

Balochistan's Skills Gap and CPEC Job Potential: A Human Capital Assessment

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EXECUTIVE SUMMARY

- China-Pakistan Economic Corridor (CPEC) has been credited as the biggest infrastructure project in Pakistan, and it has created significant jobs in the country and yet, despite the presence of Gwadar Port and other portions of the Western Route, Balochistan has received only a small share of the economic and employment gains.
- The current evidence that is available indicates that even though Pakistani workers constitute the majority of the workforce in CPEC projects, local involvement in Balochistan is limited to low-skilled and informal employment while skilled and technical roles are mostly occupied by non-local and foreign workers.
- The gradual nature of the operationalization of Special Economic Zones additionally constrains local consumption of labor. With the approved SEZs, few of them have gone past the planning stage and industrialization and employment are minimal, especially in Balochistan.
- The critical limitation is the harsh and multi-sectoral skills shortage in a lack of skilled workers in mining, construction, port operations, energy, and industrial trades, in addition to poor TVET institutions, low enrollment, low female participation, and industry connections.
- The skills gap is not limited to CPEC-related industries; it is all-encompassing, in the agricultural sector, the water sector, renewable energy, minerals, and even health, which means that the problem of Balochistan is not project-specific, but structural and indicative of a larger problem in the human capital ecosystem.
- In conclusion, the study finds that CPEC presents opportunities, but Balochistan is not adequately positioned to take advantage. Devoid of focused, industry-oriented human capital, enhanced TVET, and local-hiring, the province will continue to be a transit region, but not an ad-hoc recipient of national development, enhancing regional inequalities and restricting the comprehensive influence of CPEC.

China Pakistan Economic Corridor (CPEC) is the biggest infrastructure and connectivity project in Pakistan, and it is largely projected to contribute to the creation of employment opportunities and development of the region. Although, Gwadar Port and parts of Western Route are in Balochistan, the province received only a limited share of employment gains from CPEC. Though, national estimates have shown that the participation of the local population in CPEC projects has led to significant job creation in various projects, available sources indicated that local participation in the project has been almost limited to low-skill jobs, with skilled and technical jobs mainly occupied by non-local or foreign residents. Survey-weighted household data also reveal that CPEC core and extended industries are disproportionately defined by low levels of education, high levels of youth concentration, and high dependence on informal wage-employment, which makes the local population unable to acquire skilled CPEC-related jobs. The knowledge brief evaluates the level to which the current human capital capacities in Balochistan serve the labor demand in the CPEC-related sectors. The analysis indicates chronic skills shortages in the mining, construction, port, logistics, and emerging industrial sectors, which is characteristic of weak links in the systems of technical and vocational education and training (TVET), industry connectivity, and slow operationalization of Special Economic Zones (SEZs). Such limitations are also enhanced by poor flow of information and lack of organized local hiring systems. The statistics show that infrastructure expenditure by itself cannot produce inclusive employment results. Devoid of organizational, industry appropriate skills training and enhanced institutional capacity, Balochistan will remain as a transit area instead of being an actor of CPEC-based industrialization. These human capital gaps need to be filled to have equitable regional development and to achieve the long-term economic promise of CPEC.

INTRODUCTION

CPEC, entails massive investments in transportation, energy, ports and industrial infrastructure in Pakistan. Within this, Balochistan is strategically located with Gwadar Port, the Western Route, and few Special Economic Zones (SEZs). Regardless of such geographic and strategic centrality, CPEC has so far secured few employment benefits in the province, especially in the skilled and technical sectors (Kaur & Malhi, 2023).

Availability of human capital rather than infrastructure is the main limitation to Balochistan. According to the CPEC-related projects, there are ongoing gaps in the local labor force, where there are insufficient technicians, machine operators, electricians, logistics staff, port workers and, mining professionals (Shah et al., 2017). In line with results of surveys indicating that the CPEC industries are dominated by youth, low education and informal jobs (PBS, 2025), skilled and semi-skilled jobs are often filled by workers in other provinces or foreign workers, and the locals are highly concentrated in low and informal jobs (Abbas & Rasool, 2021). The trends indicate that there have been chronic flaws in technical and vocational education and training (TVET) systems such as institutional coverage, obsolete curriculums, and poor responsiveness to industry demands (Muhammad & Ahmed, 2024).

This Knowledge Brief discusses why the workforce in Balochistan has not been incorporated into the job opportunities that are linked to the CPEC and what institutional and structural processes influence this situation. The brief presents a synthesis of the available evidence on the demand in labor, skills gaps, training capacity to create a picture of how local workers can better benefit through CPEC driven growth and help to have a more inclusive regional development.

CONCEPTUAL EXPLANATIONS OF LOCAL EXCLUSION FROM CPEC JOBS

The lack of involvement of Balochistan in CPEC employment can be best understood using three complementary theories. Human Capital Theory suggests that regions with low levels of education and skill levels are unable to take advantage of the new investments (Siddiq et al., 2021); this is reflected by the low level of human capital in Balochistan. Skills Mismatch Theory describes this coexistence between local unemployment and vacancies, CPEC needs technicians, operators, and engineers that the province cannot provide and, thus, employ non-local or Chinese workers (Abbas & Rasool, 2021). Institutional economics further explains that weak provincial capacity and low bargaining power do not help Balochistan attain training pipeline and local hiring systems (Saleem, 2017). All these frameworks demonstrate that strategic infrastructure cannot create broad-based employment without effective skills, industries and institutions. These conceptual explanations align with recent household survey evidence, which shows that populations residing in CPEC core and extended industries exhibit systematically lower human capital and higher informal employment than the national average.

REVIEW OF EMPIRICAL EVIDENCE ON CPEC JOB GENERATION AND SKILLS GAP

Empirical studies indicate that CPEC has created numerous employment opportunities in Pakistan, but the allocation of the opportunities demonstrates a high level of regional and skill-based disparities. Initial CPEC projects generated approximately 52000 jobs in the construction, energy and transport sectors. Approximately 90 percent of labor employed in road projects was Pakistani, but these laborers were all pooled in low-skilled positions indicating low technical advancement opportunities (Zia et al., 2018). To the contrary, Chinese or non-local employees occupied most engineering, electrical, mechanical, and project-management positions in energy projects, which proves the preference of employers towards technically trained workers that were able to match the specifications of the project (Abbas & Rasool, 2021).

Research, however; cautions that merely the presence of jobs does not in itself ensure the involvement of the local population particularly in those provinces where the training ecosystem is weak (Shah et al., 2017). Studies on Balochistan discover that despite the need of electricians, welders, machine operators, surveyors, port handlers and marine technicians in CPEC, the provincial workforce is deficient in the mentioned skills leading to excessive reliance on workers from other provinces and China (Saleem, 2017). It is evident that even though the development of ports and the construction of free zones have generated employment in logistics and services, almost all the jobs that require skills, crane operation, cargo handling and marine engineering, shipping documentation, are occupied by non-local employees (Achakzai et al., 2023).

SOCIOECONOMIC PROFILE OF CPEC CORE AND EXTENDED INDUSTRIES

To complement sectoral and project-level studies, this brief draws on microdata from the Labor Force Survey (LFS) 2024-25, which provides nationally representative information on employment characteristics, including a detailed major industry variable. Using this variable, two variables were further constructed: CPEC core industries and CPEC extended industries.

CPEC core industries capture sectors directly linked to CPEC infrastructure and connectivity. These include construction activities (construction of buildings, roads, railways, and utility projects), energy and utilities (electric power generation and transmission, gas distribution, steam and air-conditioning supply), and transport and logistics (road freight transport, passenger transport, storage, and transportation support services). These sectors represent the immediate infrastructure and operational footprint of CPEC. CPEC extended industries capture indirect and supply-side spillovers of CPEC activity. These mainly include wholesale and retail trade, vehicle sales and repair, fuel retail, food and consumer goods retail, and other market-facing services that expand due to increased construction demand, mobility, and economic integration generated by CPEC.

All descriptive results in this study are based on survey-weighted cross-tabulations using the official LFS population weights. These weights are used to make sure the results accurately represent the actual labor force, not just the people who happened to be included in the survey sample. Applying survey weights corrects for differences in how individuals are selected across provinces, industries, and demographic groups. As a result, the figures reflect population-level employment patterns rather than raw sample counts.

Table 1 Educational Composition of Population in CPEC Core and Extended Industries

Education Level	CPEC Core (%)	CPEC Extended (%)
No formal education	16.7	9.5
Primary–Middle	21.6–23.6	23.2–25.1
Matric–Intermediate	14.7 - 18.5	19.8 - 20.7
BS / BE	11.8	11.2
MA / MSc and above	5.5	10.3

Source: Author’s calculations using Pakistan Bureau of Statistics, Labour Force Survey 2024–25.

As indicated in Table 1, workers that are low to middle-educated dominate employment in CPEC core industries. The highest level of participation is recorded in people who have primary and middle school education, and the percentage of representation reduces drastically as the higher education level is attained. The proportion of workers with tertiary education in the most important sectors of CPEC is significantly lower than in high-skilled industrial operations, which means that there is a mismatch between the skills intensity needed to perform higher-value activities and the level of education of the current workforce in those sectors.

Table 2 Youth Concentration by CPEC Exposure

Age Group	CPEC Core (%)	CPEC Extended (%)
Youth (15–29)	20.9	16.5
Age 30+	15.9	14.8

Source: Author’s calculations using Pakistan Bureau of Statistics, Labour Force Survey 2024–25.

Table 2 reveals that there is high concentration of youth employment in CPEC core as well as extended industries with youth participation particularly high in core CPEC sector. This demographic distribution places pressure on sectoral labor absorption and escalates the danger that infrastructure-based growth may become youth underemployment or precarious work instead of sustainable work except with accompanied investments in skills formation and employability. The results highlight the significance of the harmonization of CPEC-related industrial development and human capital and training processes, which are youth-oriented.

Table 3 Informal Employment by CPEC Exposure

Employment Status	CPEC Core (%)	CPEC Extended (%)
Employee	16.1	40.4
Informal	21.2	17.1

Source: Author’s calculations using Pakistan Bureau of Statistics, Labour Force Survey 2024–25.

Table 3 shows that employment in CPEC core and extended industries is heavily skewed toward informal arrangements, with informality particularly pronounced in extended CPEC industries where informal wage employment is dominant. This pattern indicates that while CPEC-related activity is absorbing labor, it is doing so primarily through low-security and low-productivity jobs rather than stable formal employment. High informality is also noted in central CPEC industries, and this indicates that even those industries with direct infrastructure connections have poor ability to create formal employment and long-term skill upgrading.

Overall, the data points to the fact that CPEC-associated core and extended industries are entrenched in a labor context that is marked by the low human-capital levels, high presence of young employees, and significant dependence on informal jobs. Although, infrastructure investment in CPEC has boosted economic operation in these sectors, the nature of workforce has limited the ability to transform the economic activity into skilled, secure and stable jobs. Consequently, the employment outcomes related to CPEC in Baluchistan have not been balanced and mostly focused on low quality and temporal jobs. These trends can be used to understand why inclusive employment has not been a result of large-scale infrastructure investment in the CPEC-exposed industries. The spread of CPEC-associated initiatives without simultaneous investments in skill development, building institutional capacity, and formalization of the labor market poses a risk that can strengthen the existing production mode but not alter it. These limitations are thus one of the factors that need to be addressed to exploit the labor force in Balochistan through CPEC.

SKILLS GAP PATTERNS IN BALOCHISTAN

Empirical evidence from both the (Shah et al., 2017) and (Zaib & Seel, 2025) gives a uniform view of an unprepared labor force structure in Balochistan. The province has just 11 technical institutes and 124 vocational centers which is not sufficient training network compared with the emerging industrial and CPEC-linked workforce demands. Enrolment is still very male dominated and the training institutes for females are overcrowded with student-instructors ratio of 1:18 in technical and 1: 24 in vocational institutions indicating that the instructional capacity is low. Because of this, almost half (49.3 percent) of the skilled labor force of Balochistan is working in the informal sector, and only 12.1 percent of the population have undergone formal training in TVET, mostly in short-term courses instead of diploma level or higher education.

These shortcomings directly translate into low sectoral alignment: the majority of those receiving training work are in the manufacturing and shipbreaking industries, whereas priority CPEC industries, including the mining and construction industries, account for only 2.5 percent of the skilled workforce in the province. Employer surveys also show that 46 percent of the labor demand needs certificate-level training, and an even greater number, 40 percent needs short-course skills, which are not provided sufficiently by the existing system. The level of evidence shows the magnitude of these shortages at the sector level. According to 2017 statistics in Table 4, in mining, which has the worst shortage of 61 percent, attributed to the missing drillers, machine operators, surveyors, blasting technicians, and mineral processing workers despite the abundance of resources in the province and complete integration with CPEC logistics corridors. Fisheries, which is at the center of the Gwadar coastal economy, suffer a deficit of 52 percent especially in net-making, cold-chain management, marine mechanics, and coastal logistics, which are important in the operations at the ports. The shortage of 44 percent caused by a lack of welders, electricians, plumbers, masons, equipment operators, and safety-compliance workers recorded by the construction in the initial period of construction by CPEC is what led to the dependence of non-local labor.

Table 4 Summary of Skills and Labor Gaps in Balochistan

Sectors	Total Skill Demand	Sector Skill Deficiency
Manufacturing	6,402	31%
Shipbreaking	2,460	-
Construction	2,070	44%
Services	1,675	25%
Mining	680	61%
Fisheries	455	52%

Source: NAVTTC Balochistan Skills Gap Assessment (Shah et al., 2017)

Table 5 Sector Workforce Demand in Balochistan 2025

Sectors	Workforce Demand
Allied Health	15,018
Renewable Energy	13,052
Construction	11,213
Hospitality & Tourism	9,379

Source Labor Market Assessment in Balochistan (Zaib & Seel, 2025)

The most recent figures in table 5 indicate that the sector labor demand has grown exponentially since 2017. The manufacturing demand has been growing between 6,402 to 20, 421 and this implies that there are increased needs of industrialization that are involved in the SEZs like Bostan and Gwadar. Virtually nonexistent in the 2017 analysis, renewable energy employs 13,052 workers currently, as the company moves to the renewable projects of solar and wind infrastructure in its energy portfolio. The construction demand has increased to 11,213 which is much higher than the base of 2,070 at NAVTTC, which is an indication of continuous development of infrastructure. Hospitality and tourism are also facing an increasing demand (9,379 workers), which is in line with the fact that Gwadar is turning into a service and logistical centres (Zaib & Seel, 2025).

Table 6 broadens the analysis beyond CPEC-specific sectors and highlights systemic skill shortages across the foundational economic domains of Balochistan. Agriculture and water management, central to rural livelihoods, lack capacities in precision farming, irrigation engineering, groundwater monitoring, and hydrological modeling, limiting productivity in drought-prone districts. One of the new CPEC-related industries is renewable energy, where there are fewer than five training centers and less than 20 percent of the workforce is certified, which highlights a lack of technical preparedness. The mineral industry with large deposits is still limited by unproductivity and the old regulatory systems which limit modernization and value-added methods. The infrastructure of TVET is also inadequate: despite the number of 151 institutions, the total enrollment rate is less than five percent of the national share and women representation is less than 34 percent, which is an indication of continuing accessibility and equity hurdles. Loopholes in the health sector also make human development even more difficult, as the density of physicians remains critically low, while maternal mortality rates remain high, and the coverage of preventive care indicates that the sector struggles with acute shortages in clinical and allied-health competencies. Collectively, these indicators demonstrate that Balochistan’s workforce deficits extend far beyond CPEC industries and reflect deeper structural human capital constraints that continue to impede sustainable provincial development.

Table 6 Sectoral Indicators, Skills Needs, and District Relevance

Sector	Indicator / Observation	Skills Needed	Key Districts
Agriculture	70–80% rural household engagement; yields 0.8–1.2 tons/ha; 40–50% irrigation coverage	Agronomy, mechanization, precision agriculture, soil testing, irrigation maintenance	Kalat, Zhob, Lasbela, Chagai
Water	DTW: 10–91m; EC/TDS fresh <1.5 dS/m with hotspots; recharge ~10.7 MAF	Groundwater monitoring, GIS mapping, environmental testing, water-use planning	Quetta, Mastung, Khuzdar, Zhob, Pishin
Renewable Energy	<5 training centers; <20% certified workforce; emerging CPEC investment	Solar/wind diagnostics, energy efficiency, project management	Quetta, Gwadar, Turbat
Minerals	412M tons copper/gold; low efficiency; outdated regulation	Advanced mining, automation, safety management, compliance	Chagai, Kharan, Loralai
TVET	151 institutions; <5% national enrolment; <34% female participation	Curriculum reform, CBT, renewable energy, ICT, flexible training	Quetta, Lasbela, Zhob
Health	Limited rural coverage; <1 physician per 10,000; high maternal mortality; low immunization	Clinical skills, midwifery, facility management, public health mobilization	Quetta, Turbat, Nushki, rural districts

Source: Labor Market Assessment in Balochistan (Zaib & Seel, 2025)

KNOWLEDGE GAPS IN THE LITERATURE

Although, several studies have examined on the economic potential of CPEC, a knowledge gap exists on the role of Balochistan in the labor market of CPEC. First, the prediction of skills sector-wise is lacking. Although, the shortages (including a 61% mining skills shortage are reported), there is no research on future needs in Gwadar Port, SEZs, fisheries processing, ship repair, and renewable energy (Shah, Zaib, et al., 2017). Third, the studies do not shed much light on the employment practice of firms, and even though the reliance on non-local labor is observed, there exists no systematic data on what the employers find constrained or preferring (Abbas & Rasool, 2021). Fourth, there are few studies on the effectiveness of TVET training, few assessments has been made on whether current programmes enhance the employability, and placement or the relevance of the skills (Magsi, 2016). Finally, literature does not have a long-term perspective; most of the studies are concerned with early harvest projects and fail to capture the long-term effects, transfer of skills, and labor market changes as SEZs develop.

IMPLICATIONS FOR POLICY AND PRACTICE

The evidence of the CPEC studies has several implications on the possibilities of enhancing employment opportunities of the Balochistan workforce. To begin with, the fact that local workers are mostly placed in low-skilled jobs implies that the ability of CPEC to create more jobs will not result in local labor if the province does not have more technical skills. Empirical research demonstrates that locals hold most of the unskilled jobs and that the skilled jobs are held by the non-local work force. It suggests that the future benefits of SEZs, port logistics and energy initiatives depend on the will of the local workforce (Zia & Waqar, 2018).

The reported 61 percent shortage of skilled labor in the mining industry implies that the high economic potential sectors in Balochistan will not be developed until the skills base in the province matches the needs of the industry. It means that unless the industry has industry-specific training pipelines, CPEC investments in mining, minerals, and upstream logistics will still be based on foreign labor instead of on the local workforce (Shah et al., 2017). The trends of preference of experienced and technically certified employees in the other provinces by the employers suggest that the local TVET institutions should be more aligned with the competency requirements of the CPEC companies. The very fact that the contractors regularly seek trained workers from other provinces, or China indicates that to make the local workforce competitive, institutional credibility and changes in training systems might be required (Abbas & Rasool, 2021).

There is some evidence that there is not much awareness amongst local workers about job opportunities and skills demand which means that the information flow is a significant bottleneck in the labor market of Balochistan. Research pointing to informational asymmetries and poor recruitment channels implies that the opportunities of CPEC will be unavailable until clear and predictable ways of communication (Saleem, 2017). Moreover, the absence of women in CPEC-related labor datasets implies that gendered patterns of exclusion may persist unless skill development strategies deliberately account for women's entry points into administrative, ICT, hospitality, or service-sector roles linked with Gwadar and SEZs. The current lack of gender-disaggregated evidence further underscores this gap.

The multi-sectoral nature of the skills crisis also implies that localized human capital development cannot rely solely on CPEC-linked training. Precision agriculture, irrigation engineering capacity, groundwater monitoring, hydrological competence, solar and wind technicians, mining modernization and regulatory competence, and health sector clinical and allied-health training is needed to manage the severe workforce shortages. It is necessary to fill these cross-sector gaps to ensure inclusive and sustainable provincial development. Finally, the extensive institutional environment and low provincial capacity, low bargaining power and inconsistent HRD structures imply that the Balochistan province will only be a passive outlet unless it develops sustained human capital outlets. Scholars believe that the success of CPEC requires simultaneous investment in human resources development, unless Pakistan develops skills and institutional capacity along with infrastructure, the potential of the corridor will be unable to be fully achieved (Siddiq et al., 2021).

POLICY RECOMMENDATIONS

- **Industry-linked training pipelines:** Develop targeted training programs for SEZs, port operations, mining, and energy projects in Balochistan, tailored to specific occupational needs rather than general skill development.
- **Strengthening TVET institutions:** Upgrade TVET institutions to competency-based standards and foster stronger linkages with employers to enhance certification credibility and ensure local workers are competitive for skilled and technical roles.
- **Evidence-based labor alignment:** Conduct a comprehensive study to assess current and emerging occupational demand in CPEC-related sectors. Use the findings to align TVET curricula with actual labor market needs, improving employment outcomes for local workers.

CONCLUSION

This Knowledge Brief shows that on the one hand, the China-Pakistan Economic Corridor has generated a considerable volume of economic activity and job opportunities in the country in general, on the other hand, Balochistan has been mostly marginalized in the higher-value gains of employment. The province is a home to the strategically important assets including Gwadar Port, the Western Route, and the special economic zones but the workforce has failed to obtain skilled and technical jobs associated with CPEC. It has been established that local participation is heavily skewed on the low skilled and informal jobs as the more productive jobs are occupied by inter provincial or foreign workers. This exclusion is structural in essence as opposed to project specific. The weak capacity of local workforce to be employed is greatly hampered by persistent human capital deficits, which are in the form of low educational attainment, poor technical and vocational education and training systems, low industry linkages and weak information flows. Survey-weighted data also indicates that CPEC-related industries are represented by a high level of youth concentration and informality, which increases strains on labor markets without bringing about an equivalent change in job quality or stability. The gradual operationalization of SEZs and the lack of systematic systems of local hiring have also decreased the potential of infrastructure investment to lead to inclusive employment results. More importantly, skills mismatch in Balochistan is far greater than what is associated with CPEC. The failure of the human capital ecosystems in the province has a deeper aspect of the inadequacy of agriculture, water management, renewable energy, minerals, and health. These findings

highlight that infrastructure-based development cannot bring equitable development outcomes. CPEC will merely be used to recreate the inequalities present in the region rather than relieve it unless they plan to invest in skills building, institutional reinforcement and adjustment of the labor market. To make Baluchistan a transit route for an active participant in the country's development, the development of human capital should be considered as one of the main points of CPEC strategy. Those training systems which are to be aligned with the industry need, credibility of TVET and the intentional integration of non-white and women workers to tap the long-term and inclusive economic potential of the corridor.

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