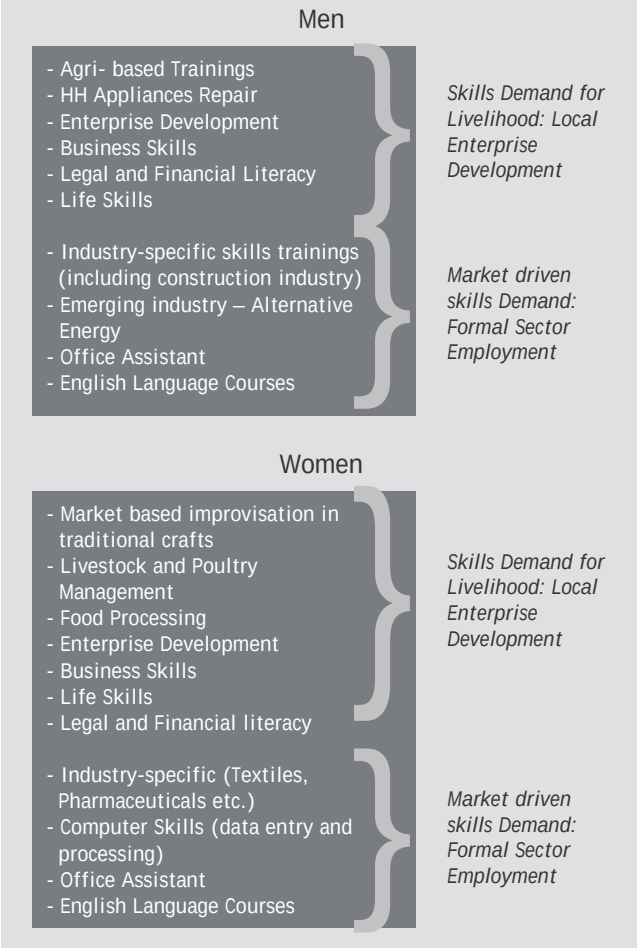


5. RECOMMENDATIONS FOR WAY FORWARD

This section presents key recommendations for strengthening the capacity building and skill training component of the project in order to maximize its impact.

1. The study findings note that at present the project has a wide geographical spread. Community dynamics, current skills inventory among the target group and market structure and potential vary, both across as well as intra-region. The project therefore, will need to stay clear of the 'One size fits all' strategy. Instead it will need to develop a mixed bag approach while developing training courses and skill development programs. The trainings will need to address both market driven skills demand as well as skills demand for livelihood. In addition, while developing training curricula, the project focus should be on matching present training needs of women and men in the target communities as well as taking into account the different kinds of local or indigenous knowledge and skills they have, and complementing them with up-to-date knowledge and technology where possible. A selection of potential skills training for men and women is presenting in the Figure 5 .

FIGURE 5
POTENTIAL SKILLS TRAININGS



2. In order to capture the unmet demand as well as to create demand-driven training programs, the project should advocate for and facilitate the development of prioritized courses. The findings note diversity in the implementation context as market/ industry are not homogenous requiring a customized approach to training course development. To maximize the project impact, it will be worthwhile for the project to consider modifying its present LFA indicators to identify fewer but most relevant courses taking into account the structure of the local economy, particularly the structure of the labour market and the local demography. Developing customized, relevant courses is also consistent with the idea of matching training to local labor market conditions, which is identified as a key challenge by the employers as well as the TEVTA institutes.

This is also particularly relevant in promoting women's participation in non-conventional skills trainings. Experience indicates that in the case of conventionally female occupations, increasing the technical level of training has the potential to improve women's productivity and the applicability of the training to labor market needs in such areas as office work and in sectors like textiles and health care. One innovative approach is what has been called the “stepwise” method of relating similarities in the occupational background and existing skills of participants with the skill needs in more productive sectors in order to identify possible new training areas. With this approach, training programs can identify and incorporate more technical skills into training curricula in more conventional areas. With respect to promoting women's inclusion in training for traditionally male occupations, one option is to offer “pre-training” courses to women in order to familiarize them with the basic concepts, terminology and tools of the specialized training.

3. It is evident from the study findings that there is a significant trend for self-employment compared to wage employment in the target districts. At present, the nature of self-employment is home based and primarily in the informal sector. While the informal sector has a lot of potential to create jobs, develop future entrepreneurs and to produce marketable products, it has consistently been underestimated. In the TEVTAs, this is evident from the lack of investment and focus towards training course which aim at developing and enhancing entrepreneurship potential. It is therefore, strongly recommended that a parallel stream of courses focusing on enterprise development and entrepreneurship skills training are introduced to harness the local self-employment potential.

4. Analysis of the present situation in the communities indicate that the foremost challenge for the projects might be to encourage the target group, particularly the women, to think entrepreneurially, analyzing their situation and identifying income-generating activities they might be able to take on successfully. A necessary pre-condition for the project to consider, therefore will be instilling an 'entrepreneurial' mindset among the target communities in order to ensure successful take-up of newly established enterprises.

5. It is worthwhile for the project to consider complementing the vocational and technical trainings with numeracy and literacy training for those community women who need it. Women, particularly the most disadvantaged, may also need training on gender issues and life skills, such as health and nutrition, confidence building, negotiation and leadership skills. In addition to technical skills, the project can consider including non-technical skills in the training programs to help men and women perform more effectively in the line of work. These skills can include effective workplace communication and interpersonal skills, conflict resolution, negotiation and time management.

6. In terms of the project design, the project may consider selecting a program strategy encompassing an integrated livelihood approach, simultaneously addressing multiple constraints including social, cultural and institutional factors which can limit the labor market participation of men and women in the target communities.

7. The study findings indicate mobility constraints as the biggest impediments to women's access to and participation in training and skills development programs.

It may be worthwhile for the project to consider innovate methodologies in the delivery mechanisms. The project may explore the possibility of bringing TVET services to villages by moving away from its present urban-centric focus. Skills development for women in the target communities may require a combination of training in formal settings (such as training institutions) and non-formal ones (such as community groups/ collective forums, learning from family and peers in local villages).

8. The findings indicate that the project will need to focus on a range of TEVTA specific priority interventions. These may include the following components:

a. Development/up-gradation Infrastructure and equipment
b. Updation of the present training content and curriculum
c. Trainings/refresher courses for Instructors/ Teachers
d. Development of market-driven short-term skills development training programs
e. Establishment of labour market and Industry linkage
f. Creating opportunities for workplace learning

As noted in the earlier sections, it is essential for TEVTA institutions to establish partnerships with business, commerce and industry to ensure internships and work placements for students of the sector. Such experiential learning should be a central and integral part of the curriculum. Such placements should be well organized and continuously monitored and evaluated. Additionally, purposeful linkages should be established between the industry and the training institutions especially in development of curriculum and attachment. In order to ensure the relevance of the trainings offered, it is also critical to strengthen the TEVTAs capacity for carrying out market research and skills gap analysis on a continuous basis.

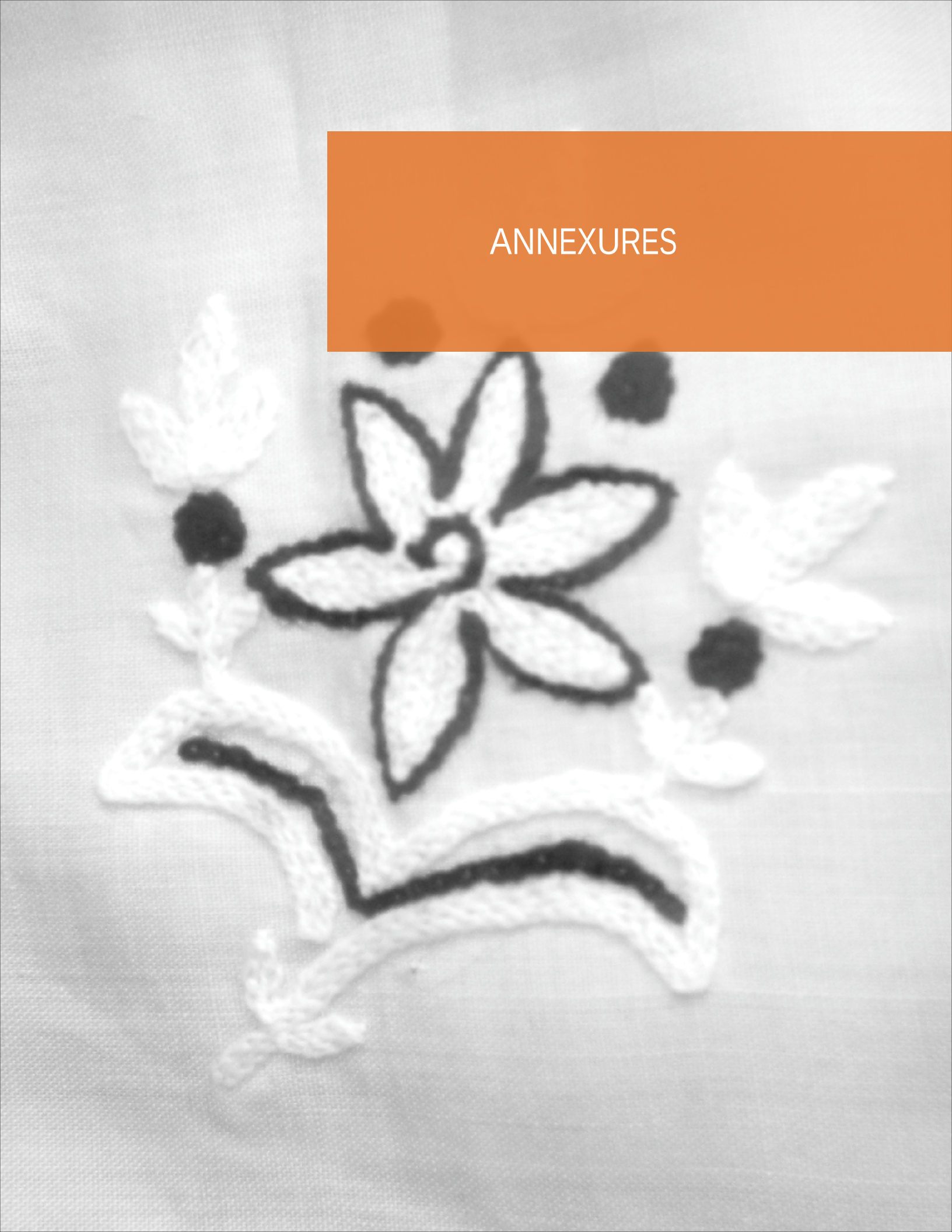
9. In order to ensure sustainability of interventions aimed at economic empowerment of women in the target communities, the project may consider extending the scope of trainings to include provision of post-training services such as access to credit or savings programs, business development services, training in product design and marketing, and developing linkages to new markets.

10. In order to strengthen linkages with the industry, the project can consider engaging diverse stakeholders and leveraging support of joint platforms like the Chambers of Commerce and Industry in the target districts. The Chambers can provide an important institutional access point to reach out to the local industry for job placement, apprenticeship and industrial attachments for the TEVTA graduates. Other relevant programs, particularly, the Provincial Department of Labour's apprenticeship program as well as other private sector initiatives can also be leveraged and linked with the TVET institutes for creating placement opportunities for the graduates.

11. On the basis of the study findings, the project may consider extending its preparatory phase to carry out a rigorous outreach activity in the target districts for orientation on skills trainings as well for mobilizing community support for the project. The awareness raising activity among the women, their families, communities, and training institutions can encompass a range of issues from an orientation on the benefit of trainings women, to garnering support for training in nontraditional trades, and in using new technologies/ approaches etc.

12. A review of good practices in empowering rural women reveals that formation of locally based groups and networks can lead to informal learning of skills and provide the collective power that may be required to reach new markets. The project, therefore, may focus on developing locally based business groups/ networks of women in the target community. The creation of such groups not only gives them an opportunity to expand their work by benefiting from economies of scale but also leads to strengthening the collective bargaining power of the local women entrepreneurs.

ANNEXURES



ANNEXURES

ANNEXURE A: TERMS OF REFERENCE

1. Project information:

Project Name: Enhancing socio-economic development through investing in human capital in Punjab and Sindh

Overall Objective: To improve the relevance, quality, access and equity of technical and Vocational Education and Training (TVET) services for the women and youth in rural areas of Southern Punjab and Sindh

Specific Objective: To Increase access of Rural Women and Youth to income generation opportunities through innovative TVET approaches

2. Background and Purpose of assignment:

CARE International is seeking services of a consultant/ consultancy firm for an institutional contract for conducting baseline survey in 3 districts of Sindh and 4 districts of Punjab. The project seeks to improve the TVET sector by working on relevance, quality, access and equity of TVET services predominantly for the deprived communities, and exclusively focuses on rural women and youth in Sindh and Southern Punjab. This will be done by designing, and implementing demand driven training programmes, using innovative approaches and new teaching and learning methodologies, and improved linkages between TVET graduates and labour market service providers for job counselling, job placement and facilitation for self-employment including access to micro-credit services.

The project aims to redress the stereotyping that exists at the level of family and school by encouraging both boys and girls to go for "non-traditional" activities through skill development streams introduced at secondary school level1. The transition from school to the labour market in Pakistan is not smooth; the youth unemployment rate is higher than the adult unemployment rate; many young people work in the informal sector as unpaid family workers, casual wage workers; and female youth are in worse shape than their male counterparts on various employment dimensions2. However with indicators improving since measured in 1999, in 2007 women's wage work participation shows demonstrable connection to education from about 8 years of education onwards, suggesting some loosening of cultural norms. Also, the proportion of women with 10 or more years of education has risen over time to 18 per cent in 2007, suggesting that a larger number of women are now able to take advantage of the labour-market benefits of education. While education plays an increasingly important (though still relatively small) role in occupational attainment for women, cognitive skills are found to have substantially high payoffs. Therefore CARE aims at strengthening TVET institutes through building trainees soft skills through life skills training.

Overall, the intervention is proposed to be implemented in seven districts involving 38 Union Coucils (UCs). In South Punjab 20 UCs of district Multan, Muzaffargarh, Vehari, Rajanpur will be targeted while in Sindh 18 UCs of district Tando Allahyar, Thatta and , Mirpur Khas will be part of the intervention. The project will target rural women and youth (15-29 years) belonging to poor, marginalized and vulnerable communities, and work with TVET, private sector, government and civil society organizations to enhance their employability and income generation skills and opportunities.

The key elements of the project implementation strategy include:

- Private Sector Led Training Design and Delivery: CARE and partners, in coordination with TVET providers will work with the private sector and industry to explore the skills gaps and market demands, and facilitate the designing/improvement of TVET training curricula that is need based and in line with the requirements of the local industry.
- Partner Focused Implementation: CARE will focus on project implementation through local partners. The targeted technical input and support from CARE will build the capacity of these partners to overcome shortcomings of past projects.
- Strong Commitment to Gender Equity Approaches: As evidenced by their core programming documents, public web-sites and program implementation, CARE and its partners have long-standing commitments to gender equity programming.
- Innovation in Implementation: The project components exemplify CARE's approach to creative and pragmatic implementation based on relevant experience in South Asia.

The survey will collect baseline data to guide project's implementation and monitoring, and the survey findings should be able to inform project benchmark setting in order to effectively achieve project targets. The survey will identify marketable skills, technical and vocational training needs of rural women and youth, barriers, challenges and opportunities regarding youth and women's employability and self-employment in the seven target districts. The survey should also be able to provide a geographical profile of prevailing cottage industries in the target districts, an analysis of the household income level highlighting the sources of earning and profile of earning members. The survey will also measure the presence and involvement of private sector for improving the economic status of rural women and youth in the target districts and opportunities for collaboration. The study will be carried out in consultation and close coordination with local community, government, semi-government and/or private TVET institutes, and findings will be shared with relevant stakeholders through dissemination of baseline report. The report will also be used as a guiding tool for the project's Monitoring activities and mid & end of term evaluation surveys.

3. Scope of assignment

The assignment will highlight two strands of studies, which are: (a) a baseline survey and (b) a market assessment and skills gap analysis. The field work for both studies will be executed at a stretch while reporting for both studies will be done separately.

The main objectives of the studies are:

(a) For Baseline survey

- To assess household income level of the target communities highlighting the sources of earning and age group of earning members;
- To assess technical and vocational training needs of rural women and youth and accessibility (including affordability and impeding factors) to the existing training opportunities (private and public);
- To assess barriers, challenges and opportunities regarding youth and women's technical training, employability and self-employment;
- To map the presence of Government and Private technical and vocational education and training bodies in the target districts, its accessibility by rural women and youth and the training services offered;
- To assess the nature and extent of presence of for-profit private sector organizations/ businesses in the target districts and identify opportunities for medium and large scale employment and collaboration;
- To assess the willingness of schools to standardize vocational skills curricula as part of secondary school

syllabus and explore the required process in order to do the same;

- To collect data on the nature of involvement of other civil society and/or government organizations towards improving economic status of rural women and youth in the target districts;
- Recommendations (from stakeholders and field survey analysis) to minimize the identified barriers and constraints, especially with respect to employability and self-employment (micro-entrepreneurship) of target women and youth.

(b) Market assessment and Skills gap analysis

- To assess the skills in demand by employers, industry, small and large businesses and especially by the Private sector and explore their current recruitment processes;
- To assess the level of education, skills and expertise (background) of current employers in industry and private sector;
- To explore the type of skills employers prefer in young boys and girls aged 16-18 in order to offer them employment;
- To explore with old TEVTA graduates, currently employed or unemployed, the technical and vocational skills TEVTA institutes should offer to compete with market demands;
- To analyze the type and number of employers reaching out to TEVTA in the past seven years' explore reasons for change;
- To collect information from TEVTA instructors regarding gaps in the existing TEVTA curricula and recommendations form improvement (for instance, type and duration of skills);
- To reach out to management of Private Sector organizations and explore basic modalities for collaboration in this project aiming to enhance the economic activity of the project target beneficiaries;
- To assess marketable skills rural women and youth possess and identify areas for improvement with respect to market demands;
- To assess the willingness and/or reservations of employers/ businesses in giving business/employment to rural women in the project target communities.

Geographical Locations

Multan, Muzaffargarh, Vehari, Rajanpur (Punjab) and District Tando Allahyar, Thatta and , Mirpur Khas (Sindh),

5. Major Tasks and Coordination

The major processes in conducting the survey will include:

- Complete literature review (essentially include but not limiting to project documents provided by CARE, similar studies done by other organizations working in same areas), based on which the survey design will be finalised. The survey design, study tools and reporting format should be agreed on before the field work.
- Coordinating with CARE focal person in preparation and planning of survey indicators, study tools/ data collecting instruments, sampling strategy, plan for data analysis and the implementation of the survey.
- Training of field teams (arranged by consultant/consultancy firm) for data collection, on format agreed by CIP focal person.
- Regular coordination with the focal person (Project Manager TVET) and ensure the feedback of technical advisory team (Project Manager TVET, M&E Advisor CARE Pakistan, Entrepreneurship Development Advisor and Programme Development Coordinator, CARE UK) is incorporated.
- Ensuring that high quality survey standards and harmonised, globally endorsed methodologies are applied to complete the survey. It is therefore important to share all relevant information in time, including

information on the survey methodology, the statistical information, the sample size calculation, the listing exercise (including list of people interviewed/ approached), questionnaire design, the training reports, the field data collection report, the preliminary analysis, the draft and final analysis, and reports and the data base.

- Ensure high quality Gender segregated data collection from the field through field supervision and monitoring, its analysis and final report; especially analysing study areas through a gender lens.

The Responsibilities of Consultant/ Consultancy firm and Key deliverables:

a. Finalization of survey proposal

b. Presenting the study design to technical team and incorporate comments to finalize survey proposal and questionnaire

c. Field work: arrange and train field teams on mutually agreed format, start and complete survey implementation based on agreed survey work plan with time lines, survey concept and methodology.

d. Agree on template to present results and template to prepare final report\

e. Data entry, analysis and preparation of draft and final report

f. Submission of final report as well as all data sets.

All collected data using various tools should be submitted in both soft and hard form (tabulated). Submit 2 printed hard copies of all the documents as well as 2 CD ROMs.

g. Brief note on field data collection from each village attached to the data sets (one page document on mutually agreed format)

h. Presentation to the Technical team highlighting major learning, gaps and recommendations for project implementation.

<u>Submission of Technical proposal by Consultants/ Consultancy firms (content, process and deadlines):</u>

Proposal of the assignment must contain the following details:

- Results of the Literature review.
- Survey concept with two separate strands for Baseline and Market assessment: including study design and methodology for the quantitative and qualitative components, software programs, and use of indices and cut off points etc.
- Explanation around how the baseline and market assessment results will be used as reference to inform project's Monitoring and Evaluation systems and procedures.
- Sample definition, statistical sample size calculations, justifications and selection procedure (survey sample) for both baseline and market assessment.
- Work-plan: this should include details and time frame for activities for assignment implementation from start to completion of the both studies; including time for literature review, writing of study concept, drafting and refining the questionnaire, training of field teams, fieldwork, data entry and analysis; drafting, acquiring feedback from technical team and finalizing report and presentation of the findings to the technical advisory team.
- Draft questionnaire for qualitative as well as quantitative survey components.
- Budget sheet with breakdown of budget per activity.

ANNEXURE B: LIST OF TVET INSTITUTES VISITED

Punjab

S#	Institute
1	Govt. Vocational training Institute for women, Kot Adu
2	Govt. Technical Training Center for men, Kot Adu
3	Govt. Technical Training Center for men, Rajan Pur
4	Govt. college technology for women, Multan
5	Govt. Vocational and training Institute for women, Multan Old
6	Blue Pottery development Institute, Multan
7	Govt. Technical Training Institute, Vehari
8	Govt. Vocational training Institute, Daniwal Vehari
9	Punjab Vocational Training Institute, Fazilpur
10	Govt. Vocational training Institute for women, Rajanpur
11	Govt. Vocational Technical Institute for women Chowk Sarwar Shaheed, Muzaffar Garh
12	Govt. technical training Institute, Daulat gate Multan
13	Punjab Vocational Training Institute, Vehari

Sindh

14	Govt. Mono Technical Institute
15	Govt. Institute of Business and Commerce Education
16	Govt. Vocational School for Girls
17	Govt. Polytechnical institute Thatta
18	Govt. Vocational School for Girls
19	VTC for girls
20	VTC Sajawal
21	Govt. Vocational Institute
22	Govt. Vocational Training Center for boys
23	Govt. Vocational School for Girls

ANNEXURE C: LIST OF EMPLOYERS

Punjab

S#	Industry/ Employer
1	Indus Sugar Mill, Rajanpur
2	Ahmad Traders (Ginning Factory), Rajanpur
3	Sanat Zar, Multan
4	Allah Din Group of Industries, Multan
5	Aljahan Flour Mills, Multan
6	Al-Faisal Shoes & Khussa store, Multan
7	Fatima Zari House, Multan
8	Kharkana hand Embriodery, Hussain Agahi Multan (02 karkhanas visited)
9	Ali Raza industries, Royal Star Motor bikes, Multan
10	Gota Kinari Looms (03 looms visited in the same locality)
11	Power looms (05 looms visited in the same locality)
12	Ahmed Fine Textile, Multan
13	Mughais Textile and Garments Mill
14	Maqbool Textile Mill
15	Coninpex (Contractor & Importer)
16	Hafeez Ghee and General Mills (Pvt) Ltd
17	Al Rehman Enterprises, Muzaffargarh
18	Al-Sadat Traders, Vehari
19	Nestle Milk Collection Regional Office
20	Multan Chamber of Commerce

Sindh

21	Turab Ali Khoja (SVP-Hyderabad Chamber of Commerce) -
22	Sikander Ali Dhandoori (Chairman Hyderabad Chamber of Commerce) - Hyderabad Tiles
23	Abdul Qayyum Busrat (co-chairman L&O Chamber of Commerce) Ginning factory
24	Fateh Textile Mills
25	Popular Food Industry
26	Mehran Suger Mills Ltd
27	Indus Jute Mills Limited
28	Hala Handicrafts Thatta
29	Thatta Cement Company Ltd.

ANNEXURE C: LIST OF EMPLOYERS (contd...)

30 Al Abbas Suger Mills Ltd
31 Amreli Steel Mills Ltd
32 Mirupur Khas Chamber of Commerce And Industry
33 Asif General Store Thatta
34 Marvi Garments
35 Ali Boutique
36 Mem Jee Collection
37 Unique Handicrafts
38 Madani Hala Handicrafts
39 Nadeem Handicrafts
40 Abdul Hameed Handicrafts
41 Khaadi
42 Junaid Jamshed