

Boosting Pakistan's Export Competitiveness: Private Sector Perspectives

Proceedings from Round Table Meetings held in
Islamabad, Peshawar, Karachi and Lahore
September - November 2017



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1. Summary

Global and regional trade integration offers Pakistan tremendous potential in driving and sustaining growth and poverty reduction. Despite this potential, trade has not been effectively leveraged to catalyse growth in Pakistan in recent years. Trends in relative trade and competitiveness have been worrying, with export earnings declining 20 percent over the period FY2011-2017 and market share contracting by 1.45 percent annually. Understanding the constraints on trade and competitiveness from the perspective of the private sector engaged in export activities is critical to developing and implementing effective trade policy.

To support the Government of Pakistan in the preparation of its new Strategic Trade Policy Framework (2018-23), the World Bank Group conducted a series of private sector stakeholder consultations with current, past and potential Pakistani exporters in the manufacturing, agro processing, and services sectors. A total of 254 private sector representatives participated in four separate events organized in different provinces between September and November 2017.

This note summarizes the main concerns expressed by the private sector during these consultations. The note's main objective is to contribute to a fruitful private-public dialogue which can ultimately lend inputs for trade policy. The role of the World Bank Group in this respect is to bring together the private sector and the public sector, so that the constraints that the former face are presented to the latter. As such, the challenges to be summarized here are those identified by the key firms present during the private sector engagement meetings, during the fourth quarter of 2017, and not by the World Bank Group.

Key challenges to export competitiveness identified by the private sector via these consultations include:

- a) regulatory constraints at federal and provincial government levels,
- b) high cost of doing business, including energy costs and import tariffs,
- c) inadequate trade facilitation and supporting instruments,
- d) lack of coordinated support from institutions responsible for export promotion and help towards market and product diversification,
- e) weak availability of credit for exports, particularly for potential and new exporters, and
- f) an exchange rate regime that is perceived to reinforce the anti-export bias of the de facto trade policy.

Participating business associations also called for a detailed evaluation of reasons due to which intended benefits from Pakistan's free trade agreements (FTAs) and European Union's Generalised Scheme of Preferences (GSP+) could not be achieved.

2. Background

The round table meetings were held between the period September to November 2017 in Islamabad (26th September), Peshawar (19th October), Karachi (9th November), and Lahore (14th November). The meetings had participation from all sectors of the business community including agriculture, manufacturing and services sub-sectors. The meetings were organized in collaboration with relevant business associations including Federation of Pakistan Chambers of Commerce and Industries, Islamabad Chamber of Commerce and Industries, Lahore Chamber of Commerce and Industries and Sarhad Chamber of Commerce and Industries.

The meetings also had participation from sectoral associations e.g. All Pakistan Textile Mills Association, Pakistan Pharmaceutical Manufacturers Association and Pakistan Software Houses Association for IT and ITES.

The key objectives of these meetings were:

- a. To identify constraints being faced by existing exporters, disaggregated by minor or major limitations that exporters are confronting
- b. To identify barriers that potential exporters, particularly small and medium enterprises (SMEs) are facing while engaging in trade
- c. To point out regulatory, policy, infrastructural and knowledge gaps that are averting exporters from engaging in trade and
- d. To identify major restrictions and barriers that are being faced by existing and potential women exporters.

The interventions and recommendations from these consultations will be presented to Ministry of Commerce as a key input for Strategic Trade Policy Framework (2018-23).

3. Methodology

The team conducted a detailed assessment of past studies providing insights into macro and micro level constraints impeding competitiveness of key export-oriented industries in Pakistan. Current data on exporting sectors and 'direction of trade' information was also studied vis-à-vis competitor economies. This preliminary desk and literature review exercise helped in informing our consultations and round table meetings with the private sector. The heterogeneity of issues also motivated the team to host consultations at various key exporting destinations of Pakistan.

Identification of enterprises: To acquire knowledge on issues faced by a wide range of businesses, for each province, we split the invited enterprises for consultation across four groups. These included current exporters, past exporters, services sector and potential exporters. There was no preference of pre-selecting

any sectors and therefore the invitation was sent out to the meta directory of exporters in each of the collaborating chambers of commerce and industries. It was also important to ensure the presence of past exporters i.e. those who are still active in business however are unable to remain an exporter due to internal or external constraints. The category of 'potential exporters' included representation from small and medium enterprises (SMEs). Again with in the SMEs there was no preference to pre-select any of the sectors and therefore we had sent out an invitation to the office bearers of Chambers of Small Industries. The presence of large exporters was ensured with the outreach provided by Pakistan Business Council.

With help of the Board of Investment (BoI), Trade Development Authority of Pakistan (TDAP) and Small and Medium Enterprises Development Authority (SMEDA) we also ensured the presence of businesses persons (or entities) who are representing Pakistan in inter-governmental working groups hosted by multilateral and bilateral trade forums. This included leadership (or their nominee) from Pakistan Afghanistan Joint Chamber of Commerce & Industry, India Pakistan Business Council, Iran Pakistan Joint Business Council etc.

Provincial participation: A key reason to host the meetings at various exporting hubs of Pakistan with in three different provinces was to document the heterogeneity of issues faced by different regions. While we were able to meet with business persons from Khyber Pakhtunkhwa, Punjab and Sindh provinces, the business persons from Balochistan participated in the Islamabad meeting. The representation from Lasbela district of Balochistan was also ensured in the Karachi meeting. In our opening session of all meetings, Ministry of Commerce, Government of Pakistan was invited to explain the objectives of this exercise and expected outcomes.

The opening session (see programme at annexure 1) which also included a detailed presentation by WBG titled 'Unlocking Private Sector Growth through Increased Trade and Investment Competitiveness' also had presence from various other government bodies including State Bank of Pakistan, BoI, TDAP, SMEDA, and provincial Planning & Development Departments. The latter sessions however only focused on private sector's own discussion based on Chatham House rule i.e. participants were free to exchange ideas and possibly use the information received as they will, but not reveal the identity nor the affiliation of any other participant making interventions.

Organisation of breakout activity: After the WBG presentation, a brief question and answer session was allowed. This was followed by clear guidelines to all the participants how to split across their respective groups and undertake (group) discussion. The participants' name was shown on the screen under any one of the categories according to their current status i.e. current exporter, past exporter, services sector, or potential exporter. The format of registration form (annexure 2) allowed us to make the group wise distinction. Once seated they were provided with one group questionnaire for discussion and preparing a (group) response. Any participant wishing to provide their own industry's perspective or individual response could also complete the same questionnaire independently, besides also contributing to the group interventions.

All groups had one hour to complete their discussion around questions (provided at annexure 5). They were allowed additional time to prepare group presentations. For the remaining time of the meeting, each group was provided at least 20 minutes (followed by question and answer session of 5 minutes) to present their perspective.

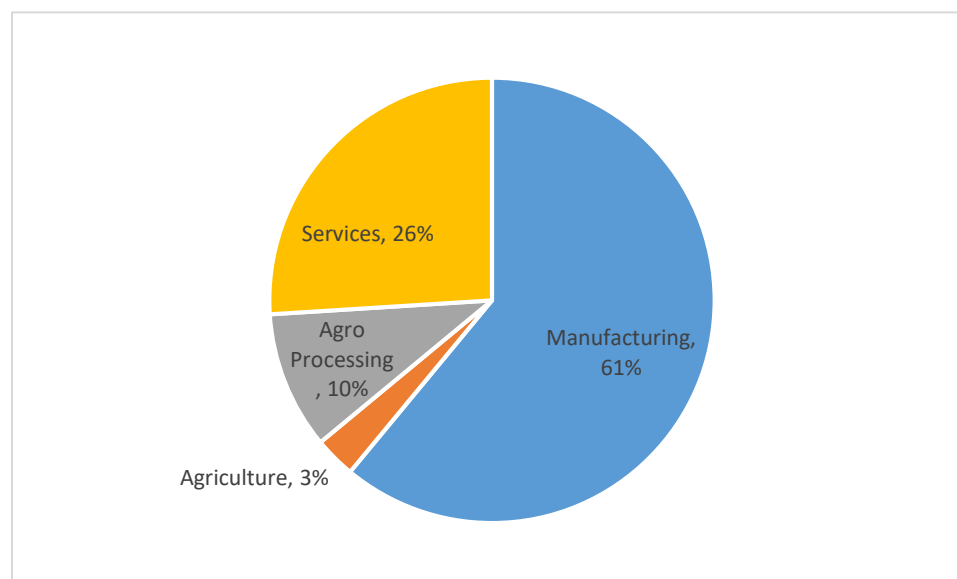
Reporting of proceedings and way forward: While the team aims to present findings from the round table meetings to the Ministry of Commerce as a key input for Strategic Trade Policy Framework (2018-23), the

same will also be presented in a national-level public-private policy symposium which will have presence of leading business leaders, relevant government officials, and noted trade economists from Pakistan. A key expectation from this symposium would be to present the consolidated findings from across Pakistan and validate the final recommendations being put forward to Ministry of Commerce, Government of Pakistan.

4. Key challenges to export competitiveness

The qualitative responses come from 254 respondents who had participated in Islamabad, Peshawar, Karachi, and Lahore meetings. The male-female ratio across the overall sample was 3:1, however we may note that this is not representative of the enterprise universe in Pakistan. Around 71 percent of the participants were from the manufacturing and agro processing sectors (Figure 1) while the remaining were from the services sector. Within the manufacturing sector, key sub-sectors represented at the meetings include: textile, steel, pharmaceuticals, cement, auto parts, chemicals, oil and gas, construction material, fast moving consumer goods, and engineering. The food processing segment was also represented in all meetings. From the services sector there was a concentration of firms from information and communication technologies, finance and insurance, transport, health care, education and capacity building, and consulting services.

Figure 1: Sectoral Representation of Participants



In terms of current status of businesses, 35 percent were current exporters, 23 percent were past exporters, 22 percent were from the services sector and remaining 20 percent were potential exporters. As per SMEDA's

employment size criteria, 72 percent of our participants represented SMEs, while 28 percent were from larger entities.¹

The key challenges highlighted during our meetings are categorized below under select broad categories:

- **Energy costs:** There needs to be a policy to put a cap on the gas and electricity tariffs faced by exporting entities. The frequent changes in rates of utilities have adversely affected the forecasted cash flows and result in reduced competitiveness vis-à-vis peer economies. The current exporters suggested that gas and electricity tariffs should be in-line with the competitor economies e.g. Bangladesh, India and Vietnam (cross-country rates of gas and electricity provided in Annexure-4). The potential exporters explained that while the supply of energy has improved over the past 12 to 18 months, however cost per unit has not come down.
- **Distortions in taxation:** The tax regime faced by exporters and importers of raw materials and machinery also requires certainty in the medium term. Recent changes in tariffs and regulatory duties, without a comprehensive discussion in the parliament or with the business community have increased the cost of trade across the country.

The current exporters suggested that the general sales tax (GST) and other tax related rebates must be provided on all exports through an automatic adjustment (as per the report of [Tax Reform Commission](#)) and exporters should not have to repeatedly knock on the doors of Federal Board of Revenue (FBR) to settle refund amounts.

The 'potential exporters' group in Lahore came up with specific tax-related interventions which could help bring down cost of compliance for SMEs. They explained that there is a need to reduce GST, tariffs and regulatory duties on imported intermediate goods. Furthermore, the total number of taxes faced by SMEs at the federal, provincial and local level currently stands at 56 as per a 2015-16 exercise by the Bol. These may be consolidated to bring down compliance costs. To encourage formalization of SMEs in Balochistan and Khyber Pakhtunkhwa, it was suggested that documentation-related complexities (at the time of registration and renewal with Securities and Exchange Commission of Pakistan, FBR, provincial tax authorities, and municipal regulatory bodies) in the current company incorporation and taxation regime may be rationalized.

The manufacturing sector exporters, particularly from Lahore and Karachi explained that the mandate of Tax Reform Commission may be expanded to see how the role of FBR can be transformed into an entity which helps manufacturing sector's exports. Currently over two-thirds of the overall burden of government revenue collection falls on the industrial manufacturing sector. The tax exemptions to large agriculture and agro-processing businesses may be revisited.

- **Financial intermediation:** The lack of adequate banking channels with neighboring countries (e.g. Afghanistan, Iran, and India) and non-traditional export destinations e.g. central Asian economies is not letting exporters realize their potential. Also, the existing banking system of Pakistan must be made compatible with key export destinations in order to ensure that there are no undue financial barriers to trade.

¹ An entity employing up to 250 employees is termed small and medium enterprise.

The business community from disadvantaged and conflict-hit areas of Balochistan and western Khyber Pakhtunkhwa highlighted the lack of tax-free raw material imports and tax holidays to restart industrial growth. The micro, small and medium enterprises (MSMEs) in these areas have demanded a policy of preferred purchase across government procurement, however this may require changes in the rules being currently followed by Public Procurement Regulatory Authority of Pakistan.²

It may also be difficult of MSMEs to complete the traditional compliance requirements of financial institutions for accessing credit for working capital and fixed investment. Examples from ASEAN economies were highlighted where banks were encouraged to customize their credit products, simplify the process of application and offer flexible payback options for MSMEs. However, it was noted that such customization should also include guarantees by the government which can save MSMEs from collateral requirements. Similarly, the central bank will need to consult MSMEs, many of whom may be potential exporters, before introducing any new financial services in order to ensure appropriate inclusion and uptake.

The past exporters explained that the financing under State Bank of Pakistan's Export Finance Scheme³ and Long Term Financing Facility (LTFF)⁴ should be expanded for past exporters currently failing to regain their market.

The services sector and potential exporters from this sector explained that the Central Bank regulations on lending procedures for services sector exporters need to be updated in view of the current difficulties faced by this sector.⁵ The State Bank of Pakistan's 'Prudential Regulations for SME Financing' require more detail on support to services sector start-ups with a view to enhance their exporting capacities.

- **Customs processing:** The time taken for custom clearance must be reduced in order to facilitate exports, especially for perishable items.⁶ In the case of delays in clearance of perishable items, there must be a mechanism of public-private risk sharing. The automated system being used by the customs department until now has shown mixed performance. The customs software at land route trading posts often suffers due to lack of efficient internet connectivity. This allows officials to resort to the manual customs processing in turn also opening the doors for rent seeking.
- **Exchange rate regime:** The State Bank of Pakistan should convene a quarterly public private working group to discuss recommendations on the prevalent exchange rate management. Currently there are varying views within the government regarding the overvalued exchange rate.

The current exporters suggested that an overvalued exchange rate should be allowed to gradually adjust to its equilibrium value. This will benefit the key export-oriented industries in the longer run. The management of exchange rate policy should also take in to account the fast changing value of currencies in the competitor economies.

² The term 'preferred purchase' refers to additional points (or preference) which may be given to these suppliers during the competitive bidding process.

³ For details on Export Finance Scheme see <http://www.sbp.org.pk/incen/BookGuidlines-EFS.pdf>.

⁴ For details on LTFF see <http://www.sbp.org.pk/incen/FAQs%20on%20LTFF%20Scheme.pdf>.

⁵ The SBP policy on SME finance may be seen here <http://www.sbp.org.pk/sme/PolicyPromotionSME-Finance.pdf>.

⁶ Pakistan's position on Logistics Performance Index may be seen here <https://pi.worldbank.org/domestic/performance/2016/C/PAK>.

- **Export promotion infrastructure:** There is a need for the trade associations, chambers of commerce and industry and the federal and provincial governmental trade promotion departments (e.g. provincial Boards of Investment, departments of industries, etc.) to develop their capacity to research non-traditional markets abroad and possible future export destinations and products. This may include conducting road shows, expositions, etc. to help in marketing export products on the global market, the collection of requirements regarding quality standards, and ancillary requirements for developing technical and managerial skills. A diverse market may enhance the probability of exporting all types of goods. The trade offices in embassies of Pakistan may also aid in identification and promotion of potential exports in their respective regions. The business community was not satisfied with the outreach of commercial and trade officials posted in Pakistani embassies abroad. They should be given annual targets, failing of which a replacement should be considered.
- **Transport and warehousing:** There needs to be a policy to put a cap on the transporting and warehousing costs faced by exporters. One way to achieve this may be through lowering the burden of taxes (and other levies) on transport and warehousing sector in return for certainty and lowering of price by private operators. Currently, several dry ports across the country are not effectively operational. Furthermore, the travel and dwell time faced by consignments is uncertain due to bottlenecks in in-land- and border-related trade infrastructure.

The current exporters suggested that there is a need to review and lower (through policy changes) costs of transport and transit fees faced by the exporters. The provincial and local toll taxes also contribute to higher costs of moving the consignments. Several such taxes or levies can be consolidated. In this regard, this group was concerned regarding weak consultation around National Transport Policy 2017. This policy may be amended to include specific provisions which bring down the costs in transport and warehousing sectors.
- **Fiscal support for exporters:** All fiscal incentives or subsidy packages provided to the exporters should be evidence-based. There should be a careful evaluation of past textile export packages provided by the Prime Minister – to see how much such packages have delivered in the past. Most export packages suffer from weak targeting.⁷ It was suggested by current exporters in Khyber Pakhtunkhwa that a scorecard method at the Securities and Exchange Commission of Pakistan could lead to a clearer identification of new and potential exporters. Fiscal support should be strictly targeted towards these groups. Furthermore, such support should be time bound and with clear export targets in volume or value (of exports).
- **Role of FTAs and evaluation of GSP+:** An evaluation is also required to see why Pakistan has not been able to achieve the benefits at a scale envisaged after the awarding of the European Union's GSP+ arrangement. The representatives of FPCCI emphasized that all FTAs and preferential trade agreements (PTAs) may be carefully reviewed in the interest of local manufacturing industry and services sectors. This is particularly important at this stage as Pakistan is negotiating the next phase of China-Pakistan FTA.

⁷ See chapter on export competitiveness in Ahmed, V (2017) Pakistan's Agenda for Economic Reforms. Oxford University Press, Karachi. <https://oup.com.pk/new-arrivals/pakistan-s-agenda-for-economic-reforms.html>

The past exporters explained that their industries could not compete after signing of FTAs with some very large economies. These included businesses from plastics, furniture, wood and wood products, paper and paper board. Such FTAs should be revisited and revised to allow a level playing field to the local manufacturing industry.

The services sector participants in Lahore suggested that the revision of China-Pakistan FTA should include provisions for services and foreign direct investment and agreement on double taxation settlement.

- **Agriculture input costs:** The uncertainty around agricultural imports needs to be cleared. Several imports (including inputs) are regulated and only allowed for a temporary period and at uncertain rates of import tariffs. This will send a strong signal to farmers of major and minor crops who face the risk of large price variations under an ever-changing trade policy towards the crop, livestock, forestry and fisheries sectors. The indirect taxes on agricultural inputs e.g. general sales tax also need rationalization. Currently, agriculture inputs are exposed to cascading due to lack of an effective value added tax mechanism.⁸

- **Gaps in Skilled and Semi-skilled Labour market:** The current exporters explained that the technical and vocational education training (TVET) institutes need to respond to the needs of local manufacturers. Most TVET institutions are focused on producing semi-skilled and not skilled labour.

The 'potential exporters' group in Islamabad also explained that the incubators at the engineering universities need to be encouraged through changes in provincial development policies (e.g. Punjab Growth Strategy) and specific programmes under the provincial annual development plans to help start-ups in manufacturing sector to sustain the initial period of their existence and also become exporting entities over the medium term.

- **Issues specific to services exports:** The Services Sector Export Development Strategy formulated by the Ministry of Commerce may be revisited and after consultation with all services sector stakeholders, a revised strategy may be approved by the Cabinet. Given a large skilled workforce in the information technology sector, the government should prioritize IT-enabled services across the services activities (e.g. trade in IT-enabled health services and medical tourism).

The Services Sector Export Development Strategy should also consider new sectors where the cost of skilled professionals within Pakistan is lower in comparison to peer economies (e.g. in provision of medical transcription services). Special Economic Zones (SEZs) are also required for services sectors along with tailored facilitation such as incubation services for start-ups. Most services sector start-ups or exporters are dependent upon internet penetration, therefore overall infrastructure gaps which prevent IT-connectivity needs to be addressed in rural and even peri-urban areas.

Consultation processes and dialogues with trade bodies must involve all the stakeholders in the services sector. Currently there is no structured mechanism for public-private dialogue with the services sector, neither at the federal nor provincial government level.

⁸ Cascading here refers to tax burden that is applied at every stage in the supply chain, without any adjustment for the tax already paid at earlier stages. This distorts the production decisions and increases cost of doing business.

- **Gender-specific barriers to trade:** The problem of exclusion of women from mainstream trade policy discourse in Pakistan was highlighted as a key concern. This was also cited as a critical reason as to why gender-specific barriers to expansion of women businesses and women's participation in trade have not been addressed during the recent past. A key demand of most current women exporters is greater access to information and networking.

The potential women exporters felt that the women chambers of commerce and industries (CCIs) still lacked the capacity to guide their members towards becoming exporters over the medium to longer run. The city-specific chambers of commerce and industry and federation of CCIs has still not allowed adequate representation of women at senior levels of management. The relevant wing which regulates CCIs at the Ministry of Commerce has also not sent strong advice to chambers and associations to make adequate representation mandatory.

The potential women exporters also expressed the desire that TDAP subsidize the participation of (women) entrepreneurs from disadvantaged regions of Balochistan and Khyber Pakhtunkwa.

The participants in the Lahore meeting highlighted gender-specific non-tariff barriers (NTBs) and called for safe amenities in land-based trade check posts. They see vast potential of trade with India through Wagah border, particularly in sectors such as textiles, jewelry, bridal dresses, cosmetics, processed food and herbal products. Therefore, they recommended one-window trade and tax facilitation centers along with converting all regulatory compliance processes to online.

The past (women) exporters informed that a key cost which they were unable to bear relates to testing and certification requirements. In their opinion, there was no guidance available through the government channels on how to adapt with the fast changing certification requirements abroad. They cited the example from other South Asian countries where there are one-stop web portals and telephonic hotlines to guide women and build their capacity to cope with this issue.⁹

As potential women borrowers or applicants for export finance continue to face barriers in accessing formal banking channels, therefore it was highlighted that the necessary training of banking sector officials on gender-sensitive banking operations may be part of the central bank's prudential regulations.

- **Certification requirements:** The past exporters informed that getting product compliance and relevant certification to remain in traditional markets and penetrate in non-traditional markets has become an expensive exercise. The facilitation programmes from other South Asian countries were again cited. During the meetings, no specific details or examples regarding such programmes were discussed. It was revealed that a key reason why Pakistan was unable to achieve the anticipated gains from GSP+ was weak knowledge of certification requirements particularly for non-textile items in which Pakistan enjoys market access.
- **Regulatory burden:** The group of past exporters during the Islamabad meeting suggested that the National Accountability Bureau¹⁰ may constitute a working group to study regulatory burdens on key export-oriented industries, costs of delayed business prosecution and corruption in dealing with

⁹ For example see SAARC Chamber Women Entrepreneurs Council. <http://www.scwec.com>

¹⁰ The National Accountability Bureau is Pakistan's apex anti-corruption organization.

government, particularly faced by SMEs not able to afford such transactions costs. For example, reducing the human interface in federal and provincial tax departments was cited as an example which could bring down costs related to corruption.

The potential exporters highlighted that the number of days and procedural steps required to obtain connection of utilities needs to be reduced.¹¹ Similarly, for plant expansion and land acquisition, application-and-wait time for licenses and permits may be reduced. The members of this group in Lahore meeting explained that several businesses were waiting to get electricity connections even after a wait of 12 months in the Sundar Industrial Estate – a flagship venture of Punjab Industrial Estates Development and Management Company.

5. Province specific prioritization of issues

There were variations across provinces in terms of key priority issues hindering competitiveness. In the case of Sindh, main challenges included: a) dealing with tax authorities, b) lack of required skills in the labour market, c) weak role of business associations in demanding reform; providing awareness regarding their dialogue with the government and demanding facilitation, d) high tariff rates on imported inputs, e) lack of support for research and development in current and potential exporting sectors, f) weak banking channels at potential export destinations.

A key concern during this meeting was that Sindh is the only province which is unable to trade with neighbouring country via land route. On the utilities and related inputs, the members of potential exporter group felt that the formal businesses are now receiving uninterrupted energy supply, however the cost of electricity and gas is high vis-à-vis competitor economies.

In the case of Punjab, main challenges were: a) an uncertain post-18th constitutional Amendment regulatory regime faced by businesses - including the municipal, environmental and labour permits requirements, b) shortage of labour with required skills, c) complex tax regime for small exporters, d) lack of government support towards: timely coordination (within government) of export promotion measures, technological advancement support, and expansion of marketing efforts in potential export destinations.

The business associations from Punjab wanted greater interaction with their counterparts in China and India to allow exchange of ideas regarding future trade and investment cooperation. They were particularly concerned over lack of consultation on the free trade agreement between China and Pakistan currently under revision. Current exporters felt that exports to India could be increased via land routes if government is willing to negotiate the NTBs faced by Pakistani exports in lieu of effectively addressing those NTBs faced by Indian merchandise in Pakistan. The issue of lack of transparency in exchange rate management was also highlighted as a key concern – something which heightens expectations of a future free fall of the Pakistani rupee. There was also a desire that annual evaluation of trade missions based in Pakistani embassies abroad should be carried out against a baseline and published for the knowledge of the business community.

¹¹ For example see WBG's doing business in Pakistan analysis here:
<http://www.doingbusiness.org/data/exploreeconomies/pakistan>

In the case of Khyber Pakhtunkhwa, while issues faced in compliance with taxes and refunds remained a key concern (which is also preventing formalisation of businesses), the production side barriers to adoption of new technologies was highlighted. This could be a limiting factor as regards participation of enterprises from Khyber Pakhtunkhwa in China-Pakistan Economic Corridor (CPEC) programmes. This was followed by several other challenges including: a) lack of labour as per demands of the changing production requirements, b) weak coordination of federal and provincial government to deliver export promotion packages for Khyber Pakhtunkhwa's business community, c) weak awareness regarding government facilitation in marketing, testing services, and visa facilitation, d) overvalued exchange rate, and e) expensive and uncertain supply of energy. Several sector-specific associations were concerned regarding the arbitrary imposition of regulatory duties.

Some other challenges include: lack of effectively operational dry ports in Khyber Pakhtunkhwa, fast changing state policies towards transit trade with Afghanistan (a key concern of services sector exporters), damage occurring to merchandise being traded via Torkhum border, and slow progress in the area of mineral development – a sector which the local business community feels can bring medium to long term dividends.

Before moving to provincial meetings the team had also conducted a round table consultation in Islamabad, where the business community from Balochistan province had also participated. Again, apart from the usual constraints related to taxation, energy and the exchange rate, a key concern was the manner in which Pakistan was trying to pursue FTAs with Brazil, South Korea, Turkey, Thailand and some other trade partners. The business associations were concerned that broad based consultations had not taken place before the framework meetings of these FTAs. Similarly, the representatives of manufacturing associations showed their concern at the lack of information available to local businesses regarding opportunities in Gwadar and SEZs under CPEC. The business community in Balochistan also wants export promotion as a key target in the recently announced 'Prime Minister's 10-year Uplift Package' for the province.



Figure 2: Key response words from Islamabad Round table meeting on 26th September, 2017



Figure 3: Key response words from Peshawar Round table meeting on 19th October, 2017



Figure 4: Key response words from Karachi Round table meeting on 9th November, 2017

Annexures

Annexure 1: Agenda for the meeting¹²

09:30	Registration
10:00	Welcome Remarks by Dr. Vaqar Ahmed, SDPI Remarks by Patchamuthu Illangovan, Country Director, World Bank Group, Islamabad. Remarks by Mohammad Younus Dagha, Secretary Commerce, Government of Pakistan.
10:30	Introduction to consultation methodology and breakout sessions by SDPI
10:40	Technical presentation by World Bank
11:00	Refreshment Break
11:15	Breakout sessions Note: Participants will be invited to split across 4 groups. Each group will be provided a set of five questions/issues for discussion.
12:15	Presentation by Group Leads and Q&A
13:15	Closing remarks and comments by World Bank
13:20	Roundup, way forward and vote of thanks by SDPI
13:30	Lunch

¹² This agenda is for Islamabad meeting. In the meetings held across provincial capitals, heads of WBG Islamabad office and Ministry of Commerce were represented by their nominees.

Annexure 2: Exporter Identification Form

Sr. No.	Name	Enterprise name	Designation	Gender [M/F]	Main product/service provided by your enterprise?	Are you a current exporter? [Yes/No]	Have you been an exporter in the past? [Yes/No]	Is your entity SME or large enterprise?	Email or cell #
1									
2									
3									
4									
5									
6									

Annexure 3: Presentation by World Bank Group

**WORLD BANK GROUP**

Trade and Competitiveness
Global Practice (GTCDR)

**WORLD BANK GROUP**
Trade & Competitiveness

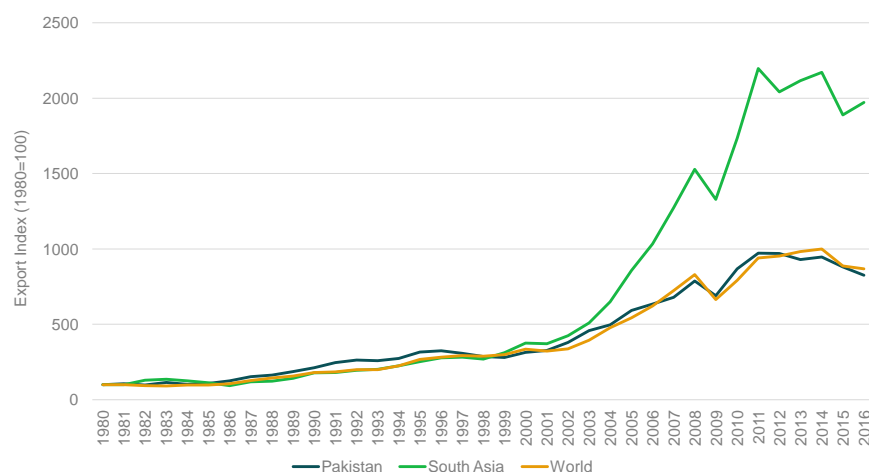
**Pakistan – Unlocking Private Sector Growth
through Increased Trade and Investment
Competitiveness**

Trade dynamics in recent years

1

**WORLD BANK GROUP**
Trade & Competitiveness

Pakistan's exports grew far more slowly than those of its South Asian peers



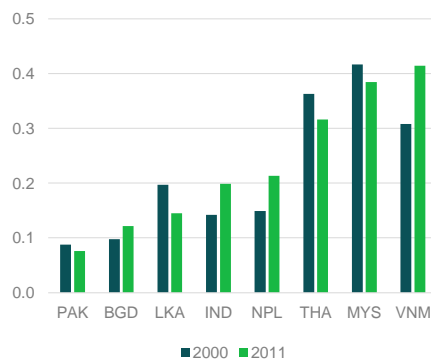
Source: Estimates from UNCTAD statistics, World Bank staff calculations.

2

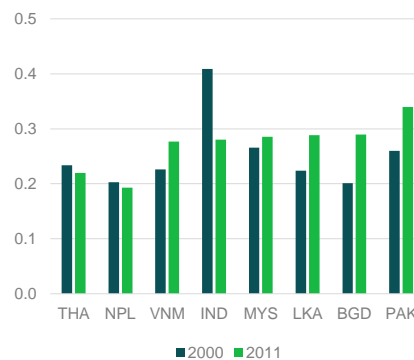


...because Pakistan has not fully embraced the GVC revolution...

Foreign Value Added in Gross Exports



Domestic Value Added in Third Country Exports

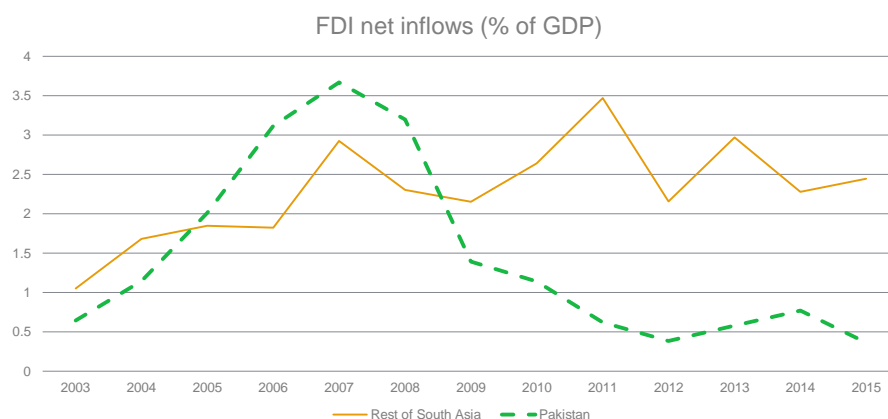


Source: Estimates from EORA, World Bank staff calculations.

3



...and it shows in lower FDI inflows...

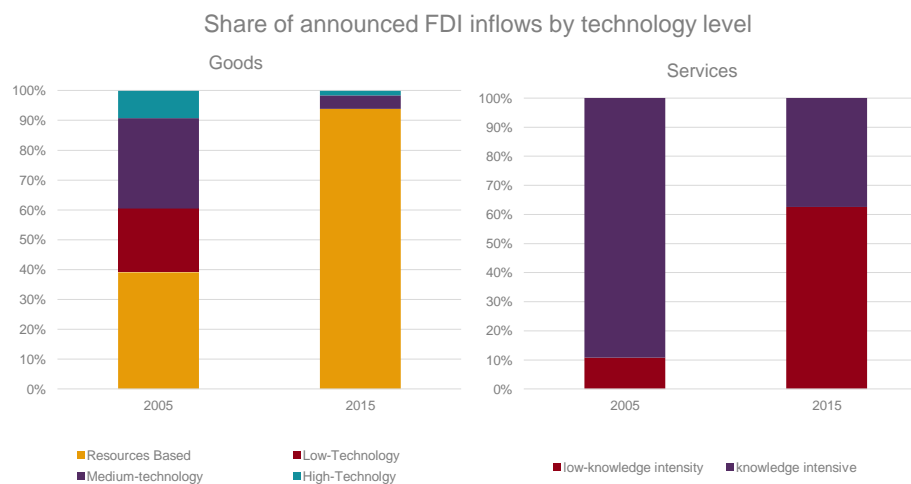


Source: Estimates from UNCTAD statistics, FDI Markets and World Bank staff calculations.

4



...and in less sophisticated FDI flows - critical for diversification and productivity gains

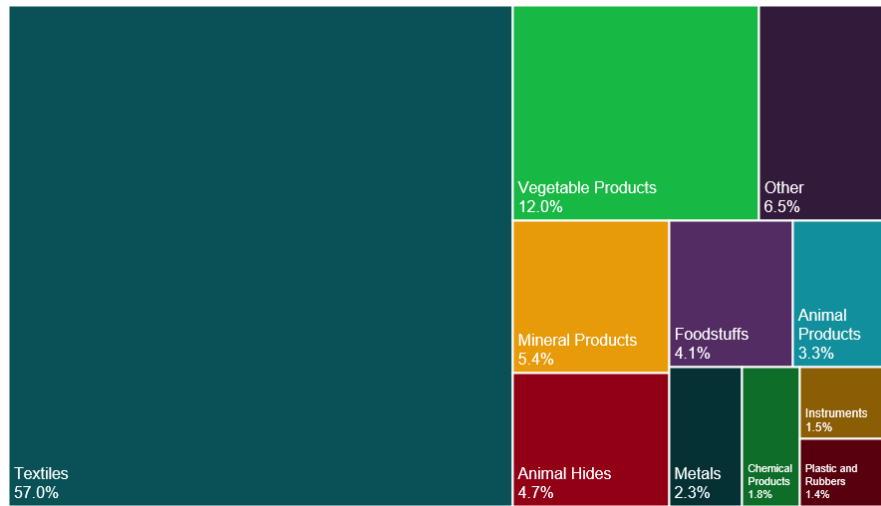


Source: FDI Markets and World Bank staff calculations. Note: Refers only to press announcements. During 2015, Natural resources investments are related with Coal, Oil and Natural Gas projects from (China, UAE, UK, Poland)

5



Indeed, Pakistan's export basket is concentrated, with textiles and foodstuff representing more than 70% in 2015

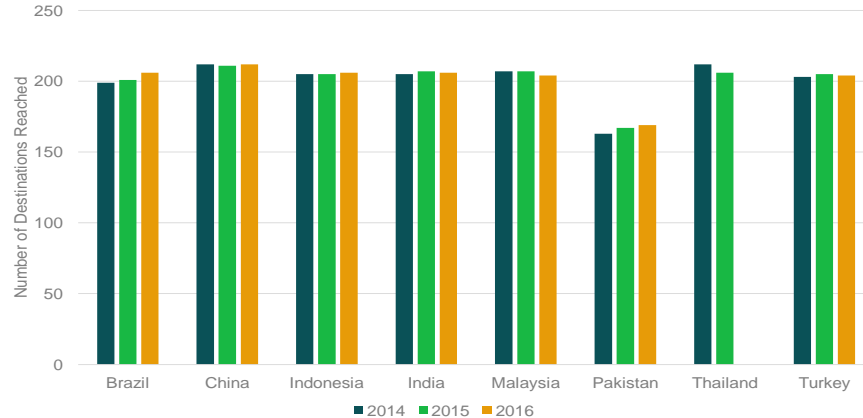


Source: Observatory of Economic Complexity

6



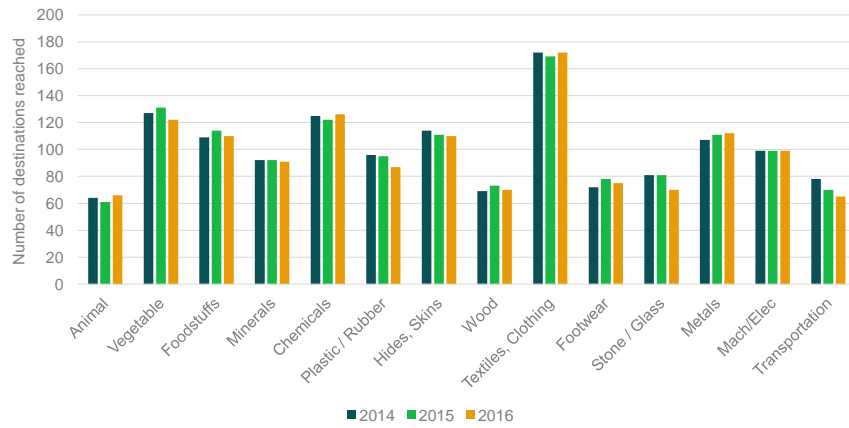
...and also in terms of markets, concentration is comparatively high...



7



...only selected products reach a wide set of destinations...



Source: WITS

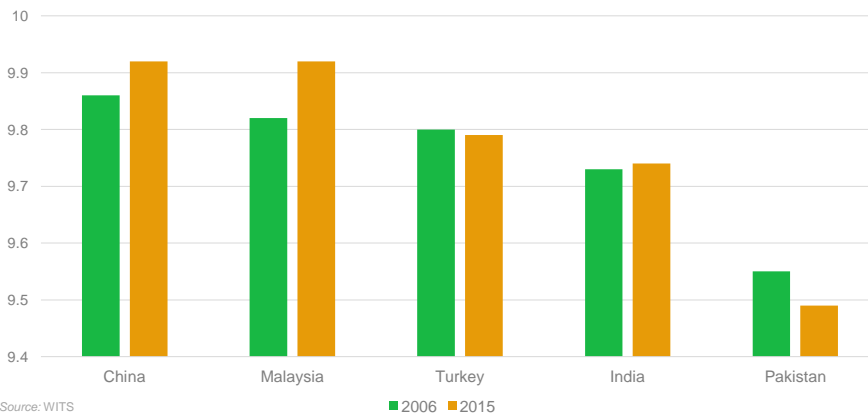
Notes: This indicator is a measure of the diversification of trade along the destination dimension by product.

8



...and sophistication has also been lagging behind...

Sophistication of Exports (EXPY)



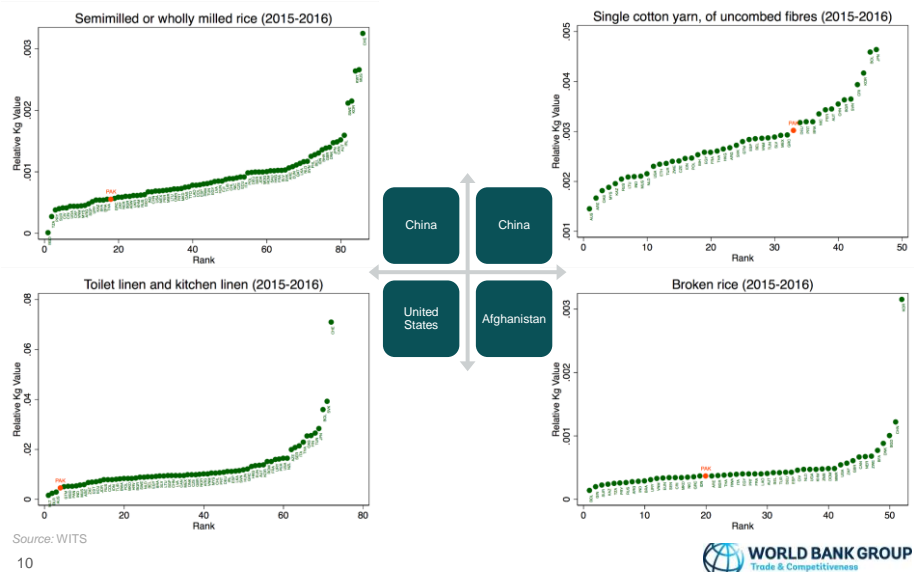
Source: WITS

Notes: Estimating the level of technological sophistication embodied in a country's export portfolio gives an indication of that country's economic development. The country's expected GDP per capita, EXPY, is given by summing all the PRODY (weighted average of per capita GDP of countries producing that product, with weights derived from revealed comparative advantage) values for the products exported by the country, each weighted by the product's share in total exports.

9



... with lots of space for quality upgrading



Why has Pakistan's relative trade and investment performance declined?

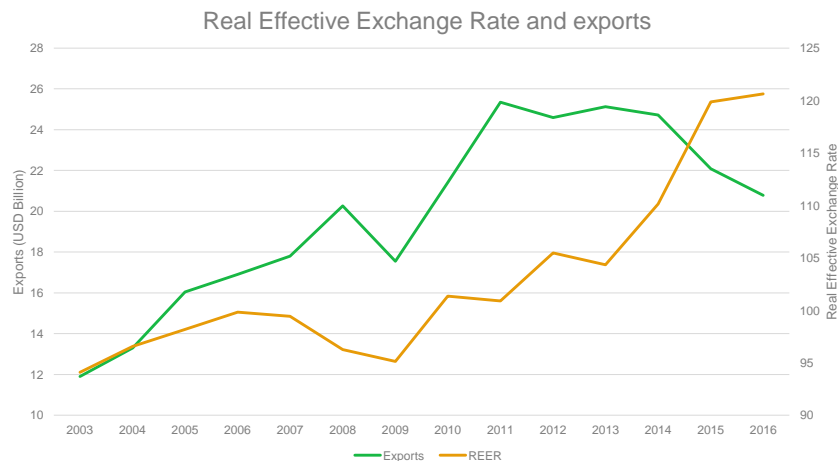
The declining trend in Pakistan's relative competitiveness has structural underpinnings anchored in four areas:

1. Relative prices
2. Trade Policy
3. Trade Facilitation, Logistics and Infrastructure
4. Investment Climate

12



Pakistan's exports are sensitive to real exchange rate movements

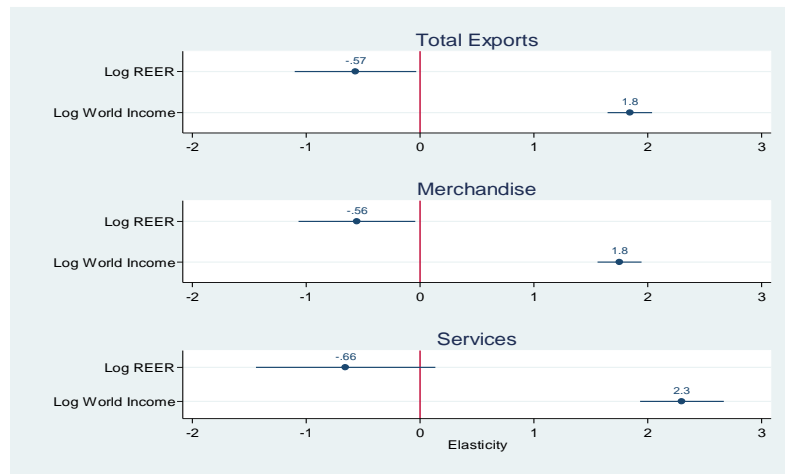


Source: Estimates from UNCTAD statistics and State Bank of Pakistan's, World Bank staff calculations
 Notes: The real effective exchange rate is referred as REER, which measures the development of the real value of a country's currency against the basket of the trading partners of the country. Increases in the REER denote real appreciations

13



... indeed, the 30 percent appreciation since 2010 contributed to a decline in exports of 17 percent

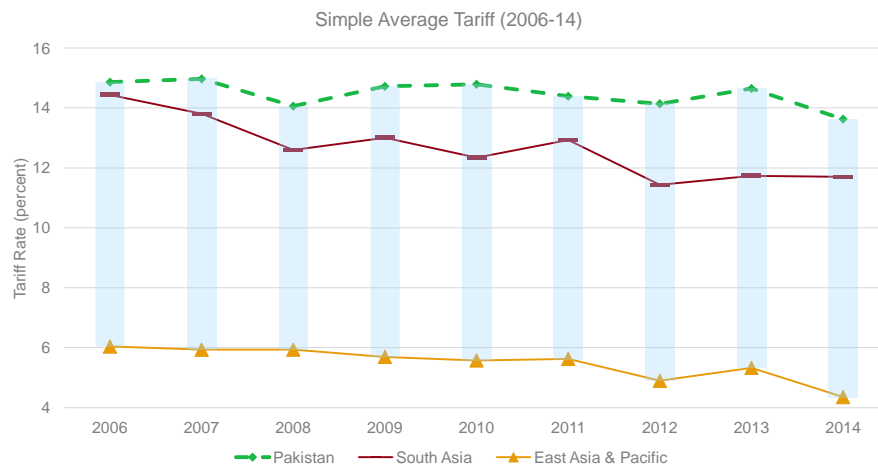


Source: Estimates from UNCTAD statistics and State Bank of Pakistan's, World Bank staff calculations
Notes: The real effective exchange rate is referred as REER, which measures the development of the real value of a country's currency against the basket of the trading partners of the country. Increases in the REER denote real appreciations

14



Pakistan has a protectionist, discretionary and complex trade policy

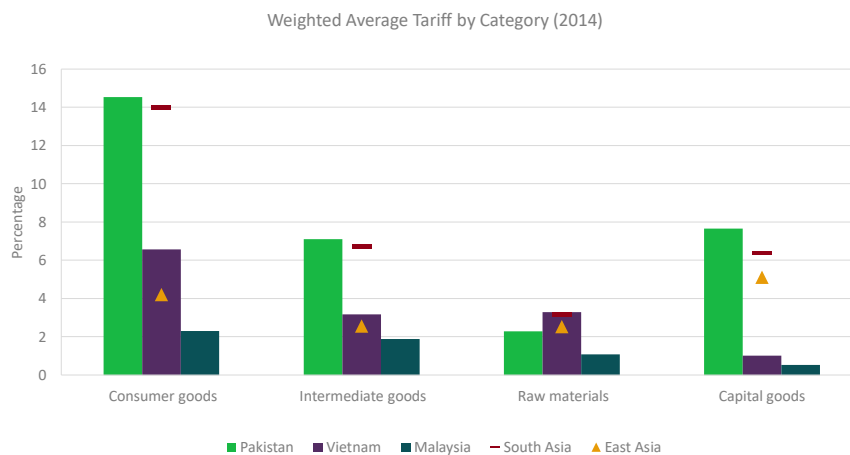


Source: Estimates from WITS, World Bank staff calculations.

15



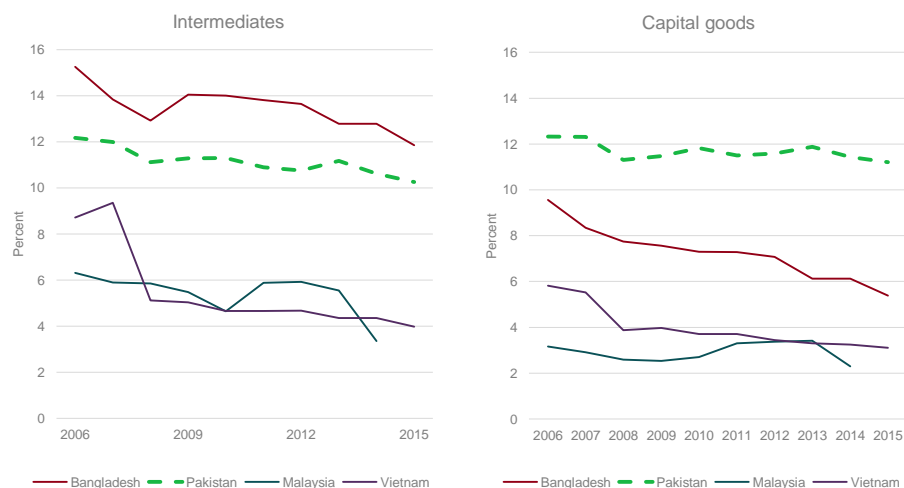
... and tariff rates are high compared to other countries and regions



16



Observed tariff liberalization efforts in capital and intermediate goods are not enough



17



... and are often inconsistent with other policy measures

	Number of tariff lines paying RDs	% total imports paying RDs	RDs revenue as % of paid custom duties
FY 12/13	105	0.6	1.9
FY 13/14	250	0.7	1.9
FY 14/15	568	9.7	9.3
FY 15/16	1,090	11.9	15.7

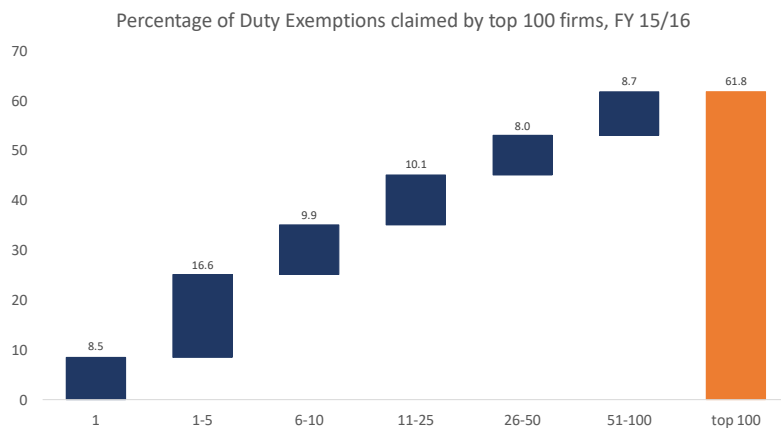
Source: Authors' elaboration with customs data from FBR.

Source: Estimates from WITS, World Bank staff calculations.

18



And exemptions don't do the trick: they are skewed towards larger firms

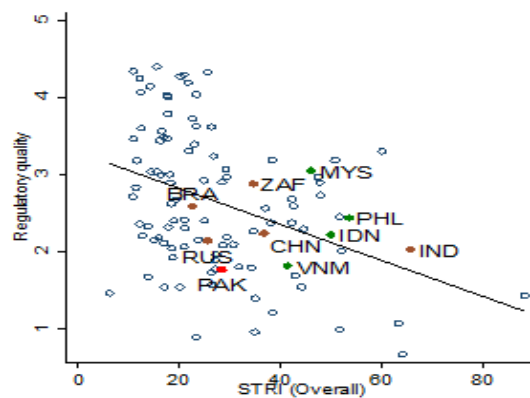


Source: World Bank staff calculations.

19



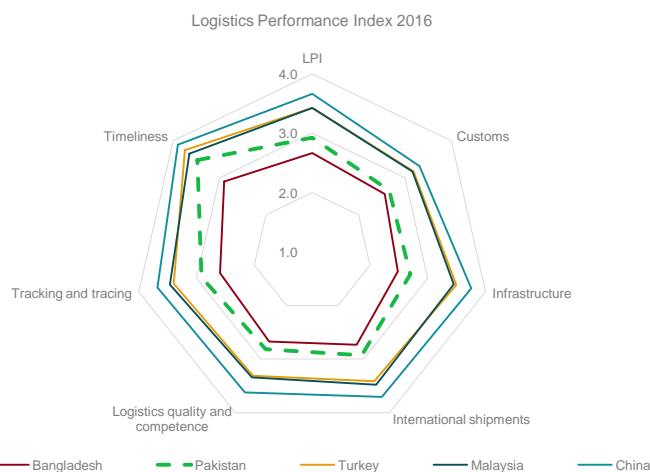
In services trade policies, there are also some inconsistencies



Source: World Bank STRI, trade in services database WDI.
20



Trade facilitation and logistics need to be improved to enhance GVC integration



Source: WITS, World Bank staff calculations.

21

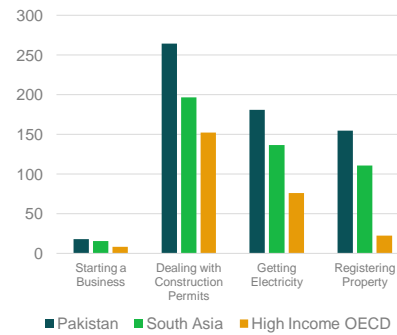


Investment climate constraints continue to impede private sector growth

Pakistan's performance on DB indicators, 2017
Position: 144/190 Economies



Time Entailed in Doing Business



Source: World Bank Doing Business, World Bank staff calculations.

22



What would it take to move the trade agenda forward?

23



Now it's your turn! Your opinion matters

Private sector engagement exercise

24



RESTORATION OF EXPORT COMPETIVENESS OF TEXTILE INDUSTRY

APTMA
26th
SEPTEMBER
2017

TRADE & EXTERNAL SECTOR-INDICATORS US \$ Million

Commodities	FY 16	FY 17	FY 18 Projected
Exports	20,802	20,448	19,572
Imports	44,765	53,026	58,020
Trade Deficit-Goods	(23,963)	(32,578)	(38,448)
Trade in Services -Deficit	(2,400)	(3,573)	*(4,075)
Total Deficit in Goods & Services	(26,363)	(36,151)	(42,523)
Remittances inflow	19,915	19,304	18,492
Total External Deficit	(6,448)	(16,847)	(24,031)

Sources: PBS, SBP

* Value from last three years average increase in deficit

POTENTIAL CLOSED CAPACITY

Items	Unit	Maximum Exported	Current Exports	% Change	Value @ Current Prices
		Quantity	Quantity (2016-17)		\$ Million
Cotton Yarn	M. KGs	740	455	-39%	778
Cotton Cloth	M. Sq. Mtrs	2,625	1962	-25%	717
Hosiery & Knitwear	M.DoZ	132	113	-14%	396
Bed Wear	M.Kg	365	353	-3%	73
Towel	M.Kg	192	183	-5%	39
Ready Made Garments	M.DoZ	41	35	-15%	400
Synthetic Fabrics	M. Sq. Mtrs	843	123	-85%	1,200
Potential Direct Exports Forgone per annum				\$ 3,602 Million	

* 30-35% of Production capacities of Textile industry closed

TEXTILE & CLOTHING EXPORTS GROWTH

Value \$ "Billion"

Countries	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	% Change 2011-17
India	27.7	32.9	32.3	35.4	37.6	36.3	36.4	31%
Bangladesh	19	21.4	24.6	28.4	30.7	31.8	31	63%
Vietnam	15.2	16.7	18.1	21.5	25.2	28.4	31.5	107%
Sri Lanka	4.1	4.2	4	4.5	4.93	4.82	4.9	20%
Pakistan	13.8	12.4	13.1	13.7	13.5	12.5	12.5	-10%

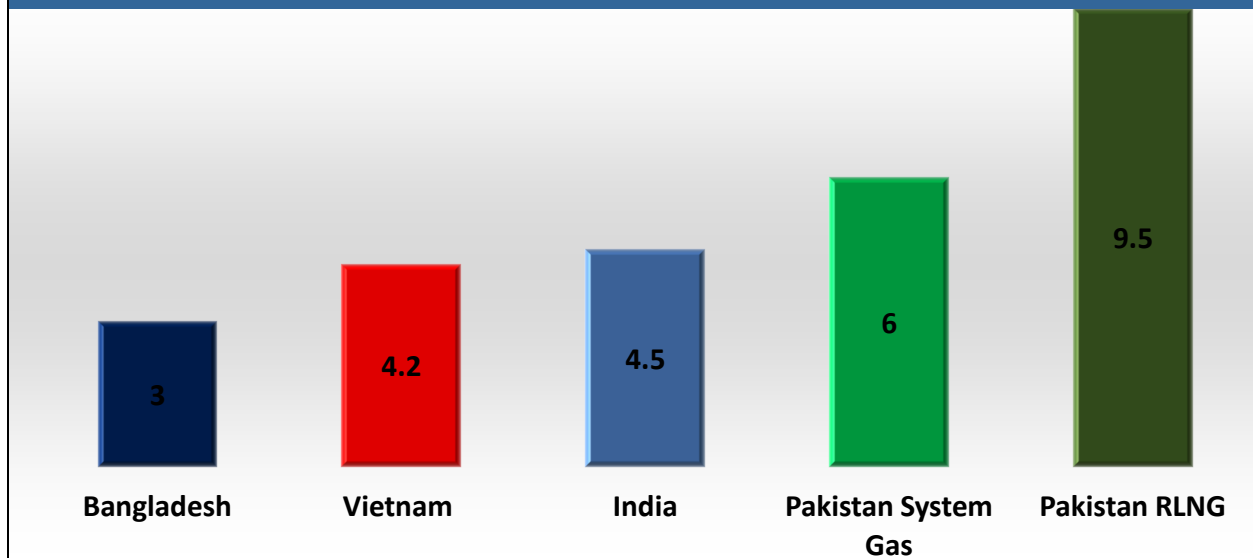
ENERGY

- Energy cost is more than 30% of the total conversion cost in spinning, weaving and processing industries.
- Industrial gas tariff of Pakistan is 100% higher whereas electricity tariff is approx. 50% higher compared to regional competitors.
- Electricity is burdened with various surcharges of Rs. 3.63/kWh which represents excessive line losses, theft and system inefficiencies. In reality textile industry is supplied electricity through dedicated feeders with little or none line losses or non-payments.
- Gas is burdened with various add on^s including (GIDC, UFG and irrational and excessive cost of supply)
- RLNG pricing is supposed to follow the principle of ring fencing but in contravention system wide excessive UFG of more than 9.2% is being charged whereas international norms allow for only 2% UFG

Textile Industry can not pass on system inefficiencies to its international buyers.

GAS TARIFF COMPARISON

US \$/MMBTU FOR TEXTILE INDUSTRY



World LNG Estimated Landed Prices: Jul-17



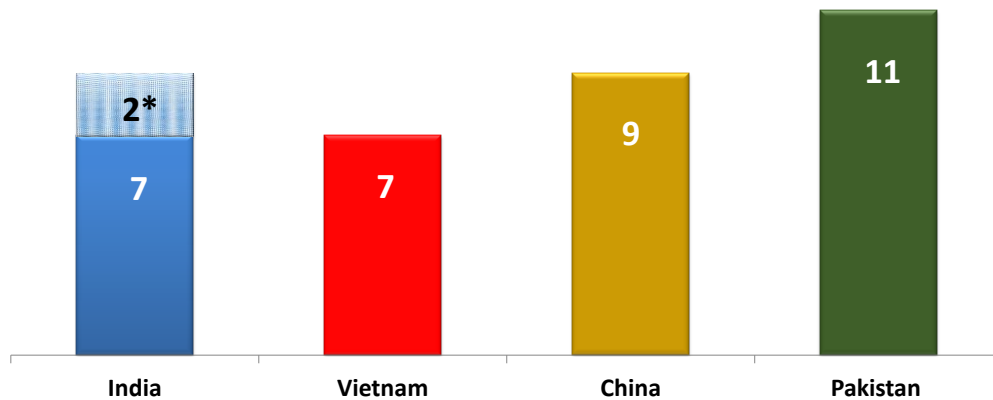
Source: Waterbome Energy, Inc. Data in \$US/MMBtu.
 Note: Includes information and data supplied by IHS Global Inc. and its affiliates ("IHS"). Copyright (publication year) all rights reserved. Prices are the monthly average of the weekly landed prices for the listed month. Landed prices are based on a netback calculation.

Updated: Aug-17

In contrast the DES import price for July in Pakistan was approximately 6.73 \$ per MMBtu

ELECTRICITY TARIFF COMPARISON

US Cent /KWh FOR TEXTILE INDUSTRY



* India' State governments are giving subsidies ranging from US cent 1 to 2 cents per unit.

Electricity tariff for Xingjiang province of China further subsidized to 6 cents per Kwh

EXPORT POTENTIAL

Detail	Unit	Volume
Surplus Yarns	Million KG	740
Surplus Grieg Fabrics	Million SQM	918
Surplus Processed Fabrics	Million SQM	1,706
Processed fabric if surplus yarn & Grieg converted	Million SQM	5,584
Additional Exports Potential (convert into garments)	Value	\$ 11.9 Billion
Revival of Closed Capacity Potential	Value	\$ 3.6 Billion
Total Export Potential	Value	\$ 15.5 Billion

Additional Investment \$ 6 Billion
Additional Jobs Creation 3 Million

ESSENTIAL INITIATIVES FOR RESTORATION OF VIABILITY AND GROWTH OF TEXTILE INDUSTRY AND EXPORTS

IMMEDIATE MEASURES

1. Implementation of PM's Export led Growth package in letter and spirit.
 - a) Immediate payment of drawback of taxes on realization of export proceeds to manufacturers cum exporters by State Bank Of Pakistan.
 - b) Withdraw condition of 10 percent increase in exports for eligibility of duty drawback from July 2017- June 2018.
 - c) Allow Duty / Tax free import of Cotton to provide internationally competitive raw materials to the industry.
2. Payment of all outstanding refunds of Sales Tax of the industry due upto June 2017.
3. Withdraw surcharges(Rs. 3.50/kWh) to bring electricity tariff at par with region @ Rs. 7/KWh. Provide RLNG/Natural gas (inclusive of GIDC) at Rs.600/mmBTU to the Industry across the country
4. Appropriate Exchange Rate adjustment to reflect actual market conditions.

Group 1 Questionnaire

Name _____ Table _____

Question 1:

What do you export and where?	What would you like to export and where?

Question 2: What are the main constraints that you face when exporting or scaling up exports (e.g. access to finance, inputs, and energy; finding clients; dealing with standards, customs, taxes and tariffs; exchange rate risk etc.)?

Note: Please use additional pages if required.

Question 3: What is preventing you to enter more sophisticated markets?

Question 4: What is the nature of problems that you face when dealing with various government departments, in the process of exporting?

Problems	Proposed Solutions

Question 5: Do you see competition from foreign enterprises as a challenge or an opportunity, why?

Group 2 Questionnaire

Name _____ Table _____

Question 1:

What were you exporting and where?	What would you like to export and where?

Question 2: What were the main difficulties due to which you have stopped exporting (e.g. access to finance, inputs, and energy; finding clients; dealing with standards, customs, taxes and tariffs; exchange rate risk etc.)?

Note: Please use additional pages if required.

Question 3: What has prevented you to enter more sophisticated markets?

Question 4: What was the nature of problems that you faced when dealing with various government departments, in the process of exporting?

Problems	Proposed Solutions

Question 5: Do you see competition from foreign enterprises as a challenge or an opportunity, why?

Group 3 Questionnaire

Name _____ Table _____

Question 1: What do you produce/manufacture?

Question 2: What is stopping you from starting to export? (e.g. access to finance, inputs, and energy; finding clients; dealing with standards, customs, taxes and tariffs; exchange rate risk etc.)?

Note: Please use additional pages if required.

Question 3: What is preventing you to enter more sophisticated markets?

Question 4: What are the major problems that you face when dealing with various government departments, which may also act as a disincentive for you in becoming an exporter?

Problems	Proposed Solutions

Question 5: Do you see competition from foreign enterprises as a challenge or an opportunity, why?

Group 4 Questionnaire

Name _____ Table _____

Question 1:

Which service are you providing?	Are you able to export this service?

Question 2: What are the main constraints that you face when exporting or trying to export (e.g. access to finance, inputs, and energy; finding clients; dealing with standards, customs, taxes and tariffs; exchange rate risk etc.)?

Note: Please use additional pages if required.

Question 3: What is preventing you to enter more sophisticated markets?

Question 4: What is the nature of problems that you face when dealing with various government departments, in the process of exporting or trying to export?

Problems	Proposed Solutions

Question 5: Do you see competition from foreign enterprises as a challenge or an opportunity, why?

Annexure 6: List of Meeting Participants

Islamabad¹³

Name	Enterprise Name	Designation
Zohair Ahmed	Amreli steels	PR Affairs
Barkan Saeed	P@sha	Chairman
Noshaba Shehzad Masood	ICCI	Director
Hassan Adnan	Wahid Fans	Director
Saad Adnan	Pak Fans	Director
Hina Mansab Khan	Laila Collections	Owner
Hassan Farid	Pak Steel	CEO
Wajid Iqbal	Amreli Steel	Resident Director
Nighat Umer	Pakistan Ordinance	Manager Export
M. Abdul Wahab	Zaireen e Haram Pvt. Ltd.	CEO
khurram Shahzad	KSB Pumps Co Ltd	AM Procurement
Nabeel Sabir	P@sha	Senior Manager
Asim Ghaffar	LMKR	VP R&D
Wajiha Syed	Ali Medical Center	Head of HR & D
Sheraz khan	Welt Konnect	DIR (Business Develop)
Haji Fojan	National enterprises	ADPIEA
Asif Ikram	MAP	President
Adil Bashir	APTMA	SUC
A. Rahim Nasir	APTMA	

¹³ This list is not edited. Only the names of focal persons are provided. Several of our participants were accompanied by multiple accompanying representatives from the same organization. Similarly business associations had ensured multisectoral presence during the group work. The names of these additional participants are being acquired from secretariats of these associations.

Hamid T. Khan	APTMA	General Secterary
Imran Shaukat	SDPI/ JOBI	Advisor
Faheem Sardar	Askari Security Ltd	CEO
Hafiz M Zia Ullah	KSB Pumps Co Ltd	DM
Jawad Ahmed	Fori Mazdoori	Operational HR Lead
Iqbal Kidwai	PCMA	COO/ General Secretary
Irshad Ahmed	Volta	Manager Export
Dr. Shiamil Daud	Maryam Memorial Hospital/RCCI	CEO
Faisal S. Khan	Ovex Technologies	CEO
Quratul Ain	Eastern Dresses	CEO
Usman Shaukat	Bio-Labs Pvt. Ltd	Director
Wasim Khokhar	Bridgig Trade	CEO
Mian Waqas	Fazal Ind	Director
Salman F Banday	KSB Pumps Co Ltd	Deputy Manager
Rehan Bharara	FGCC	Chairman
Sadia Waseem	Saddis Fashion	CEO
Syed Turab Haider Zaidi	Amreli Steels Karachi	Corporate Affairs
Mahwish Afiridi	RCCI	Chairperson Women Entrepreneur Excutive Member
Zahid Manzoor	Advance Engineering	Business Manager
Azra Akram	Lead Engineering	Team Lead
Hadi Shah	Innix-prime	Senior Executive
Urooj Fatima	Innix-prime	CEO
Mariya Razzaq	RCCI	Head of WBIC

Shanza Anwar	Anwar Industries	Director
Gul Zaiba Jawad	Pernia Couture	Head
Mariha Ali	Ali Impex	MD
Meher-un-Nisa	Ali Impex	V. Chairman
Rubia Fayyaz	Welt Konnect	Employee
M. Umer Tariq	RCCI	Head R&D
Asma Kamran	Mom's Food	Owner
Mr. Kamran	Mom's Food	Owner
Talha bin Afzal	P@sha	Program Manager

Peshawar

Name	Enterprises Name	Designation
Rehma Riaz		Chief Executive
M. Sabir		CEO
Khawaja Younas Naseer		MD
Riaz	APP	Food Governor
Saima Amjad		Entrepreneur
Nasreen Aftab		Owner
Amber Zia	Zia Custom Agency	Director
Muhammad Adnan Jalil	FPCCI	Chairman Standup Committee
Faisal Bashir	APCEA	Executive Member
Mohammad Aslam	Ashraf Group	MD
Nauman Tariq	TACCI	Executive Member
Bilal Mutafta	Al-Bilal Enterprises	APCEA
M. Sohaib Roomi	Sami n Sami	Director

M. Ali Zahid	Emirates Airline	Sales Manager
Muhammas Nauman Shah	Amin Group of Industries	Director
Zahid Ullah	KPCCI	President
Engr. Khalid Haider	FPCCI	Executive Officer
Mazhar-ul-Haq	Trans World International	Chairman Export standing Committee
Ashfaq Afridi	SMEDA	Manager
Faausia Luqman	Chamber	President
Rasheed Paracha	FPCCI	VP
Mohammad Anees ashraf	Ashraf Group	Director
Jabir Ullah	Shahzad Enterprises	Director
Mujeeb Ullah	Mujeeb Enterprises	Director
Kawal Iqbal	WCCI Chamber	Project Coordinator
Sartaj Ahmad Khan	Chitral CCI	President
Mohammad Wazir	Wazir Traders	CEO
Minhaj	APCEA	Ex. Chairman
Syed Sabir Ali Shah	P&D Department	Senior Policy Advisor
Jamshed Savol	Premier Formica	CE
Waseem	Premier Model School & Colleges	Director
Shafique ur Rehman	Rehman Medical Institute	CEO
Abdur Rauf Shah	Bannu CCI	President
Lazeza	Liza Boutique & Gemstones	Owner
Akhter Amin	APCEA/ Amin Gold Smith	Exeutive Member/ SVC Standing Committee

Muhammad Qureshi	Fayyaz RCCI	
Mian Ifthikhar	Mian Ifthikhar Enterprises & Co	Owner
Dr. Yasir	IM Sciences	Assistant Professor
Col Abdul Rauf Khan	Karakoram Gemstones	CEO
Bashir Khan	FPCCI, Peshawar	Secretary
Muhammad Usman	Pak Match	Director
Muhammad Ikram	Ikram Nature Exploration Pvt Ltd	CE
Amir khan	FCCC	Press Secretary
Mushtaq ahmed	APCEA	SV Chairman

Karachi

Name	Enterprise Name	Designation
Altaf Maitlo	Ministry of Commerce	Assistant Chief
Nazir Ahmed	Imtiaz Enterprises	Business Manager
Uzma Taslim	KCCI	Research Director
Adil Nakhoda	IBA	ASST.PROF
Ms. Jordan	Swiss Consulate	Deputy Head
Saeed Sherani	PAAPAM	MC Member
S Rizwan Ali	Bahria	Manager BIC
A.Salam Shah	Ministry of Commerce	Director TP
Abdul Razaq	Ministry of Commerce	SO-TP
Maheen Salman	Global Consultancy	MD
Fletcher D. Albert	Swiss Business Council	BOM
Sidra Arshad	KCCI	Research Analyst

Nasir Rizwan	AkD Securities	
Faheem Baig	Karachi Metropolitan	
Farhan Ahmad	General Tyre	Company Secretary
Abdul Rahim	Galaxy Engineering	Ceo
Junaid Zameer	DP World	Ceo
Saleem Siddique	AGEC	Ceo
Ghazala Saifi	WCCI Karachi South	Founder SVP
Sayyid Mansoob	KMA Pakistan SME Board	Chairman
Mudassir Iqbal	Women Dev. Dept, GOS	Secretary
Capt.Muhammad Sarfaraz	Bureau Vertex Pakistan	Manger Marine
Nabeel Sabir	P@SHA	Senior Manager
Shehryar Hydri	P@SHA	Secetary General
Col.Khan Ullah	Ijara Capital	Executive Director
Mr. Majyz Aziz	Engineering	Group Chairperson
Mr. Aziz Memon	Kings Group	Group Chairperson
Mr. Tariq Ikram	TDAP	
Mr. Samir Amir	Pakistan Business Council	
Dr. Bilal Ahmed	FPCCI	Director
Dr. Shahida Wizarat	IOBM	
Mr. Sohaib Jamali	BR Research	
Mr. Hammad Siddiqui	CIPE	
Mr. Huzaifa	CIPE	
Ms. Marzia Raza	OUP Pakistan	

Lahore

Name	Enterprise Name	Designation
Hassan Ashraf	ACCA Pakistan	Business Development Manager
Umme Amen	AR Secondry school of science	Coordinator
Iqbal Kidwai	PCMA	Serectary General
Memosh Khan	Haleeb Foods	CEO
Rizwan Ahmed	Punjab Bank Ltd	CEO
Ziauddin	S.K Group	CEO
Anila Saleem	WCCI Lahore	Vice President
Shahid Jamal Kazi	IFI Consultant	President
Asad Feroze	Secondry school	Partner
Ali Saeed	STEMWR	Manager
Falahat	WCCI	President
Mazhar Iqbal	Ary News	Chief reporter
Ali Saeed	Jang News	Commerce reporter
Nadeem	Gloves Associator, Sialkot	Chairman
Dr. Shahid Raza	SR Consultant private Ltd	Chairman
Faaiza Amjad	WCCI Lahore	Senio Vice President
Sadia Khuram	CAREEM	GM Punjab
Col. Hasan Khawar	NCBAZE	Faculty
Mrs Huma	NCBAZE	Faculty
Sidra Zameer	WCCI Lahore	Member
Salman Javed	SAP-PAK	Manager
Faisal	SOS-CV Pakistan	Director
Iqbal	HANDS	Project officer

Naida	P & DD Punjab	Assistant Chief
M.Umer	Descon	Engg-BD
Kamran Niazi	USAID	EG
Wali	Skill city	CEO
Shams	Fazal Trade	CEO
M.Aslam	PWIARA	
M.Irfan	Planning Commission	Chief
Muhammad Ahmed Malik	Malik steel	Director
Muhammad Ahmed Malik	Malik dairies	Projector
Muhammad Ahmed Malik	Malik Garments	Projector
Muhammad Nouman	Six seconds	Project Mnanager
Khalid Mahmood	Mill ltd	Exective Director
M. A Hijaar	Market Eyen International	CE
Hafiz	PERI	Associate Research Fellow
M.Sajid Khan	Farhaj	Export Manager
Fatima Malik	BNU	Lecturer
Jamil Naz	APEC	
Ishrat Farooqui	KWCCI	Former President
Anusheh Naveed Ashraf	Invest & Innovate	Head of Insights
Dr. Azhar	Saver Feeds	Chairman
Sadia Malik	Inoaura Impact Ventures	CEO
Anis ul Haq	APTMA	Secretary General
Mumtaz Anwar	PERI	Director
Younus	HYK	

Dr. Javed	Lahore	Founder President
Usman Zahid	World Bank	Consultant
Ammara Farooq Malik	Seplaa Enterprises	CEO
Dr. Syed	Health Business	Managing Partner
Qaisra Sheikh	WCCI Lahore	Former President
Ather	The News on Sunday	Assistant Editor
Zulfiqar	AR Secondary school of Science	Section Head
Sohail Zahoor	Rudolf Pakistan Private Ltd	Finance Head
Javed	SMEDA	DGM
Nadeem Khan	SCBS	CEO
Shazia Suleman	WCCI Lahore	Exective Member
Dr. Jamshed	Poultry	CEO
Muhammad Basit	M.F Enterprises	G.M CEO
Sami	Public Private partenership cell	Head
Saad Afzal	SOS villages Pakistan	Manager
Mohd Tahseen	South Asia Partnership Role	L.D
Dr.Raheel	Punjab Revenue Authority	Chairman
Mauaz Raza	Us Consulate General Lahore	Economic Specialist
Dr.Saima	GCLL Lahore	HOD
Ali Ashghar	UMT Lahore	Research Fellow
Al Waqar	GCU Lahore	Researcher
Uzooba Mureen	PERI	Socialist
Sabih Zaka	Punjab small industries	
Dr.M Amjad Saqib	Akhuwat	Exective Director

Hasan Raza	U.S Consulate General Lahore	Specialist
Haroon Rashid	S.M Enterprises	Partner
Jamil Nasir	Customs	Collector
Hamid	Shahruh	CEO
Sajid Latif	DGLE-Gen	PITB
Dr. Yaamina Suleman	Institute of Admin. Sciences	Assistant Professor
Nadia Farwa	Trade Development Authority	Deputy Director
Dr.S.M Naeem	Punjab ECO	Research Fellow
Naveed Ahmed	Pharmacy-Health Care Ltd	Skills Manager
Muhammad Nawaz	Abedin	MD
Hussain	Ashraf Group of Industries	Manager Commercial
Maria	PPCBL	OG-2

Annexure 7: Select Media Mentions

Islamabad

Special Round Table Meeting on “Achieving Export Competitiveness in Pakistan” September 26, 2017

The Express Tribune Islamabad, September 27, 2017

Official sit down to discuss export competitiveness

By Our Correspondent

<https://tribune.com.pk/story/1517123/officials-sit-discuss-export-competitiveness/>

Daily Times Islamabad, September 27, 2017

Commerce Secretary stresses joint efforts to boost export competitiveness

By Staff Reporter

<http://dailytimes.com.pk/business/27-Sep-17/commerce-secy-stresses-joint-efforts-to-boost-export-competitiveness>

Pakistan Today Islamabad, September 27, 2017

Commerce sector urges broader national consultation to boost export

By Staff Report

<https://profit.pakistantoday.com.pk/2017/09/26/commerce-sec-urges-broader-national-consultation-to-boost-export/>

Daily [Parliament Times](#), Islamabad, September 27, 2017

Secy MoC for joint efforts to promote exports sector

<https://www.dailyparliamenttimes.com/secy-moc-joint-efforts-promote-exports-sector/>

Urdu Papers

Daily Express Islamabad, September 27, 2017

برآمدی مسائل کا حل مل بیٹھ کر نکالنا ہو گا، سیکرٹری تجارت
روزنامہ ایکسپریس، اسلام آباد، 27 ستمبر 2017ء

https://www.express.com.pk/epaper/PoPupwindow.aspx?newsID=1104578788&Issue=NP_ISB&Date=20170927

Daily Jehan Pakistan Islamabad, September 27, 2017
ڈھانگہ یونس گا، نکالنا ہو سے مشاورت قومی کا رکاوٹوں برآمدات
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'Public-private competitiveness must to enhance exports'

By Our correspondent

E-paper link: <http://e.thenews.com.pk/pindi/10-20-2017/page17.asp>

The News Islamabad/Rawalpindi, October 20, 2017

Need stressed for joint efforts to boost exports

Bureau report

<https://www.thenews.com.pk/print/238341-Need-stressed-for-joint-efforts-to-boost-exports>

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Roundtable

Pakistan fails to achieve desired results from GSP Plus

Our Correspondent

<https://tribune.com.pk/story/1536106/pakistan-fails-achieve-desired-results-gsp-plus/>

The Nation Islamabad, October 20, 2017

Joint efforts of public, private sectors a must for exports revival

By Staff Reporter

<http://nation.com.pk/business/20-Oct-2017/joint-efforts-of-public-private-sectors-a-must-for-exports-revival>

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KP traders, manufacturers stress broad-based consultations to boost exports

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KP traders, manufacturers stress broad-based consultations to boost exports

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Government to develop next STPF in consultation with private sector

By Parvez Jabri

<https://www.brecorder.com/2017/11/07/379516/government-to-develop-next-stpf-in-consultation-with-private-sector/>

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Strategic Trade Policy Framework

By BR Research

<http://epaper.brecorder.com/2017/11/13/2-page/681789-news.html>

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2018-2023: 'STPF must be based on constructive engagement between public and private sectors'

By Recorder Report

<https://fp.brecorder.com/2017/11/20171115235093/>

Pakistan Observer Islamabad, November 15, 2017

Public-private dialogue to be backbone of trade policy

By Salim Ahmed

<https://pakobserver.net/public-private-dialogue-backbone-trade-policy/>

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Public-private dialogue to be backbone of forthcoming trade policy framework

<http://nation.com.pk/15-Nov-2017/newsbrief>

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Pakistan's trade policy should be based on public-private dialogue

By Our Correspondent

<https://tribune.com.pk/story/1558498/2-pakistans-trade-policy-based-public-private-dialogue/>

The Frontier Post Peshawar, November 15, 2017

Public-private talks must for trade policy framework, says DG

By F. P. Reporter

<http://thefrontierpost.com/public-private-talks-must-trade-policy-framework-says-dg/>

Profit Magazine, Pakistan Today Islamabad, November 14, 2017

Public-private dialogue to be backbone of forthcoming trade policy framework: DG

By INP

<https://profit.pakistantoday.com.pk/2017/11/14/public-private-dialogue-to-be-backbone-of-forthcoming-trade-policy-framework-dg/>

Daily Aftab, Lahore November 14, 2017

'Trade policy to formed with mutual dialogue'

By Ramzan Asghar

<http://dailyaftab.pk/2017/11/14/trade-policy-to-formed/>

Annexure 8: Select Photos from the Meetings



The inaugural session of the Islamabad meeting underway Left to right: Dr. Vaqar Ahmed (SDPI), Ms. Nadia Rocha (WBG), Mr. Younus Dagha (Secretary Commerce), Mr. Patchamuthu Illangovan, Country Director WBG Pakistan, Mr. Gonzalo J. Varela (WBG)



Shanza Anwar (Anwar Industries) speaking to the group of current exporters with representation from Ali Implex, Pakistan Ordnance Factory, National Enterprises, KSB Pumps, APTMA and Bio Labs amongst others



The past exporters group discussion with Mian Waqas Masud (Fazal Industries), Mahwish Afridi & Umer Tariq (RCCI) and Wajid Iqbal Amrelli Steel amongst other participants



The services sector discussing exports constraints. Mr. Asim Ghaffar (Code for Pakistan/LMKR), representations from PASHA and the Pakistan Chemical Manufacturer's Association are present amongst others



The potential exporters including Dr. Shimail Daud (Mariam Memorial Hospital), Mr. Faheem Sardar (Askari Securities), Mr. Jawad Ahmed (Fori Mazduri) discussing the challenges which inhibit them from becoming exporters



SDPI Team Working on World Bank Group's Private Sector Engagement Project (Left to Right standing) Yasir Dil, Shahbaz Tufail, Asif Javed, Shujaat Ahmed, Dr. Vaqar Ahmed, Mohammad Umair, Ahad Nazir & Ahmad Durrani (Left to Right Sitting) Abbas Makan, Maryum Waqar, Yamna Arshad & Rabia Manzoor

