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# USAID/PAKISTAN: TRADE BRIEFING PAPER: INDUSTRIAL ESTATE SELECTION FOR BUSINESS PLAN ASSISTANCE

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# ACRONYMS

CFTC	Common Training & Facility Centers
EPZ	Export Processing Zone
FDI	Foreign Direct Investment
GOP	Government of Pakistan
IE	Industrial Estate
MCR	Marble City, Risalpur
MoI&P	Ministry of Industries and Production
NWFP	North West Frontier Province
PASDEC	Pakistan Stone Development Company
PIDC	Pakistan Industrial Development Corporation
PPP	Public Private Partnership
PTP	Pakistan Trade Project
R&D	Research & Development
SDA	Sarhad Development Authority
SEZ	Special Economic Zone
SME	Small & Medium Enterprise
USAID	United States Agency for International Development

# 1. INTRODUCTION

Special Economic Zones (including Industrial Estates, Export Processing Zones) world-wide accounts for an increasing share of international trade flows and employ growing number of workers world-wide. In the global economy, SEZs are acknowledged to be by a significant tool to increased foreign exchange earnings, employment generation, enhanced workforce capital and an attractor of foreign direct investment (FDI) inflows. Research on the impact of effective SEZs also suggests significant indirect economic benefits: indirect employment generation, investment, skill and technology spillovers.

Pakistan understood the potential of economic zones for regional development and industrialization as early as 1947 when it set up its first industrial estate. Since then the Government of Pakistan has established several industrial estates in every province in the country. Until recently, Industrial estates have been a public sector endeavor in Pakistan and have yet to unleash the potential economic and social benefits that more successful models across the world have demonstrated.

The USAID Pakistan Trade Project (PTP) is a four year project (2009-2013) designed to focus and harness the power of international trade as an engine for sustainable economic growth and stability in Pakistan. Through targeted technical assistance, this USAID-funded program supports the Government of Pakistan and private sector stakeholders to improve the trade environment through effective trade policy implementation; enhanced capacity, procedures and systems of Pakistan's institutions to increase regional trade, especially through across Pakistan's borders; and building the capacity of Pakistan's private and public sector institutions to develop and manage sustainable and competitive special economic zones.

Successful enhancement of some of the existing industrial estates could potentially harness the natural sources of competitiveness of some of the least developed yet potentially strategic areas in the northern and western borders of Pakistan.

This paper aims to synthesize the thinking from the SWOT analysis (available separately as background papers) of the selected industrial estates in NWFP and Baluchistan to prioritize USAID/PTP assistance for the rehabilitation of existing industrial estate/s into a competitive and sustainable economic zone.

As mentioned in the problem statement the goal is to fairly determine which sites would be the best candidates for either rehabilitation or Greenfield assistance. The terms and conditions of the assistance will be determined by a number of factors. This brief explores the key inputs and signposts used in the decision making process.

It must be mentioned that the PTP team should be engaged as key stakeholders throughout the process of estate evaluation, selection, feasibility and business planning as well as the critical component of implementation of the targeted assistance. This oversight role will provide USAID with the maximum impact within the most effective coordination of all current program areas.

It must be mentioned here that the implementation of a business plan for a special economic zone tantamount to a the implementation of an entity itself as opposed to implementation of specific tasks

of the implementation plan (such as infrastructure development, management structure establishment, operational procedures definition ..Etc). Therefore, for maximum impact and effective coordination, USAID would need one partner to be engaged as key stakeholder throughout the process of estate evaluation, selection, feasibility and business planning as well as the critical component of implementation of the targeted assistance.

# 2. INDUSTRIAL SITE SELECTION FOR FURTHER ASSISTANCE

The PTP Trade team visited and collected current status data key and held meetings with key stakeholders of existing industrial estates in NWFP and Baluchistan as part of a due diligence process over a number of months. The outcomes of the investigations were aligned with the objectives of the PTP team and the goal of how best to engage once a decision is made.

## 2.1. PROBLEM STATEMENT

Analysis and preliminary due diligence was carried out by the Pakistan Trade Project team in order to fairly determine which sites would be the best candidates for either rehabilitation or Greenfield assistance. The terms and conditions of the assistance will be determined by a number of factors. This brief explores the key inputs and signposts used in the decision making process and how to highlight key differentiators within industrial estates and their specific segments. All of the analysis is against the stated objective of maximizing the impact of the assistance and support against the efficient use of project human and capital resources.

## 2.2. EVALUATION OF VISITED SITE OPTIONS

PTP assessed the Marble City Risalpur, Risalpur Industrial Estate and Export Processing Zones, Gadoon Amazai Industrial Estate and Hattar Industrial Estate from NWFP. From Baluchistan, PTP assessed the Quetta Industrial Estate as a potential candidate for USAID/PTP assistance for business planning support for zone rehabilitation. PTP based its assessments on the following factors that are considered to be the minimum required for a basic functioning industrial estate and potential economic zone. It should be noted that all headline components inter-relate and rely on each other for effective outcomes.

- **Management Structure** – Functioning and with sufficient suitable skill and available resources to complete their mandate. Balanced participation of public and private sector on board to assist in key areas such as skill acquisition, budgeting and reporting, marketing and communications, risk management and investment attraction. The governance component fits into this broad heading.
- **Hard Infrastructure** – A vital component of any well functioning industrial estate or zone is foundation infrastructure. Access to functioning power, water and waste treatment and recycling, and telecommunications. Trunk infrastructure is often coordinated through various public sector funding and oversight organizations.
- **Services** – Consideration or the set up of recruitment center, training facility or services, medical clinic or small hospital (public or private), chemist or medical dispensary, common-use canteen or mess, and exercise or recreation facility.
- **Access** – Access to raw materials, access to markets, access to diversified labor and access to capital and capital markets need to be evaluated when considering short to medium term interventions.

- **Land Use Planning** – Sufficient forethought into estate planning and staging options, buffer zones, access and egress road plan and planned upgrades and internal road widening. Heavy haulage access for trucks and B-Doubles is a significant consideration, as the timely and efficient flow of product from these industrial centers is vital. Proximity to functioning rail access is another major consideration, and sits within the hard infrastructure component as well.
- **Value Addition and Shared Services** – Consideration and the ability to further develop such things as design and innovation centre, incubator facility, laboratory, testing and certification facilities, shared specialist machinery and equipment centre, shared warehouse and inventory facility.

The conclusions of PTP’s assessment of each of the above mentioned industrial estate / zone is synthesized below.

### 2.2.1. MARBLE CITY RISALPUR (NWFP)

The marble and granite sector is an emerging sector with apparent huge potential for growth. The strength of this sector is the significant reserve of different high quality varieties. The aim is to transform this traditional sector into a modern, globally competitive and knowledge based industry. Marble City Risalpur (MCR) is a step in a direction which will engage and mobilize the private sector towards workforce skills enhancement, adoption of efficient technology, research and product development for international market acceptability.

This benchmark city has the potential for substantial socio-political and economic impact that would arise from a replicable model for sector specific economic zone that demonstrates efficient pooling of resources to overcome traditional constraints such as unreliable electricity, lack of funds or scale to invest in R&D infrastructure, weak promotion of the sector...Etc.

Marble City Risalpur is proposed to offer an enabling world class business environment with modern infrastructure and support services to the tenants that could attract foreign direct investment in the sector once set up. It is estimated that around 6,000 direct and another 18,000 indirect workers will be employed by MCR. Simultaneously, construction related industries will also develop in the adjacent areas which can employ more people. This could settle to some extent the issue of unemployment in NWFP.

Although MCR is still an “unproven” model, it has a very aggressive and vibrant team and board of directors leading the vision. Pakistan Stone Development Company is the managing body of MCR and is headed by a private sector professional.

While PASDEC’s financial plan for the execution of the MCR Plan covers primarily the infrastructure and estate management. It is currently exploring venues to fund and execute some of the key shared facilities geared towards increasing R&D, workforce skill enhancement, trade facilitation and enhancement of value added within the cluster. Based on PTP’s discussion with the PASDEC, assistance may include components of the following:

- Advisory support from PTP to assist PASDEC in planning and staging processes and requirements
- Assistance with the Machinery Pool for use in model quarries
- Assistance with the establishment of the Common Facility & Training Center (CFTC)
- Mosaic, Handicraft and Inlay Development Center
- Training Institute and Technical Center
- Laboratory for testing of Marble & Granite
- Participation in International Trade Fairs & sending delegations for marketing and promoting the Marble & Granite Products in the major marble & granite markets of world

### **2.2.2. ECONOMIC PROCESSING ZONE/NOWSHERA INDUSTRIAL ESTATE RISALPUR (NWFP)**

Overall, the strong government influence within the EPZA Risalpur and weak private investment climate at the estate implies high investment and longer payback time. The EPZA's proximity to key road and rail infrastructure and comparative security in the region of Risalpur in EPZA, however could minimize the managerial and financial assistance required to turn around the Zone if private investment climate shifts for the better – as it may in case of the passage of the Reconstruction Opportunity Zone, or if the adjacent Marble City Risalpur attracts export oriented processes.

One of the key factors to success will be an active backing by the provincial and federal government to revive the Estate. If a coordinated and mutually agreeable new governance structure cannot be determined to the satisfaction of all, the payback time in terms of the impact from the initial investment (of time, effort and money) could take some time.

If the due diligence is considered of value, then a number of steps will be followed to exhaust the possibilities for a rejuvenated EZPA. These include:

1. Determining the type of relationship with other Greenfield sites such as Marble City (PASDEC)
2. A full feasibility on the staging of infrastructure upgrades in line with demand analysis from new firms and industries as they enter the estate
3. A plan to secure all types of labor (skilled and unskilled) and across various specialties
4. A new integrated Master Plan to include: banking facilities, commercial services to businesses, Internet and other telecommunications, training centers, child care facilities, truck and trailer parking zones
5. A review of the type of board of directors operating within an autonomous and independent incorporated association with an appropriate constitution
6. A review of all trunk and servicing infrastructure and cost/benefit analysis of staged development against expected demand for new plots within the EPZ

### **2.2.3. HATTAR INDUSTRIAL ESTATE (NWFP)**

The potential socio-political and economic impact of a successful rehabilitation of Hattar Industrial Estate (HIE) can be significant as this used to provide employment to a significant proportion of population, but due to the lack of incentives, non-competitive environment, economic slowdown and other factor more than 100 units have closed down, and unemployment has surged. If this trend prevails more units are expected to face the same fate. The absence of an active support by the provincial and federal government to revive the Estate, may lead to further deterioration.

Rehabilitation of HIE where below mentioned facilities are present can turn the estate into a more attractive entity for local and foreign investors alike;

- a) supply of electricity is guaranteed,
- b) supply of natural gas is provided,
- c) access to the markets and ports is improved,
- d) basic infrastructure is rehabilitated, and common facilities are developed, and
- e) a responsive governance structure is installed

There is a potential that if all the above-mentioned facilities are provided it can absorb a significant portion of the workforce. The PCEZ is an important development, which can accommodate a large percentage of workforce, so proactive steps have to be taken to prepare the workforce to harness that opportunity.

The current physical, economic, and governance infrastructure is not geared toward turning around this estate into a most attractive place for investors. The financial support of the provincial government is required to meet the economic constraint, and a more proactive and financially autonomous governance structure is required to oversee the operation & maintenance of the estate.

The rehabilitation of HIE needs political commitment, financial and human resources, attitudinal change, revamping management practices, and above all time, as the change cannot be affected in a short term. However steps needs to be taken immediately, so that their result can materialize in foreseeable future. Following interventions can help in making HIE a more attractive place for new and current investors:

1. Improved access to trunk roads; GT Road, and Motorways M-1
2. Steady and uninterrupted supply of electricity for the industrial estate
3. Develop the technical and human capacity of the SDA project office which manage HIE
4. Making the Industrial Estate Management Committee more proactive so the collective actions can be taken at their own with internally generated resources.

#### **2.2.4. GADOON-AMAZAI INDUSTRIAL ESTATE (NWFP)**

A rehabilitated Gadoon Amazai Industrial estate could harness the potential of efficient cross border trading routes from Pakistan to Afghanistan and Central Asia over time. USAID was the pioneer in the formation of this estate, and allocated significant seed funds in 1985 to combat the illicit poppy trade.

The site is located at a distance of 68 kilometers from the motorway near Burhan. In order to mitigate this effect, the approach road needs to be designed to allow heavy trailer access. The other drawback is the non availability of a railway line to the site.

The Sarhad Development Authority (SDA) manages the estate. The SDA appears to be weak in the following areas:

- Planning and engineering skills and the ability to design and supervise engineering and planning
- Exercising strict building control
- Lack of computerized data
- A need to train the engineering, planning and managerial staff in their respective disciplines
- Lack of discretionary powers to enhance the maintenance and development charges and to spend on maintenance of infrastructure

The following inhibitors are highlighted to show that remedial activity may take some time as they are structural in nature:

- No underground sewerage system – the open drains are often choked up and are a source of pollution
- There is no system for the pre-treatment of effluent from each industrial unit. The provision of a waste water treatment plant would avoid waste disposal into nearby fields and avoid environmental degradation
- There is no facility for the training of unskilled workers
- There is no marketing information system to guide the investors to export their products.
- There is no boundary wall – this addition would give investors a greater feeling of a controlled and secure environment
- The withdrawal of concessions saw an exodus of investors and speculators. A new round of certain concessions and incentives caused the SDA to add an additional 916 acres

Listed below are some positive elements of the current Gadoon-Amazai Estate:

- An abundant unskilled work force is available - if trained properly these workers could potentially fill the void left by the skilled workers who left seeking higher wages in Punjab
- The significant natural resource of the Tarbela Lake is nearby – and an abundance of water is available without significant costs of transportation
- Significant land availability - Half of the plots are available for allotment to new investors in addition to an abundance of land available for extension at competitive rates
- Good availability of worker accommodation - There are 150 two-room houses already allocated to workers. A further 1152 apartments are under construction.
- Proximity to education and hospital facilities – There is an English Grammar School and a co-educational Primary school. The 25-bed hospital offers x-ray, lab testing , an operating theatre, women’s treatment and operating room and no cost ambulance services for workers.
- Abundant Electricity - Tarbela grid station meets the electricity demands of the area well. Pehur Power plant can also provide electricity to the tenants.

### **2.2.5. QUETTA INDUSTRIAL ESTATE (BALUCHISTAN)**

The potential socio-political and economic impact of a successful rehabilitation of QITE can be significant. However, in the absence of an active backing by the provincial and federal government to revise the Estate, the payback time in terms of the impact from the initial investment (of time, effort and money) could run into several years.

A rehabilitated QITE, that would offer an enabling business environment, could harness the potential of efficient cross border trading routes from Pakistan to Central Asia through Afghanistan more effectively. A secure and enabling business environment could also attract additional and foreign direct investment based on rich natural resources of the region (copper, coal, gold etc). Increased economic activity, and thus greater employment, especially amongst the Baluch population could settle to some extent the political unrest arising from feeling of economic marginalization of the Baluch population.

QITE, however is a public sector entity and currently without an autonomous body to develop some scope for allocation of financial resources for its development and maintenance. The existing physical, economic and governance infrastructure is significantly weak and would require a government support and will form the onset to turn the Estate around into a viable and competitive industrial estate.

While the rehabilitation of QITE would require physical, organizational and operational re-engineering over a medium term, some immediate steps that may improve QITE condition in the short term include:

- Creation of an autonomous authority (not for profit incorporated) to be governed by a elected Board of Directors (e.g. Lasbella Industrial Estate Development Authority LIEDA).
- Construction of a quality boundary wall around the Estate
- Establishment of an electricity back up supply for continuous, uninterrupted operations in QITE.

# RECOMMENDATIONS

The PTP believes that all estates, sites and existing management structures can be worked with to achieve certain outcomes. However, based on a composite set of criteria around greatest sustainable impact for given resources (Please see Table 1 for the criteria and scoring for prioritization of industrial estates for business plan assistance) the Marble City Risalpur emerges as the clear winner as it appeals to all of the objectives required by PTP to fulfill the scope of our work. The Risalpur industrial area in general, and more specifically the Export Processing Zone and Nowshera Industrial Estate also rank highly but primarily in scenario that it share some of the strengths and potential benefits of their neighboring Marble City. Quetta Industrial Estate is also of interest, as it has the strongest possibility of delivering socio-political returns despite obvious shortcomings in terms of level of project commitment and the ability to stay the course as greater investment needs are identified. The remaining sites, while having certain good qualities, do not have the overall delivery prospects required by our input/indicators.

**Table 1: Ranking of Selected Industrial Estates**

Indicators	Marble City	Risalpur	Hattar	Gadoon	Quetta
Potential Socio-Political Returns	7	4	5.5	7.25	9
Quick Wins, can we see results	8.5	5.5	4.5	3.5	4
Least/Minimum Investment Required	8.5	7.5	4.5	3.5	3.5
Less Dependence on Public Sector	8.5	2.5	3.5	3.5	2.5
Natural Competitiveness	9	4.5	5.5	4.5	7
Management	8.5	5.5	5.5	5.5	4.5
<b>Total</b>	<b>41.50</b>	<b>29.50</b>	<b>29.00</b>	<b>27.75</b>	<b>30.50</b>
<b>Rank</b>	<b>1</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>2</b>

The prioritization list below highlights the key factors determining the ranking of the respective zones:

**1. Marble City Risalpur (NWFP)**

- a. The MCR is in the process of being established, this allows for an opportunity to provide effective role in the implementation or adjustment of the plan for improved sustainability
- b. MCR is based on natural competitiveness: proximity to marble sources and to natural but informal marble processing cluster in Risalpur and Nawshera. This lends to the sustainability of the zone itself
- c. The MCR management (PASDEC) has demonstrated through the MCR Plan and vision their understanding of the route that needs to be taken to attain global competitiveness. This ensures a workable PTP and PASDEC partnership in the development and execution of focused technical assistance.
- d. PASDEC requires focused assistance with respect to a portion of MCR which relates to the shared facilities within the cluster geared towards improving cluster

productivity and quality of output. This would allow PTP to focus limited resources to smaller but significant portion of the zone implementation plan that could demonstrate quick impact in terms of improving cluster competitiveness.

- e. There is a unique situation in this option where the main body PASDEC is looking for interventions it is able to control.

**2. Quetta Industrial Estate (Baluchistan)**

- a. The strategic nature of the intervention supporting rehabilitation of the Quetta Industrial Estate cannot be understated. Support to Quetta Industrial Estate fits with the overall PTP efforts for improved transit across the Chaman Border to Afghanistan for increased trade across the borders.
- b. The socio-political impact of an enabling business environment in an economic zone in Quetta – and that too the less developed Baluch area – could be huge. Marginal direct and indirect benefits in terms of employment creation, injection of investment could be seen by the provincial and the Federal Government to be significant enough to amass the political will and financial resources to back the development of the Zone.
- c. Current potential for harnessing the site’s locational advantage for cross border trade is already being demonstrated by export oriented businesses that have recently been set up in the zone despite lack of minimal infrastructure provided by the site, and often by investing in the infrastructure privately.
- d. Because of its near Greenfield conditions and safety/security concerns, this site will require significant is in critical need of some form of assistance. Federal and Provincial Government assistance needs to be measured and agreed upon, but the strategic nature of the intervention cannot be understated.

**3. Export Processing Zone/Nowshera Industrial Estate (NWFP)**

- a. This is basically a Greenfield site and is likely to emerge a winner in the medium run if the adjacent Marble City estate is assisted. The aggressive market estimations from PASDEC for expansion may well assist the strategic position and leverage of this estate. Therefore, direct engagement with other estates and initiatives rate higher.

**4. Hattar Industrial Estate (NWFP)**

- a. This estate is strategically located near major infrastructure, and is home to exemplary export businesses with high employment numbers.

**5. Gadoon-Amazai Industrial Estate (NWFP)**

- a. Similar in nature to the Hattar IE, this estate has strong basic elements, but the payback time of our efforts may be harder to quantify as would be the order of initiatives and interventions.

# NEXT STEPS

Once the recommended prioritization has been validated by the internal PTP stakeholders, USAID/PTP and the primary counterpart for the support would need to enter into a letter of intent or an memorandum of understanding to ensure resource commitment from all parties for effective USAID/PTP support. In tandem and before launching the support, USAID / PTP and counterpart/s will need to arrive at the content of respective business plan deliverables.

## 4.1 THE SIGNIFICANCE OF ENTERING INTO AN MOU AND FORMALIZING ASSISTANCE

There are a number of mechanisms used to direct the purpose and intention of relationships within the development and progress of industrial park creation or rehabilitation. The strategic intervention and support offered by government as estates are assisted will be valuable to the long term success of the assistance. Using memoranda of understanding (MOU) with the persons responsible for the site selected will do the following:

1. Express the terms of engagement between the parties and outline some of the actions to be explored
2. Give a historical record of who was involved and the purposes of their involvement
3. Offer the first stage roadmap of what is expected to be achieved through different phases of the relationship

Within the document, the following key components are included:

1. Assess the level of effort needed to achieve certain outcomes
2. Basic terms of engagement needed by all parties
3. Expectations management as we identify the level and depth of assistance, the likely outcomes and their longevity
4. A starting point for the types of internal skills needed to act within a working or steering group followed by assignment of specific persons to those roles

**Stated Objectives:** This work aims to reach a decision point on a couple of things:

1. Support and sustain certain geographical locations
2. Support and sustain the quality of the industrial inputs and outputs
3. Enhancement of their local consumption in the first instance and their ability to penetrate international markets at the highest price possible in relation to their quality
4. Support and sustain the structures being considered as they seek to add value to the range of inputs

## 4.2 AGREE ON THE BUSINESS CASE (THE DELIVERABLE) CONTENT

The concluding statements from the four SWOT papers for each industrial estate presented some baseline features common to the estates. The PTP team will review these factors and organize them into the business case table of contents and weight them accordingly.

- A: **Management Issues** – despite the best efforts on behalf of the estate managers and their boards, it appears that a capacity development opportunity exists for the Trade team to work with them to elevate their operating capacity and outputs. From the preliminary discussions the PTP team had with management, their willingness to cooperate is strong. The first assignment within this would be a review of the current governance structure and suggested improvements as well as the way in which operating budgets are reconciled against revenue

generated and the incentive to use these funds to expand capabilities and management services.

- B: **Hard Infrastructure Issues** – to be expected, the maintenance, upgrade and further modernization of foundation infrastructure is high on the agenda at all estates. The reliable supply of electricity, natural gas, road and rail networks, water treatment and waste processing and recycling/sewerage systems are significant items that always require assistance and funds. Independent of which estate is selected for support; all locations have a wish list of ailments requiring remedial effort.
- C: **Opportunity Assessment and Targeting** – each estate has its own thinking on the best industry and firm-level mix; and assistance can come in the form of an assessment on the supply side and demand side for layers of opportunity. For example, natural competitive advantage elements will include access to raw materials, labor inputs (skilled/semi/unskilled), access to enabling infrastructure such as road and rail to include access to domestic and international markets and time to market factors. A heavy strategic consideration is also the potential of efficient cross border trading routes from Pakistan to Afghanistan and Central Asia over time.
- D: **Incentive structure** – work needs to be carried out regarding the type and range of incentives possible and available to best assist estates attract the elements mentioned above. Included in the raft of options are tax benefits, duty free, subsidies on inputs, concessions and access to certain markets offering these tax reduction options. The impending decision on the shape of Reconstruction Opportunity Zones (ROZ), Special Economic Zone (SEZ) thinking and Free Trade Agreement (FTA) considerations will undoubtedly ripple through the system and cause the necessary shift in focus on zones and industrial estates. All zones are potentially impacted to varying degrees depending on their outputs and target markets and the percentage of local inputs in the case of ROZ.
- E: **Basic Safety and Security** – in order to invite and sustain varying levels of public and private sector confidence generally within a region and specifically within an estate (Brownfield or Greenfield), certain minimum standards of safety and security are required. It should be noted here that normal functioning market forces often preclude the estates and regions under consideration here by the PTP team. However, the clear understanding of the PTP mandate is to work within areas of unmet need, which are often counterintuitive to normal investment practices. Despite this, the estates under examination all offer different strengths and opportunities despite the obvious limitations. Assistance with basic safety and security may involve capital expenditure (e.g. simply a boundary wall and functioning guard system) in the traditional sense of industrial development in the first instance. Industrialists visited and interviewed complained of potential harm to their person(s), and these are the people who are willing and able to invest their own resources in the hope that others will join and support them.
- F: **Skill development and training** – considered to be ‘soft’ infrastructure inputs by some, this is one obvious area where assistance could be defined, measured (for impact) and implemented. The list can include: common facility and training center; development and training institutes; testing laboratories and the organization of targeted domestic and international visits (to include conferences/specific meetings/road shows). This subset of assistance can have an element of ‘quick wins’ as well as strategic and sustainable outcomes. Assistance in this area targets productivity and efficiency measures as recognized competitive measures for Pakistan and its export orientation aspirations.
- G: **Services and Integration Elements** – falling into this category are: a good availability of suitable worker accommodation (or provision of); proximity to education and hospital facilities; banking and other commercial services; recreation and entertainment facilities (or proximity). The strength of the PTP team is to incorporate these elements into the overall assistance package by working ‘micro-interventions’ as well as medium to long term structural interventions such as the design and commissioning of common social spaces for all to enjoy on their time off



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