DIAGNOSTIC STUDY

TEXTILE SPARE PARTS CLUSTER FAISALABAD – PAKISTAN

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Table of Contents

1. Description of Product 4

1.1 Defining of Product & its type 4

1.2 Geographical Location 4

1.3 Production Process & Work Flow 5

2. Cluster Profile 7

2.1 The Customer –Textile Industry 7

2.2 Textile Spare Parts Industrial Cluster 8

2.3 Cluster Statistics 10

2.4 Cluster Issues 12

3. Cluster Actors 13

3.1 Core Cluster Actors 13

3.2 Other Cluster Actors 14

3.3 Other Players 16

4. Institutions Role 17

4.1 Current Institutional Matrix 17

4.2 Institutes that can be linked with cluster 21

5. Cluster Analysis **24**

5.1 SWOT Analysis 24

5.2 Current & Future Cluster Maps 26

6. Cluster Vision **30**

6.1 The Strategy 30

6.2 On Going Activities 33

6.3 Action Plan for the Current Year 34

6.4 Indexes 36

1 DESCRIPTION OF PRODUCT

1.1 Defining of Product & its Types

Faisalabad district has made rapid strides in the field of industry especially in textile after independence. It is now called the 'Manchester of Pakistan'' for its extensive development of textile industry. Approximately there were 426 large textile industrial units, medium units were 1000 and small level was 2500.

Besides textile industry, district Faisalabad is the hub of textile engineering industry, which manufactures power looms, knitting machines, winder machines, warping machine, sizing machine, inter locking, jiggers & parts and accessories of textile machines is an important industrial sector. Although large textile units had tendency to use most modern and latest machinery however smaller units entirely were dependant on local machinery, parts and expertise. Larger textile units also obtained the services of local textile engineering sector especially for parts of machinery etc.

On the basis of the textile engineering industrial survey in cluster under CDP, 30% parts of spinning machinery, 90% parts of weaving machinery, 55% parts of processing machinery and only 10% parts knitting machinery were locally manufactured. In fact, 95% of textiles spare parts industry in cluster constituted of Small & Medium Enterprises (SME's), out of which about 60% manufacturers were engaged in making parts of weaving machinery.

1.2 Geographical Location

The district lies from 30-35 to 31-47'C North latitude and 72-01 to 73-40'C East longitude. Faisalabad district came into existence in 1904 as Lyallpur and was located in central Punjab between River Ravi and River Chenab at an elevation of 605 feet above sea level. The district had an area of 5,856 sq km and a population of 35, 47,446 souls.

Textile spare parts were being manufactured in many cities of the country like Faisalabad, Lahore and Karachi. However the oldest and the biggest concentration of manufacturers were in Faisalabad. The Faisalabad textile spare parts cluster was highly decentralized and varied in terms of size and location. The small and unorganized units were located in areas of Samundri Road (Odeon Street), Sargodha Road (Yousaf Market), Shiekhupura Road and traders biggest market were located on Railway Road (Gulistan Market).

1.3 Production Process:

Raw Materials Sourcing:

There were two sources of raw material, Pakistan Steel Mill which produces only 15% to 20% of country's total demand of steel, metal and its alloys, manufacturers had to be sourced from import and scrap stores.

Casting:

Casting was melting of metal and injecting it into pre-made molds consisting of wooden/metallic boxes and sand.

Fabrication:

Fabrication was molding of metallic sheets into formation of a certain shape (done by re-rolling machines)

Machining:

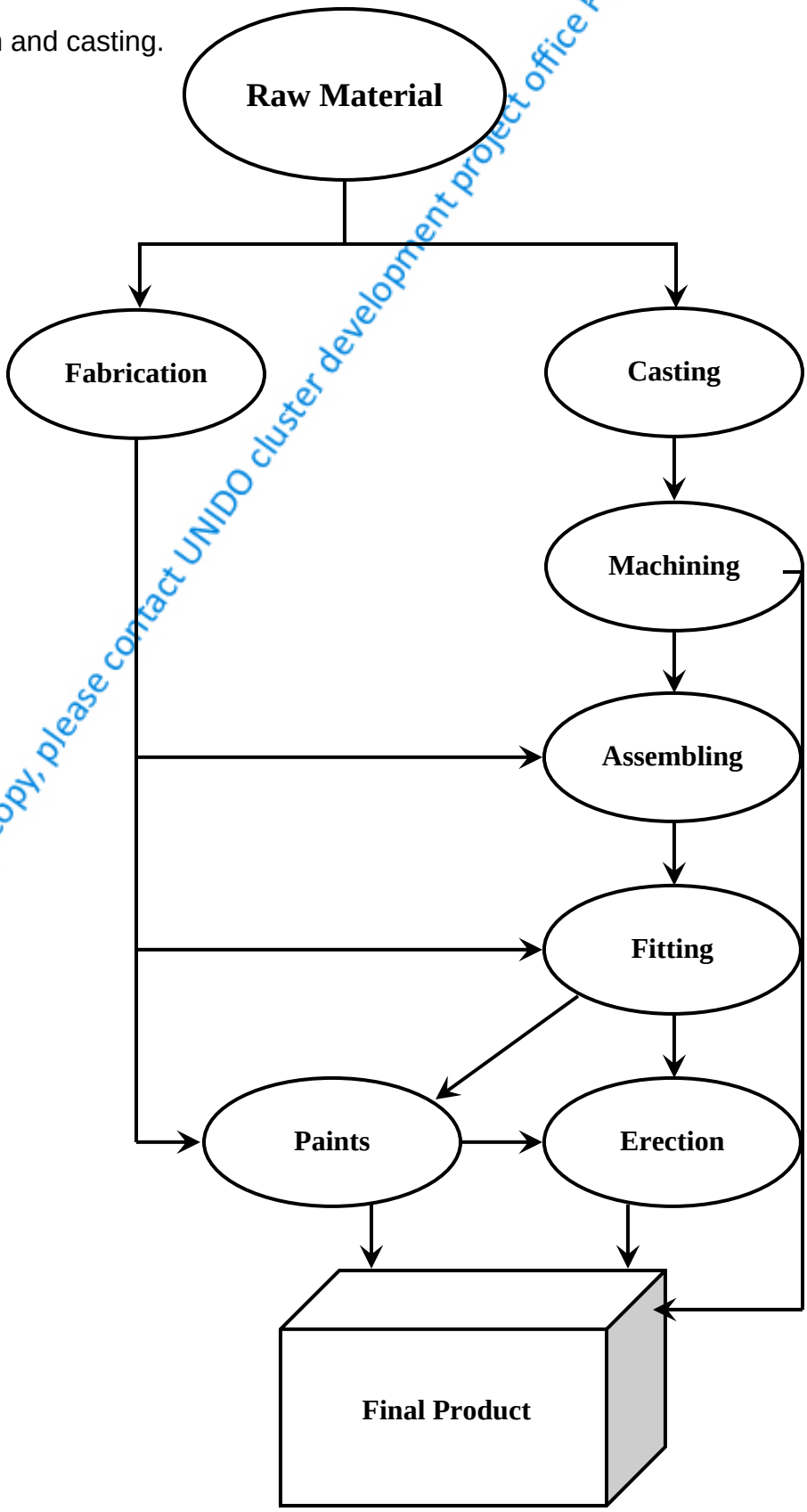
Machining was processing of parts after casting to fit into part specifications. It includes various processes like drilling, threading, and phasing.

Fitting and Erection:

Fitting and erection consisted of assembling of different parts to form desired product.

2. Production Process & Work Flow

Workflow differs with respect to products. Primarily divided into two categories i.e. Fabrication and casting.



2 Cluster Profile

2.1 Cluster Customer-Textile Industry

Faisalabad district had made rapid strides in the field of industry especially in textile after independence. It is now called the 'Manchester of Pakistan'' for its extensive development of textile industry. Approximately there were more than 4000 textile related small/medium/large scale registered and non-registered industrial units. Although large textile units had tendency to use most modern and latest machinery & parts however smaller units entirely depend on local machinery, parts and expertise. Larger textile units also obtain the services of local textile engineering sector especially for parts of machinery etc. Large textile units were using 90% latest textile machinery and parts that was mostly imported.

The textile sector related to cloth production was further sub-divided into numerous sub-sectors, all of which exist in Faisalabad and work like a chain. The sub-sectors for cloth manufacture include spinning, sizing, weaving, processing (calendaring dyeing/printing), stitching & apparels etc.

The hosiery industry sub-sector was spinning, knitting, washing, and printing, calendaring, cutting, stitching, pressing & packing. Compared to cloth the hosiery units were relatively small but their labor employment in relation to their investment was on high side. Small scale industry provides not only diversification to the industrial sector but it also provides strength and stability to it. The existing small

industry was mostly linked directly or indirectly with textile sector. It was pointed out that the labor engaged in small sector surpasses the labor employed by the large/medium size industry in Faisalabad.

2.2 Textile Spare Parts Industrial Cluster

Present Scenario

According to an estimate, there were about 250 small and medium-size textile spare parts units/workshops in Faisalabad engaged in manufacturing of prototype textile equipment and spare parts or providing repair services to the textile industry. Out of the total, approximately 85% were small workshop, 10% were medium and 5% were large units.

Majority of the units were not ISO certified. Standardization and quality control systems either do not exist or not being practiced in these units. All 250 units put together do not employ 30 qualified engineers. Baring a few, R & D was not even known to them. There were very few units which had their own material testing facilities or had an access to any such services from outside. This resulted in poor quality or in many cases an undue over engineering.

Most of these units had inherited know-how rather then scientific knowledge. High-tech engineering techniques almost did not exist for them. They produce parts of good quality as for apparent finish and look was concerned, but due to lack of knowledge about materials and chemicals composition, quality, standard and life span was not up to the requirements. The products manufactured locally, when displayed

against foreign good, offer a poor look, primarily because of unsightly finishing of welding seams, electroplating, painting and other surface treatments.

However, it had also been stated by industry stakeholders that about 500 vender units were serving the local textile parts industry. Approximately 10,000 direct or indirect employments were involved with this industry and hence this industry was playing a vital role to alleviate poverty in the country. Almost all the main sectors of textiles i , e spinning, weaving, dyeing, & finishing, knitting, canvas and towel manufacturing were being served by this industry in different.

Even the locally manufactured textile machinery & parts (Power & Auto-looms) were being exported to several countries like, Bangladesh, Sri-Lanka and some of the African and gulf countries.

Our textile engineering industry was not in equilibrium with our textile industry, both in quantitative and qualitative terms. Pakistan was a big name in textile production but stands nowhere in the world when it comes to textile machinery/parts manufacturing. To survive in the future, this gap needs to be bridged as fast as possible.

2.3 Cluster Statistics

Number of Textile Machinery and Spare Parts units in Faisalabad								
Sr.#	**Industry Group**	**Registered**	**Non-Registered**	**Number of Units**				
				Small	**Medium**	**Large**	**No Data**	**Total**
1	Textile Machinery	23	31	22	13	7	12	54
2	Textile Spare Parts	31	241	205	29	8	30	272
Total		**54**	**272**	**227**	**42**	**15**	**42**	**326**

Directorate of Industries 2002, Punjab
Industrial Census PSIC, 2005

Trade Data

Faisalabad	US $ (Million)
Export of Textile Machinery	1.37
Export of Textile Spare Parts	0.27
Import of Textile Machinery	151.83
Import of Textile Spare Parts	56.33

Faisalabad Textile Engineering (Spare Parts) Cluster Contribution to GDP =US $ 300 Million

Source: PRAL 2004

Trade Partners

Major Importing Countries	Major exporting Countries
U S A	Bangladesh
Germany	Sri-Lanka
Italy	South African Countries
Sweden	
England	
Switzerland	
China	

Source: PRAL 2004

2.4 Cluster Issues

- **Technical Constraints**
  - Conventional working methods. 98% machines & tools including lathe machines , shapers , cutters were obsolete in cluster
  - Systems were labor intensive.
  - No know-how about latest production methods.
- **Marketing Constraints**
  - Only 2% manufacturers were participating in international fairs & Exhibitions of textile machinery and parts
  - Lack of information about neighboring countries markets for textile parts like China, India and Bangladesh
  - Used to old and conventional marketing techniques
  - Inconsistent supply of quality raw material e.g. pig iron , mild steel , cast iron
  - Unawareness of any quality controls and standards ; only 2% units had ISO certification in the cluster

- Absence of local web site, brand name, Products advertisements.
- Absence of business development services.
- Absences of networking and linkage amongst stakeholders

➢ **Human Resources Constraints**

- Lack of educated, certified and professionally trained / skilled workforce.2% units had qualified engineers in the cluster.
- Lack of coordination between technical institutions and manufacturers
- No training or skill development centre / institute / facilities for textile spare parts manufacturing.
- Qualified engineers unwilling to work for this sector due to worse working environment.

➢ **Financial Constraints**

- Lack of formal financial assistance, being an unorganized sector. Banks do not consider textile machinery and parts sector as potential sector for investment.

➢ **Regulatory Constraints**

- 5% - 25% import duty on raw materials, machinery and equipments used in the textile parts production, and used textile machinery / parts, were duty free & without sales tax

3. CLUSTER ACTORS

3.1 Core Cluster Actors

1) Assemblers

There were nearly 11 local assemblers, as they were not very specialized in assembling. They used the parts/ components manufactured by the vendors and/or the imported parts/ components/ intermediary goods, to build up the finish product.

2) Vendors

The vendors were specialized in the production of one or more parts/ components. This segment of the cluster was very important, as most of the manufacturing activity was actually performed by them. The number of vendors in the cluster was estimated to be more than 500.

3) Manufacturers

There were nearly 300 manufacturing units catering to low-end domestic market. Almost 90% textile spare parts were manufactured and assembled in-house.

3.2 Other Cluster Actors

There were a number of other persons who contribute to the activities of the cluster and thus play an important role. They can be classified as follows:

Raw Material Suppliers

Most of the raw material suppliers were present in the Faisalabad city, where their number was estimated to be more than 60. The material they supply, reach to them via different sources that include the imported material, locally processed material (Pakistan Steel Mill products) and scrap (local and/ or imported). Most of the importers reside out of Faisalabad. Hence, the raw material suppliers in the cluster were mostly the retailers of the imported material or they were dealers of the Pakistan Steel Mill.

Machine Manufacturers

The number of machine manufacturers used in manufacturing of textile parts were present in the cluster was estimated to be more than 30. Often the machine manufacturers of Lahore (a nearby big city) were contacted. The machine manufacturers also provide the other services like technical consultancy and machine repairing etc.

Machinery Importers

Most of the machine importers reside in the nearby city of Lahore, whereas, only 10 of them reside in the cluster. There was huge gap between the technologies level of the cluster and the world; so, most of the discarded machines from the 1st world countries were imported as scrape. These machines were prepared for production locally. The big players also get the benefit of using the imported scraped machines, but they sometimes bother to import the new machines as well.

Freight Services Providers

The freight services providers were responsible for shifting the products, within and outside the cluster. There were nearly 35 freight forwarding agencies providing countrywide services.

Traders

The manufactured goods were sold to the traders within the city and out of the city (country-wide). Each manufacturing concern had its own relationship with the dealers of the different areas of the country. The terms of sale and services were different between each manufacturer and trader.

Exporters

The exporters received the trade leads from the international market and cater the orders, from the goods manufactured in the cluster. Some big players (manufacturers) export directly (nearly 10), while others had to rely on the (free lance) exporters.

3.3 Supports groups & Associations

Faisalabad Foundry & Engineering Industries Group (FFEIG)

Faisalabad Foundry & Engineering Industries Group (FFEIG) was the single group that representative of engineering industry of the cluster including textile machinery and spare parts sector. Its membership consisted of 165 members, which was very low as compared to total strength of engineering industry of cluster. Only 5% textile machinery

and spare parts manufacturers were members of this group. This group was also the representative of the Textile Machinery & Parts Cluster. This was not a registered group/association, that's why, had not any status or voice officially. It had only local representation without any specific agenda or objective for the development of engineering industry of cluster. Most of its members were agriculture machinery and tools manufacturers and it mainly looks after the interests of this group. Most of its energy was directed towards settling disputes between different engineering groups. It had also not enough to show on the side of skill development in the area.

Faisalabad Chamber of Commerce & Industry (FCCI)

Faisalabad Chamber of Commerce & Industry (FCCI) had advocated the collective opinion, concern and aspiration of the private sector. It was the main trade body, which had a great say in the policy matters with the Government. FCCI serves as bridge between the private sector and the Government. FCCI used to tackle efficiently various problems of trade; export development, industrialization and foreign investment. FCCI recently restructuring its different departments in order to make chamber more competitive to globalization challenges. All other associations were registered in this forum. FCCI and trade associations were representatives from trade community. Their role in development of SMEs was not satisfactory but it can play better role for the development of SMEs because they knew better what these wanted.

4. Institutions Role

4.1 Current Institutional Matrix:

The cluster had no any active support/service institutions to guide it in the right direction. The local representative body namely Faisalabad Foundry & Engineering Industry Group (FFEIG) did not have any developmental agenda and served the purpose of resolving conflicts among various entrepreneurs. The following institutions were present in the cluster but there contribution in development of textile spare parts sector was very nominal.

- Technical Education & Vocational Training Authority (TEVTA)
- Small & Medium Enterprise Development Authority (SMEDA)
- Punjab Small Industries Corporation (PSIC)
- Export Promotion Bureau (EPB)
- Commercial Banks

- **Technical Education and Vocational Training Authority (TEVTA)**

  Technical Education and Vocational Training Authority was managing nearly 400 different technical, commercial and vocational training institutes through out the province. In Faisalabad, the two important institutes of TEVTA include Government College of Technology (GCT) and Govt. Apprenticeship Training Center (GATC).

The objectives of this organization include the provision of the up-to-date training facilities to the technical staff and the trainers to improve the efficiency of the available human resources.

Currently the TEVTA was striving to upgrade the courses and the training programmes according to the need of the industry. But the problem faced by this institute in its way to achieve its objectives was the weak linkages with the industry.

TEVTA was actively coordinating cluster development activities in clusters for alignment of their institutes on existing and potential requirement of clusters

- **Small and Medium Enterprise Development Authority (SMEDA)**

Small and Medium Enterprise Development Authority had been working for the growth of the SME sector in Pakistan. Their major areas of working were the SME policy, business consultancy, marketing, legal and advisory services. SMEDA regional business coordinator was sitting in FCCI as SMEDA help desk for SME's in faisalabad. SMEDA prepared a paper for joint venture on textile machinery but no progress on its implementation. SMEDA was supporting cluster development programme in Punjab

- **Punjab Small Industries Corporation (PSIC)**

Punjab Small Industries Corporation (PSIC) had done a marvelous job in promoting the industrial culture in the province. PSIC was providing different valuable services to the industry since 1972. These services

included the loaning facilities and the development small industrial estates throughout the province.

The small industrial estates developed by this organization count 20, besides three Export Promotion Zones established in Sialkot, Faisalabad and Gujranwala. This organization also facilitate the artisans by providing them the marketing facilities at 4 different Pakistan Handicraft Shops, located at tourism likely places in Punjab, e.g. Murree, Lahore International Airport, etc. Some training centers and common facilities centers were also developed by this organization, which were no further under its management.

This organization also used to provide different financial packages to the small industrial projects, at very competitive rate, i.e. Rs. 1,768.93 million had been dispersed in the form of loan packages of Rs. 0.1 million to Rs. 0.75 million, provided to the projects within the cost range of Rs. 0.2 million to Rs. 1.5 million since 1983.

PSIC had taken an initiative for development of this ignore cluster on industry in Faisalabad with collaboration of UNIDO & SMEDA.

- **Export Promotion Bureau (EPB)**

The Export Promotion Bureau being one of the active institutes in Pakistan, was providing numerous services related to utilization and increase of the local export potential.

The objectives of this institution include the increase in the exports of the countries, by strengthening of the position in the existing markets, exploring and penetrating new markets. This organization was very

active in exploring the new markets and promoting the exporters to hold strong position in the existing markets, by conducting seminars, sponsoring international trade delegations, arranging the international trade fairs, etc.

The records can witness the willingness of this institution for the SME growth, which shows it among the first batch of the institutions in the country, which practically started with the UNIDO Cluster Development Approach. They were still involved in nearly 12 different SME clusters in Karachi, Lahore and other cities.

- **Banks**

Almost all the registered commercial and industrial development banks of Pakistan had their branches in the cluster. They had a very weak link with the SMEs.

Although nearly all the enterprises, enjoys the leverage of having their accounts in more than one bank. But the banker-customer relationship was not so strong. The banks were interested in financing the consumer products rather than issuing business loans. The banks blame the SMEs for the weak linkage, whereas the SMEs think same for the banks.

4.2 Institutes that can be linked with cluster

- **Pakistan Council of Scientific and Industrial Research (PCSIR)**

Pakistan Council of Scientific and Industrial Research (PCSIR) was a well-known institution, especially for the material testing labs. This council targets the industrial development via real time technical

problem solving and research. In Faisalabad, PCSIR had recently developed a Sample Collection Center in cluster for the collection of materials for testing.

- **Pakistan National Accreditation Council (PNAC)**

Pakistan National Accreditation Council (PNAC) an apex body established by Govt. of Pakistan under administrative control of Ministry of Science and Technology had been formed for the accreditation Certification bodies, ISO 62, ISO 66; Accreditation of testing and calibration labs and product certification bodies. It also deals with the registration of Auditor and Training in the relevant fields. This organization can play a vital role by providing consultancy for the capacity building of the local industry regarding the international standards and compliances.

- **National Productivity Organization (NPO)**

National Productivity Organization (NPO) was one of the departments of Ministry of Science and Technology (MOST), working for the improvement of the industrial sector with the following objectives:

  - Provide an accurate & comparable database
  - To record current best practices and methodologies
  - Provide information and assistance regarding internationally compatible products
  - Enhance institutional capacities of SME

- Deliverance of regular productivity & performance reports to MOI & P

- **Technology Up-gradation and Skill Development Company (TUSDC)**

Technology Up-gradation and Skill Development Company (TUSDC) was the department of Ministry of Industries, working for the development of the industrial sector, targeting the following areas:

- To promote and/or establish Technology Up-gradation Centers (TUCs) and/or Skill Development Centers (SDCs) by establishing/providing common facility, design, support and/or maintenance, testing, certification, incubation, applied research, dissemination centers and/or any other institution deemed necessary for up-gradation/ assimilation/ streamlining/acquiring technology;
- Up-gradation and/or transfer of technology in industrial sector.
- To merge, bifurcate, sub-divide, outsource, lease, gift or sell existing or established TUCs or SDCs;
- To encourage and guide industrial enterprises to up-grade technology by conducting/holding seminars, workshops, conferences, exhibitions etc.
- To provide a linking mechanism for better and efficient co-ordination between Small and Medium Enterprises (SMEs) and to guide them for development and up-gradation of new technology

- To propose to the government/semi government/non-governmental organizations to take up steps for improvement of their respective industrial organizations
- To create supporting environment and establish managerial system and operational mechanism fit for optimum development, streamlining / enhancing production, reducing overheads / cost of business and bringing local industry in consonance with international standards

The link of this institute with the local industry can help a lot in the terms of increase in the productivity of the current systems and technological up-gradations.

TUSDEC was also conducted seminar for making CAD / CAM center in Faisalabad.

5. Cluster Analysis

5.1 SWOT ANALYSIS

- **STRENGTH**
- Large number of entrepreneurs; 300 small and medium units in cluster
- Textile Spare Parts Manufacturers were Providing services to more than 4000 textile units and add Rs.10 billion in the economy
- Large local demand and strong presence in local market with expanding market share.
- Locally manufactured textile machinery and parts was being exported to several gulf and African countries

- Approximately more than 10,000 direct or indirect employees were involved with this industry
- All units were self employed
- More than 5 public and 11 private technical institutions in cluster
- **WEAKNESSES**
  - No long term vision or policy
  - No tie-up with well known global companies (Registered vender of well known companies)
  - Lack of Marketing support for product –advertisements , brand name , web site , Portal
  - Absence of membership in any trading bloc
  - Lack of coordination with support agencies
  - No benchmarking, no use of new technology
  - Competition at international level on quality standards
  - Lack of standardization and quality control , only 2% units had ISO certification
  - Unskilled labor , only 5% workers had certificate / diploma from technical / training institutions
  - No interest in research and development
  - High rate of utility charges and tax regulations
  - Export was nominal
  - Uncertain as well as non availability of right type of basic raw materials e.g. pig-iron , cast iron , steel and its alloys
  - Lack of formal financial assistance due to an un-organized sector

- Isolated and non registered units
- Unable to gain local buyers confidence

➢ **OPPORTUNITIES**

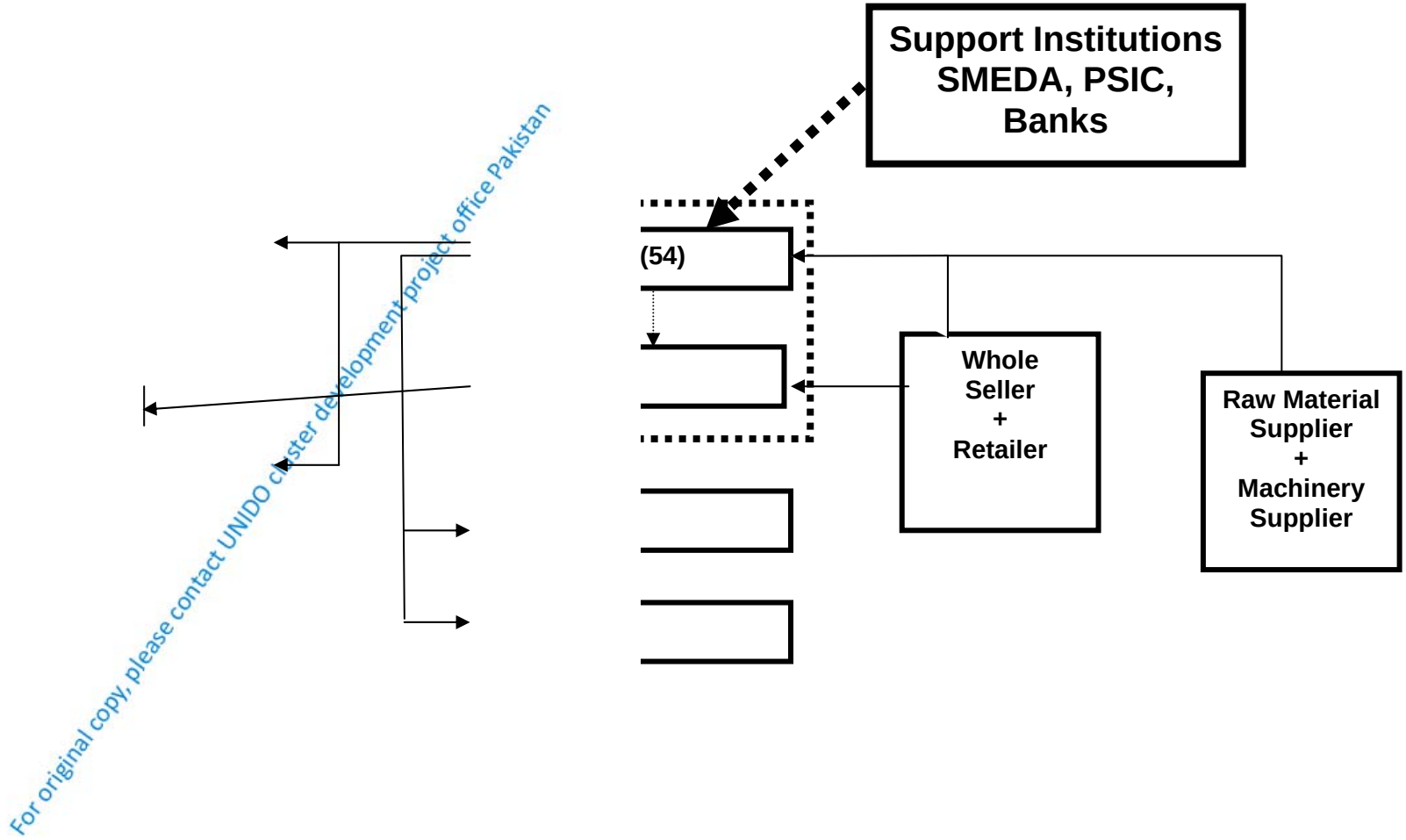
- Size of local market was more than US $ 300 million and capture only US $ 100 million
- SAFTA agreement among SAARC countries ; SAARC was a more than US$ 2 billion market of textile spares.
- New and unexplored markets
- Globalization and free trade
- Access to new marketing information and skills

➢ **THREATS**

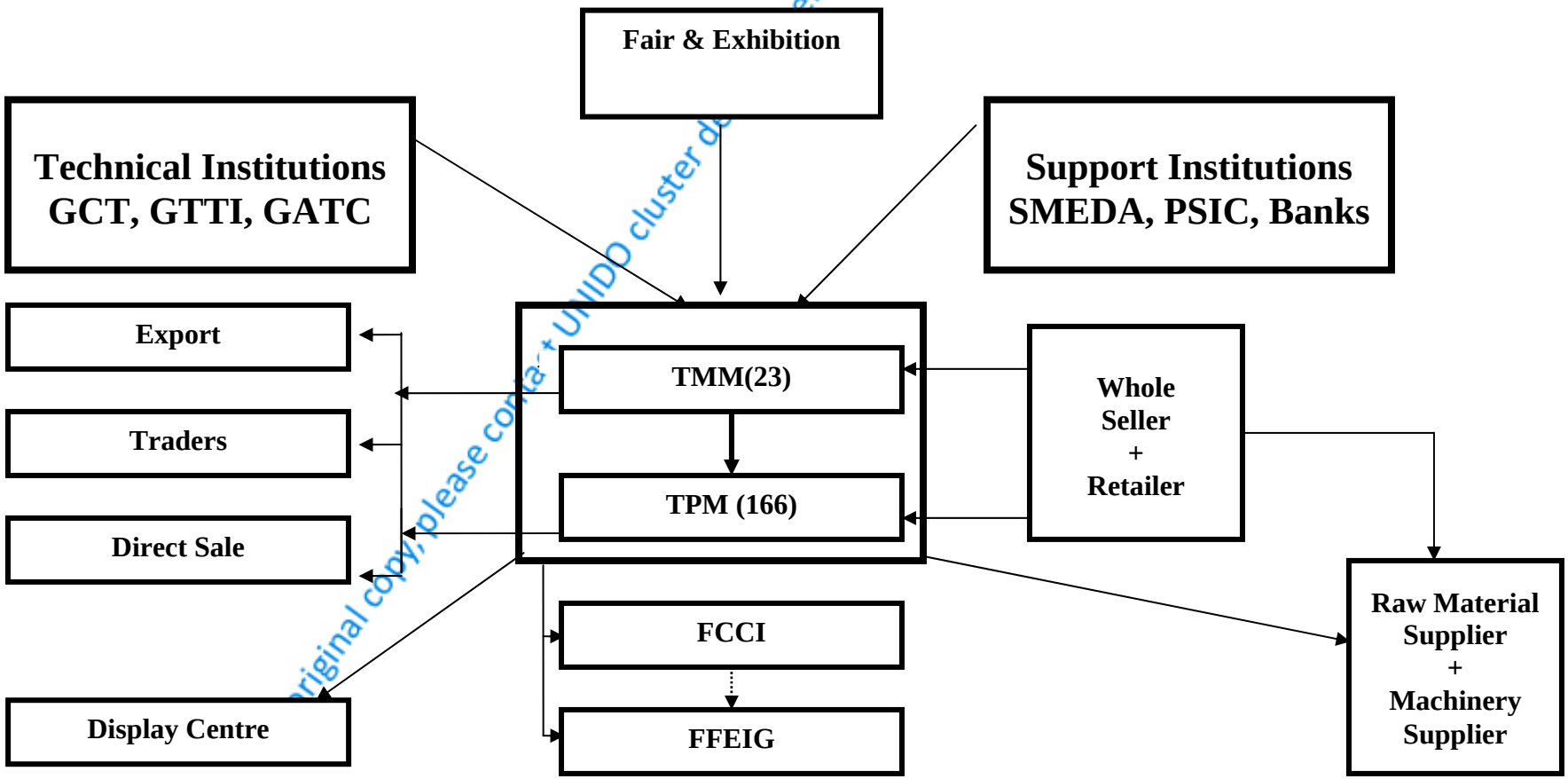
- Competitors textile engineering products with the advantage of large engineering sector in this region were China and India
- Competition with international manufacturing expertise
- Smuggling from China , India and Taiwan
- Uncertainty in inputs costs
- High dependence on single supplier of raw material i.e. Pakistan steel
- WTO regime and globalization

5.2 Current and future cluster maps

CURRENT CLUSTER MAP



FUTURE CLUSTER MAP



6. Vision:

To make Faisalabad nationally self-reliant and globally recognized cluster in textile spare parts manufacturing by the year 2010.

Having visited, on one hand, most of the composite textile units in the cluster using latest textile machinery and parts and textile units using local textile machinery and parts, on the other hand, having seen most of the private sector textile engineering works in cluster, the writer had the fair idea of the gap in terms of technology, equipment, automation, quality control, standardization and general perceptions about the basic pre-requisites of quality engineering. At the same time, the feeling that we were about three decades late in looking into this matter, but however, our manufacturers had the potential to fill this gap.

6.2 The Strategy

Main feature of the strategy to be followed were:

- An Association of Textile Machinery & Parts Manufacturers (ATMPM) be initiated in the cluster in order to develop a social capital for the cluster, to bring local manufacturers of textile equipment under one fold. ATMPM will not only work closely with the government for solving problems faced by its members, but also removing unhealthy competition amongst its members, promoting standardization and ISO certification, employing qualified and well-educated staff, adapting quality control systems and improving managerial skills.

- Common high-tech engineering services center (Cluster Development Center for Textile Spare Parts) with collaboration of SMEDA having advance facilities be urgently established in the cluster to help local manufacturers avail of the modern techniques in order to raise the standard of their products to the international level.
- For Capacity building of the local manufacturers, it was also planned that a small resource centre would be set up in the cluster and this would initiate as a common place for having meetings, consultation of literature relevant to their business, serve as a place for small classroom type of trainings whenever required. Over a period, as the sense of ownership for such a centre would develop in the cluster actors, they would be motivated to stock it up with the requisite type of infrastructure and support staff so that efficient BDS can be obtained by all the cluster actors from this centre. The sustenance of this Resource Centre (RC) would be further ensured by involvement of various support institutions that in future would be able to pass on their interventions from this centre to all the receptive clients.
- Achieving 30% skilled labors in manufacturing units from the present level of approximately 5%, through alignment of technical institutions according to existing and potential requirements of the cluster i.e. GCT, GTTI, GATC

- Brand image of Faisalabad-made textile machinery & parts would be entrenched deeply in the minds of the consumer through regular meeting among different stakeholders and by conducting workshop & seminars. A permanent exhibition center for **"Textile Machinery & Parts-Made in Faisalabad"** may be established in Cluster, open to the domestic buyers of textile machinery & parts round the year with special weeks for the international buyers.
- Development of a common website for 'FSD-made textile engineering products' to attract the attention of the oversees buyers.

6.3 On going activities

- Sensitization of the relevant cluster actors
- Capacity building of entrepreneurs in the areas such as Finance, Quality Production, Waste management, Marketing & product development etc.
- Networking and trust building in clusters
- Joint participations in the trade fairs and exhibitions
- Strengthen associations & institutions capacity building
- Establishment of trade/business consortium, raw material consortium
- Validation, prioritization of action plan/sub projects
- Establishment of business support centers
- Implementation of pilot projects based on diagnostic studies

Sensitization, Capacity Building, Networking, and Trusting Building were the On-going processes.

Tentative Action Plan of Textile Spare Parts Cluster, Faisalabad for the year 2005-2006

Sr.#	Activities	Time Period	Total Developmental Expenditure (Rs.)				Implementer	Beneficiary	Expected Outcomes
			Agency (PSIC)	Networks	Support Institutions	Total			
1	Three workshops i) Networking & Trust Building ii) Production Process iii)Quality issues	Q1-Q3	10,000	6,000	14,000 (FCCI / SMEDA / SME Bank)	30,000	CDA	All Stakeholders	Capacity building of all stakeholders Enhanced capacity utilization & better know how of latest manufacturing processes Better quality control
2	Creation of 3 R & D / Marketing networks of small units (6-8 members each)	Q1-Q4	6,000	9,000	9,000	24,000	Networks	Principle firm	Increased sharing of knowledge & best practices and collective learning Base for common initiatives

3	At least 2 joint ventures between Networks and Technical institutions on R & D i.e. GCT, GTTI	Q3-Q4	4,000	30,000	6,000	40,000	Networks	Networks	Strength linkages of industry and Technical institutions
4	Launch at least two customized training courses in GCT	Q2-Q4	5,000	50,000	20,000	75,000	Training Institute / FCCI		Skilled workforce for industry

5	Feasibility plan for cluster development centre	Q1-Q2	10,000	2,000	5,000	17,000	CDA	All Stakeholders	Improved Standard & Quality of Products by provision of CFC