High Tech and Innovative Emerging Industries and Pakistan's Policies and Regulations towards Adaptation in the light of China's Strategies of Reverse Engineering

Syed Ahmed Farhan Shan [1], Sajid Khan [2], Shah Nawaz Khan [3], Sardar Bahadar Khan [4]

Dr Muqeem ul Islam [5]

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Abstract:

The evolution of innovation dates back to ancient civilizations and continues to shape modern economies through high-tech advancements. Reverse engineering—a process of deconstructing and enhancing technologies—has been instrumental in industrial growth worldwide, notably in countries like China and Japan. Pakistan's potential in leveraging reverse engineering remains underutilized, hindered by outdated infrastructure, inadequate R&D investments, weak institutional frameworks, and fragmented policies. Initiatives like STZs and the Digital Pakistan Policy offer promise but suffer from misaligned execution. This study underscores the transformative potential of reverse engineering in Pakistan's defense, agriculture, pharmaceuticals, and renewable energy sectors. By fostering academia-industry-government collaboration, improving infrastructure, and adopting global best practices, Pakistan can bridge its technological gaps, enhance export competitiveness, and reduce its import dependency. A robust reverse engineering strategy will catalyze innovation, strengthen industrial output, and pave the way for long-term economic sustainability and self-reliance.

Key words: *Reverse engineering, innovation, economic sustainability, high-tech industries Pakistan*

[1] *Pakistan Audit & Accounts Service Government of Pakistan, Email: safh592@gmail.com*
[2] *Office Management Group Government of Pakistan, Email: murtazamahsud@gmail.com*
[3] *M/o Railways Government of Pakistan, Email: nawaznhre16@gmail.com*
[4] *Provincial Management Service KP, Email: sardarbahadar82@gmail.com*
[5] *Chief Instructor, National Institute of Public Administration, Peshawar, Email: muqeemci@nipapeshawar.gov.pk*

Introduction

The roots of innovation trace back to ancient civilizations where foundational engineering principles were applied to construct marvels like the pyramids of Egypt and the aqueducts of Rome. These early advancements laid the groundwork for the Industrial Revolution, a period that transformed economies through mechanization, mass production, and global trade. In the modern era, high-tech and innovative industries have taken center stage, driving technological advancement, economic growth, and global competitiveness. A key enabler of this transformation has been reverse engineering, a strategic process of deconstructing technologies to understand, replicate, and enhance them. In many industries, reverse engineering is not only a tool for creating competitive advantages but also an avenue for improving upon existing technologies and creating new solutions that would have been difficult to achieve otherwise.

Reverse engineering has proven to be a game-changer for countries like China and Japan, enabling them to bridge technological gaps and establish dominance in key sectors. China, for example, has leveraged reverse engineering to rapidly develop indigenous capabilities in defense, semiconductors, renewable energy, and telecommunications. Initiatives like "Made in China 2025" have institutionalized reverse engineering as a cornerstone of their industrial strategy, backed by government subsidies, state-sponsored R&D, and technology-sharing agreements (Chow, 2002; National Bureau of Statistics of China, 2024). Chinese firms like LONGi Solar adapted German solar panel designs to lead the global renewable energy market, while the Chengdu Aircraft Corporation reverse-engineered Russian aircraft technologies to develop platforms like the JF-17 Thunder (Rodrik, 2004). These efforts have significantly reduced China's reliance on foreign imports and bolstered its global competitiveness.

Similarly, Japan employed reverse engineering to rebuild its industrial base after World War II. Automakers like Toyota and Nissan studied American manufacturing techniques, introducing innovations such as Kaizen and lean production to outperform their Western counterparts (Watanabe, 1995). In electronics, Sony reverse-engineered U.S. tape recorders, refining the designs to produce superior products that gained global acclaim (Shih, 1996). Supported by the Ministry of International Trade and Industry (MITI), Japan's focus on precision, quality, and incremental innovation transformed it into a technological powerhouse (Kobayashi, 1995).

For Pakistan, reverse engineering holds immense potential to address critical economic and technological challenges. The country's high import

bill, which stood at a staggering $54.73 billion in FY 2023-24, highlights its heavy dependence on foreign technologies and products.

Sectors such as defense manufacturing, pharmaceuticals, agriculture, renewable energy, IT, textiles, and e-commerce are ripe for transformation through reverse engineering (ProPK Staff, 2024). By localizing production and adapting foreign technologies, Pakistan can reduce its reliance on costly imports, enhance export competitiveness, and drive sustainable economic growth.

Industries like defense and aerospace, spearheaded by institutions such as the Pakistan Aeronautical Complex (PAC) Kamra and the Pakistan Ordnance Factories (POF) Wah, already possess the technical expertise to adopt reverse engineering on a larger scale. The pharmaceutical sector can replicate generic medicines and biosimilars to meet local and international demands (PCSIR, 2022). In agriculture, precision farming tools and hybrid seeds, inspired by Chinese and Japanese models, can revolutionize productivity. Similarly, the renewable energy sector can leverage reverse engineering to localize the production of solar panels and wind turbines, reducing energy import costs (Vox, 2024). The textiles, agricultural machinery, sports, electronics and surgical instruments industries, concentrated in the Golden Triangle region (Sialkot, Faisalabad, Gujranwala), can also benefit from reverse engineering to modernize production techniques and compete globally.

By integrating reverse engineering into its national strategy and fostering collaboration between academia, industry, and government, Pakistan can not only revolutionize its industrial base but also create a robust ecosystem for innovation. Drawing lessons from China and Japan, Pakistan has the opportunity to lay the foundation for long-term economic sustainability, technological self-reliance, and global competitiveness.

The industrial sector is a major contributor to Pakistan's GDP. Large-scale manufacturing is considered the backbone of an economy. However, Pakistan’s industrial development has not been very impressive over the last two decades compared to other countries in South Asia. There is no single overarching national policy to steer the process of industrialization. This warrants an in-depth analysis of the industrial sector's performance to evaluate policy gaps and recommend the best policy options in light of regional best practices.

Statement of the Problem

It is a fact that Pakistan’s hi-tech and innovative industries are underperforming, despite the country’s significant potential of reverse

engineering. While recent initiatives like the "Digital Pakistan Vision" and the establishment of Special Technology Zones Authority (STZA) aim to promote hi-tech industries.

However, there are concerns about the effectiveness of these policies in promoting local industry on the lines of reverse engineering China model. Therefore, this situation necessitates a critical evaluation of Pakistan's industrial landscape, focusing on the potential of reverse engineering to revolutionize local industries in the light of China reverse engineering strategies, reduce import dependence, and foster innovation.

Scope

This study critically analyzes the state of Pakistan's high-tech and innovative industries, focusing on key sectors such as information technology, defense manufacturing, pharmaceuticals, agriculture, renewable energy, and textiles. It evaluates the potential of reverse engineering to localize production, reduce import dependence, and drive innovation while examining Pakistan's legal, institutional, and policy frameworks, including the STZA Act and PCSIR Act, to identify gaps and recommend reforms. Drawing on successful reverse engineering models from China and Japan, the research employs the Blavatnik School of Government's Oxford Index of Public Administration for a comparative GAP analysis, highlighting deficiencies in R&D investment, policy coherence, and industry-academia collaboration. The study proposes actionable strategies to enhance Pakistan's global competitiveness, achieve technological self-reliance, and foster sustainable industrial growth.

Research Methodology

This study employs a mixed-methods approach, combining qualitative and quantitative methods, to analyze Pakistan's hi-tech and innovative industries with a focus on reverse engineering. The qualitative aspect involves case studies and comparative analyses of strategies from China and Japan to identify lessons for Pakistan, emphasizing sectors like IT, defense manufacturing, pharmaceuticals, agriculture, renewable energy, and textiles. Primary data, including interviews with policymakers, industry professionals, and researchers, as well as a field visit to PCSIR Peshawar, is used to assess reverse engineering projects and ongoing R&D activities, complemented by a review of legal and institutional frameworks such as the STZA Act, PCSIR Act, and Digital Pakistan Vision. Quantitative analysis includes evaluating sectoral contributions to GDP, import bills, and export performance through government reports and industry studies. GAP

analysis, guided by the Blavatnik School's Oxford Index, highlights deficiencies in governance and delivery mechanisms, while a SWOT-EETH analysis examines organizations like PCSIR, PAC Kamra, and POF Wah to develop actionable strategies.

The study also integrates situational analysis and draws on primary and secondary data sources to evaluate the state and preparedness of Pakistan's hi-tech industries, offering actionable recommendations to leverage reverse engineering for industrial growth and reduced import dependency.

Situational analysis

Hi-tech and innovative industry of Pakistan

Pakistan's high-tech and innovative industries encompass sectors such as Information Technology (IT), telecommunications, e-commerce, fintech, renewable energy, pharmaceuticals, textiles, agriculture, and defense manufacturing. A situational analysis of these sectors reveals their current status, capacity, preparedness, and contributions to national economic development.

Current Status

IT Sector: Pakistan's IT industry has experienced significant growth, with IT and IT-enabled services (ITeS) export remittances reaching an all-time high of $3.223 billion in the fiscal year 2023-24, marking a 24% increase from the previous year (ProPK Staff, 2024). The country is also ranked among the top five freelancing nations globally, reflecting its strong presence in the international IT market (Kashif, 2022).

Telecommunications: The sector boasts over 190 million mobile subscribers and 124 million broadband users, contributing to its robustness. In the fiscal year 2023-24, telecommunications revenues amounted to PKR 955 billion, underscoring its significant role in the economy (PO Staff, 2024).

E-commerce: The e-commerce market in Pakistan is projected to grow to $5.91 billion by 2025, driven by platforms like Daraz and increasing consumer trust in digital transactions (Board of Investment). This growth is indicative of the expanding digital economy in the country.

Fintech: The digital payments market is expected to reach $19.34 billion by 2025, with companies like Easypaisa and JazzCash leading efforts in financial inclusion (Board of Investment). Visa has also announced plans to increase digital payment adoption in Pakistan tenfold over the next three years, partnering with local entities to enhance the digital payment infrastructure (Reuters, 2024).

Pharmaceuticals: Contributing approximately 1.2% to GDP, the pharmaceutical sector comprises over 750 manufacturing units focusing on generic medicines and exports to more than 50 countries (Pakistan Council of Scientific & Industrial Research [PCSIR], 2022).

The Government established the Cannabis Control and Regulatory Authority (CCRA) to oversee licensing and regulation of both hemp and marijuana sectors to allow commercial cultivation of hemp reflects Pakistan strategic move to tap into the Global Cannabis Market. In this regard, the PCSIR is currently working to find other avenues for its productivity in medicinal and textile sector. However, challenges remain in meeting international compliance standards to expand export potential.

Textiles and Apparel: Accounting for 60% of exports and employing about 15 million people, the textile sector is undergoing modernization through automation and digital manufacturing to enhance competitiveness (Pakistan & Gulf Economist, 2022). Despite these efforts, high energy costs and outdated machinery continue to pose challenges.

Renewable Energy: Renewable energy sources currently account for over 35% of Pakistan's energy mix, with a national goal to achieve 60% by 2030 (Vox, 2024). Recent developments include significant investments in solar energy, with Pakistan becoming one of the world's largest importers of Chinese solar panels between 2020 and 2023, adding substantial capacity to the national grid (Vox, 2024).

Defense Manufacturing and Reverse Engineering: Institutions such as the Pakistan Ordnance Factories (POF) in Wah, Pakistan Aeronautical Complex (PAC) in Kamra, and the National Radio Telecommunication Corporation (NRTC) play pivotal roles in defense production and reverse engineering. PAC Kamra, for instance, has capabilities in reverse engineering and additive manufacturing of aircraft parts, contributing to self-reliance in defense technology (Pakistan Aeronautical Complex, n.d.). Additionally, cities like Sialkot and Gujranwala are known for their industrial expertise, with Sialkot being a hub for manufacturing and exporting sports goods and surgical instruments, often utilizing reverse engineering techniques to enhance product development (Rest of World, 2022).

Agricultural Base: Agriculture accounts for 19-20% of GDP and employs 38-40% of the workforce. It underpins key industries, including textiles (cotton) and food processing (wheat, rice, and sugarcane). The industry produces over 50,000 tractors annually, supporting mechanization in agriculture. Companies like Millat Tractors Ltd. (Massey Ferguson) and Al-Ghazi Tractors (New Holland) dominate the market. Tractors and spare parts are exported to Africa, the Middle East, and South Asia, earning valuable foreign exchange.

Capacity

Human Resources: Pakistan's youthful population, with 64% under the age of 30, provides a dynamic and adaptable workforce (Kashif, 2022).

The IT sector employs approximately 300,000 professionals, with around 25,000 IT graduates entering the workforce annually (Kashif, 2022). This influx supports the growing demand for skilled labor in the tech industry.

Infrastructure: The establishment of Special Technology Zones (STZs) aims to create a conducive environment for technology companies (Board of Investment). These zones offer incentives to attract both local and foreign investments, fostering innovation and economic growth. Additionally, the government has initiated projects to enhance digital infrastructure, including expanding broadband access to underserved areas (Board of Investment).

Research and Development (R&D): Investment in R&D remains below 1% of GDP, indicating a need for increased funding to drive innovation (PCSIR, 2022). Strengthening industry-academia collaboration is essential to bridge the gap between research and marketable products (PCSIR, 2022). In the defense sector, organizations like PAC Kamra engage in reverse engineering to develop indigenous capabilities, reducing dependence on foreign technology (Pakistan Aeronautical Complex, n.d.).

Preparedness

Government Initiatives: Policies such as the Digital Pakistan Policy and the establishment of the Special Technology Zones Authority (STZA) demonstrate the government's commitment to fostering a technology-driven future (Board of Investment). These initiatives aim to create a thriving digital ecosystem through investment in infrastructure, skills development, and regulatory support (Board of Investment, n.d.). In the defense sector, the government's focus on self-reliance has led to the promotion of reverse engineering practices to develop indigenous defense technologies (Ministry of Defense Production, 2021).

Cybersecurity and Education: Efforts are underway to enhance cybersecurity measures and promote STEM education (Board of Investment). Programs like the Presidential Initiative for Artificial Intelligence and Computing (PIAIC) aim to equip the youth with skills in

emerging technologies, preparing them for the evolving job market (Board of Investment, n.d.). Workshops and training sessions, such as the Reverse Engineering 101 Workshop by BSides Pakistan, are being organized to build capacity in specialized fields (CSO Pakistan, 2024).

Output and Contribution to National Economic Development

The national economy benefits significantly from diverse sectors, each contributing to growth and development. The high-tech industry accounts for approximately 1% of GDP, with significant potential for expansion (Pakistan & Gulf Economist, 2022). The IT and freelancing sectors generate substantial foreign exchange and create employment, integrating the country into the global digital economy. The telecommunications industry contributed PKR 335 billion to the national treasury in FY 2023-24, highlighting its role in economic development. Textiles, comprising 60% of exports and employing around 15 million people, remain the backbone of the export economy, while the pharmaceutical sector enhances healthcare access and contributes to export earnings. The e-commerce and fintech industries drive consumer spending, promote financial inclusion, and create jobs, supporting socio-economic progress. Meanwhile, renewable energy now forms over 35% of the energy mix, bolstering energy security and reducing dependence on fossil fuels, in line with global sustainability efforts.

Hi-tech and innovative industry of China

The Hi-tech and innovative industries are pivotal to economic growth, fostering technological advancement, enhancing productivity, and driving global competitiveness. China has established itself as a global leader in this sector through strategic investments, policy initiatives, and infrastructure development. In contrast, Pakistan faces considerable challenges, including limited investment, inadequate infrastructure, and a lack of coherent policy frameworks. This analysis examines China's capacity, preparedness, and output in the hi-tech sector, its impact on economic development, and provides a comparative assessment with Pakistan to highlight critical gaps and growth opportunities.

China's Capacity

Policy and Investment: China's commitment to high-tech industries is evident through strong policy support and investment. Fixed-asset investment in high-tech industries increased by 10% in the first three quarters of 2024, with high-tech manufacturing and services growing by 9.4% and 11.4%, respectively (National Bureau of Statistics of China, 2024). Initiatives like "Made in China 2025" and the 14th Five-Year Plan have been instrumental in driving this growth.

Talent Pool and Infrastructure: Annually, China produces approximately 1.5 million STEM graduates, ensuring a steady stream of skilled professionals. Innovation hubs like the Guangdong–Hong Kong–Macao Greater Bay Area and Zhongruan lead in research and development. Advanced technologies such as precision farming, AI-driven pest control, and IoT monitoring are widely adopted in agriculture, while the textile sector incorporates IoT, AI, and automation for smart manufacturing.

Tech Preparedness and Global Standing: Ranked 11th in the Global Innovation Index 2024, China demonstrates excellence in semiconductor production, achieving 7nm chip technology despite external restrictions. It leads global AI research, contributing 25% of publications in 2023, and has advanced aerospace capabilities, exemplified by the Tiangong Space Station and Chang'e lunar missions.

Preparedness

Comprehensive national policies prioritize the development of artificial intelligence (AI), semiconductors, and green energy to drive innovation and align with broader economic goals. Sustained investment in STEM education ensures a steady supply of skilled professionals to support these critical industries. Additionally, well-funded research centers and specialized industrial clusters provide the infrastructure needed to accelerate technological advancements and scale production, fostering global competitiveness and sustainable growth.

Output

Industrial Performance: High-tech manufacturing grew by 8.7% in H1 2024, with notable contributions from new energy vehicles (14%), integrated circuits (11%), and service robots (20%). Agriculture benefits from autonomous machinery, while textiles leverage smart manufacturing for global competitiveness.

Economic Contribution: Hi-tech industries contribute 15% to GDP, with exports accounting for 33% of total exports. Manufacturing profits rose by 6.3% year-on-year in Q3 2024 (Global Times, 2024).

Digital Economy: Valued at $7 trillion in 2024, the digital economy contributes over 40% of GDP.

Comparison with Pakistan; Capacity

Policy and Investment: Pakistan's investment in high-tech industries is minimal, with R&D expenditure at only 0.3% of GDP. The "Digital Pakistan Vision" lacks alignment with innovation goals.

Talent Pool and Infrastructure: STEM graduates make up 25% of the graduate pool, and brain drain exacerbates the talent shortage.

Innovation hubs, like the Islamabad Software Technology Park, are underfunded and limited in scale. Agriculture and textiles rely on outdated technologies with minimal innovation.

Tech Preparedness and Global Standing: Ranked 87th in the Global Innovation Index 2024, Pakistan heavily depends on imports for semiconductors and green technologies, with negligible contributions to global AI research or advanced manufacturing.

Preparedness

Policy Deficiencies: A significant barrier to the growth of high-tech industries is the lack of long-term strategies and clear direction for their development. Without comprehensive, forward-thinking policies, progress in advancing technological innovation is impeded. This absence of strategic planning limits the ability to cultivate and support high-tech sectors effectively, hindering national progress in the global technology arena.

Talent Shortage: There is a critical shortage of skilled professionals in the technology sector, driven by a limited emphasis on STEM (Science, Technology, Engineering, and Mathematics) education. The existing educational framework does not sufficiently foster the development of high-tech talent, and the poor retention of these professionals further exacerbates the problem. As a result, industries are left without the expertise necessary to drive technological innovation and growth.

Infrastructure Gaps: The lack of adequate funding and development in research and development (R&D) facilities and industrial setups severely limits the potential for innovation. Underfunded infrastructure results in insufficient resources for scientists, engineers, and innovators to explore new technologies, conduct experiments, and develop breakthrough solutions. This deficiency in infrastructure ultimately restricts the overall progress and competitiveness of high-tech sectors.

Sectoral Misalignment: There is a clear misalignment between key sectors, such as agriculture and textiles, and the technological advancements needed to foster high-tech growth. These sectors have not integrated modern technological solutions into their operations, which leaves them less prepared for the demands and opportunities of high-tech industries. The absence of technological integration in these traditional sectors reduces their ability to evolve and grow in alignment with global technological advancements.

Output

Industrial Performance: Traditional sectors dominate, with minimal contributions from high-tech industries. Agriculture remains labor-intensive, and the textile industry lacks innovation in high-value segments.

Economic Contribution: High-tech industries contribute less than 1% to GDP. Exports are primarily traditional, dominated by textiles and agriculture, reflecting low profitability due to outdated practices.

Digital Economy: Valued at $4 billion, the digital economy contributes less than 1% of GDP, despite initiatives under the China-Pakistan Economic Corridor (CPEC).

Reverse Engineering

Reverse engineering is the process of analyzing a system, product, or object to understand its design, architecture, components, and functionality. This process is often undertaken to reproduce, improve, or integrate the system into other applications. It involves deconstructing a product to discover how it works, identifying potential improvements, or developing similar products without directly copying proprietary designs. Developing nations such as China and Japan have effectively leveraged reverse engineering, technology transfer, and strategic government support to establish competitive industries. Pakistan can adopt similar strategies to accelerate innovation and foster self-reliance and economic development across key sectors.

Flowchart of Reverse Engineering Process

Step 1: Identification of the target product or system**.**
Step 2: Disassembly or deconstruction to analyze components.
Step 3: Documentation of design, architecture, and functionality.
Step 4: Evaluation of findings to identify improvements.
Step 5: Development of an improved or compatible system.
Step 6: Testing and integration into market or production systems.

China's Reverse Engineering Approach

Automotive Sector

Strategy: Joint ventures with foreign automakers (e.g., Volkswagen and GM) allowed firms like BYD and Geely to access advanced technology (Rodrik, 2004).

Example: BYD initially reverse-engineered battery technologies and later innovated in electric vehicles.

Government Role: Enforced technology-sharing agreements for market access (Chow, 2002).

Electronics

Strategy: Leveraged intellectual property via reverse engineering in semiconductors and telecommunications (Shih, 1996).

Example: Huawei studied foreign telecom technologies and developed advanced solutions.

Government Role: Offered subsidies for R&D and protected local firms from foreign competition (Chow, 2002).

Information Technology

Strategy: Promoted domestic giants like Tencent and Alibaba by initially mimicking Western platforms (e.g., Facebook, Amazon) (Chow, 2002).

Example: Alibaba reverse-engineered e-commerce solutions for local markets.

Government Role: Policies like the Great Firewall shielded local firms from foreign competition (Rodrik, 2004).

Pharmaceuticals

Strategy: Reverse-engineered patented drugs to develop generics and biosimilars (Rodrik, 2004).

Example: Sinovac used reverse engineering to enter the vaccine market.

Government Role: Permitted copying under weak IP laws, transitioning to stricter compliance later (World Bank, 1993).

Renewable Energy

Strategy: Reverse-engineered solar panel technologies from German firms, leading to firms like LONGi and Trina Solar dominating the global market (World Bank, 1993).

Government Role: Provided low-interest loans and export subsidies (Chow, 2002).

Defense and Aerospace

Strategy: Reverse-engineered Russian and U.S. technologies for military sectors (Rodrik, 2004).

Example: Chengdu Aircraft Corporation reverse-engineered Soviet aircraft to produce the JF-17 Thunder with Pakistan.

Government Role: Directed centralized military R&D with substantial state funding (Shih, 1996).

Agriculture

Strategy: Leveraged advanced farming techniques, hybrid seeds, and machinery developed through reverse engineering and collaborations.
Example: Yuan Longping High-Tech Agriculture Co. developed hybrid rice varieties to boost yields.
Government Role: Invested in research institutions and subsidized precision farming (World Bank, 1993).

Japan's Reverse Engineering Approach

Automotive Sector

Strategy: After WWII, Toyota and Nissan reverse-engineered U.S. car models, enhancing efficiency and reliability (Watanabe, 1995).
Example: Toyota's Kaizen model originated by analyzing Ford's production methods.
Government Role: MITI (Ministry of International Trade and Industry) provided R&D subsidies and policy support (Kobayashi, 1995).

Electronics

Strategy: Reverse-engineered Western technologies in consumer electronics (Watanabe, 1995).
Example: Sony reverse-engineered U.S. tape recorder technologies.
Government Role: Promoted the Quality Control Movement and facilitated research collaborations (Kobayashi, 1995).

Information Technology

Strategy: Focused on precision engineering and computing technologies (Watanabe, 1995).
Example: Fujitsu reverse-engineered IBM systems to develop localized solutions.
Government Role: Sponsored the Fifth Generation Computer Systems Project (Kobayashi, 1995).

Pharmaceuticals

Strategy: Replicated and improved Western pharmaceuticals (Shih, 1996).
Example: Takeda reverse-engineered insulin production methods.
Government Role: Supported pharmaceutical R&D through healthcare reforms (Kobayashi, 1995).

Renewable Energy

Strategy: Reverse-engineered renewable technologies, optimizing for local conditions (Watanabe, 1995).

Example: Sharp became a leader in solar technology by improving Western designs.
Government Role: Subsidized R&D and incentivized innovation (Kobayashi, 1995).

Defense and Aerospace

Strategy: Reverse-engineered U.S. defense technologies for dual-use applications (Kobayashi, 1995).
Example: Mitsubishi Heavy Industries reverse-engineered fighter jets to develop civilian aircraft like the MRJ.
Government Role: Collaborated under security agreements with the U.S. (Watanabe, 1995).

Agriculture

Strategy: Mechanization and high-yield crops by studying U.S. agricultural models.
Example: Kubota Corporation developed advanced machinery for Japan's small-scale farms.
Government Role: Provided R&D subsidies and promoted efficient water usage (Kobayashi, 1995).

Lessons for Pakistan

The automotive sector in Pakistan can achieve significant growth by establishing joint ventures with global automakers, enforcing local content requirements, and promoting local innovation. Companies like Pak Suzuki and other car companies should be encouraged to go beyond merely assembling kits and invest in local research and development (R&D). Similarly, the electronics industry requires the development of tech clusters and the strengthening of institutions such as PAC Kamra and NRTC for advancements in avionics and consumer electronics. Strong industry-academia linkages, involving universities like NUST, GIKI, and PAF-IAST, are vital to fostering innovation.

In the information technology sector, firms like NETSOL can be encouraged to reverse-engineer enterprise solutions, while fiscal incentives should be provided to boost exports and nurture local talent. For pharmaceuticals, companies such as Searle and Ferozsons should focus on reverse-engineering generic medicines under TRIPS-compliant frameworks, alongside developing biosimilar production capabilities.

The renewable energy sector holds immense potential for growth through partnerships with Chinese firms for technology transfer in solar and wind energy. Local companies like the Pakistan Renewable Energy Company can be incentivized to replicate and adapt these technologies to local needs. In defense and aerospace, collaboration with institutions like PAC Kamra and NESCOM should be expanded to focus on dual-use technologies, especially in UAV and avionics development.

The agriculture sector can benefit greatly from adopting mechanization and precision farming techniques inspired by Chinese and Japanese innovations. Local firms like Millat Tractors should be encouraged to develop advanced machinery and hybrid seeds. Subsidies and collaborations for efficient irrigation systems should also be established to improve productivity.

The Pakistan Council of Scientific and Industrial Research (PCSIR) plays a crucial role in advancing reverse engineering and innovation across multiple sectors. Its contributions include the development of hybrid inverters, 3D plastic components for PAC Kamra and POF Wah, spare parts, and agricultural drones. PCSIR Peshawar has pioneered advancements in seed modification and hydroponic agriculture through greenhouse research.

Inspired by the industrial success of China and Japan, PCSIR can focuses on technology transfer, creating innovation ecosystems, setting quality standards, and investing in human capital. By fostering public-private partnerships and enhancing R&D facilities, PCSIR is well-positioned to support industries like pharmaceuticals, renewable energy, and electronics, catering to both domestic and global markets.

The Golden Triangle region, comprising Sialkot, Faisalabad, and Gujranwala, serves as the backbone of Pakistan's industrial and export economy. It is a hub of innovation and reverse engineering, driving economic growth despite various challenges. By adopting reverse engineering models from countries like China and Japan, the region's industries can accelerate their development, enhancing competitiveness and fostering sustainable economic progress.

The local street-level industries in Pakistan possess significant potential for reverse engineering. Notably, the small arms and weapons reverse engineering industry in Dara Adam Khel, Khyber Pakhtunkhwa, is highly skilled and internationally renowned—albeit for its illegal yet thriving production of firearms, including pistols, machine guns, and rifles. The craftsmen in this region have mastered the replication of sophisticated, globally recognized weapons.

Similarly, the cutlery and dagger/knife manufacturing industry in Wazirabad is celebrated for its precision and exceptional quality. Gujranwala's local industries are also noteworthy, producing agricultural machinery such as ploughs, water pumps, harvesters, and irrigation systems. The city specializes in industrial tools, precision instruments, and machine parts, while also maintaining a robust steel and iron industry. Gujranwala is a leading producer of fans, air coolers, heaters, and related appliances.

These industries exemplify the potential of reverse engineering in Pakistan. However, their immense capabilities remain largely untapped and warrant further exploration to unlock their full potential.

Legal and Institutional framework of the hi-tech industry in Pakistan

The legal and regulatory framework for hi-tech and emerging industries in Pakistan has evolved to support technological innovation, digital transformation, and the growth of emerging sectors. These frameworks aim to create an enabling environment for technology-driven development by addressing critical aspects such as telecommunications, cybersecurity, e-commerce, and data protection. Below is an overview of the key legislative measures and their respective strengths, weaknesses, and potential areas for reform.

Legal and Regulatory Framework

The Special Technology Zones Authority (STZA) Act, 2021: The Special Technology Zones Authority (STZA) has been set up to develop a technology-driven knowledge ecosystem and encourage innovation and futuristic entrepreneurship. The framework offers a comprehensive range of incentives, including tax exemptions, special foreign exchange accounts, and exemption of customs duties on the import of capital goods. It also facilitates targeted investments through a one-window facility to streamline processes for investors. Profits and gains are exempt from tax for a period of 10 years under the Income Tax Ordinance, 2001. Additionally, the minimum turnover tax is also exempt for the same period. Customs duties, income tax, and sales tax on the import of capital goods are waived for 10 years under the Customs Act, 1969, Income Tax Ordinance, 2001, and Sales Tax Act, 1990. These incentives aim to attract global technology companies and foster an enabling environment for startups.

PCSIR Act, 1973: This Act provides for the establishment of the Pakistan Council of Scientific and Industrial Research (PCSIR) to undertake, promote, and guide scientific and technological research related to industrial problems in Pakistan. The council also supports the commercialization of research to enhance industrial productivity and exports.

SMEDA Act, 2017: This Act laid the foundation for SME Policy 2021, developed by the Small and Medium Enterprises Development Authority (SMEDA) to foster a business-friendly environment for SME growth. It focuses on improving SME access to finance, skills training, technology adoption, and market linkages.

Seed Act, 1976: This law regulates the quality of seeds for various plants and crops, ensuring agricultural productivity and sustainability through genetic engineering. It also facilitates seed certification, import, export, and sales regulation to ensure the availability of high-quality seeds in Pakistan.

NAVTTC Act, 2011: The National Vocational and Technical Training Commission (NAVTTC) was established to empower youth through education and vocational training, thus enhancing equal opportunities for employability. It develops and implements national skills strategies, promotes technical education, and aligns skill development programs with industry needs.

Plant Breeder's Rights Act, 2016: This law protects the intellectual property rights of plant breeders, encouraging the development of new plant varieties. It aims to improve food security, enhance the availability of high-

quality seeds, promote research and development in the agricultural sector, and support the production of genetically improved seed varieties.

Pakistan Telecommunication (Re-Organization) Act, 1996: This Act restructured the telecommunications sector by establishing the Pakistan Telecommunication Authority (PTA) to regulate services, promote competition, and protect consumer interests. It governs telecommunication service providers and ensures equitable access to telecom services for consumers.

Electronic Transactions Ordinance (ETO), 2002: This ordinance provides legal recognition to electronic documents, records, and digital signatures, thus facilitating e-commerce and digital transactions. It applies to a wide range of sectors, including the Ministry of Information Technology and Telecommunication (MoITT), State Bank of Pakistan (SBP), and financial and e-commerce entities.

Prevention of Electronic Crimes Act (PECA), 2016: This Act addresses cybercrimes by defining offenses such as unauthorized access, data breaches, cyberterrorism, and electronic fraud. It strengthens cybersecurity frameworks and is enforced by the Ministry of Interior, FIA Cybercrime Wing, and PTA to ensure secure digital interactions.

National Information Technology Board (NITB) Act, 2022: This Act formalizes the role of the National Information Technology Board (NITB) in overseeing e-governance initiatives, standardizing IT practices across government departments, and promoting digital transformation. It is applicable to federal and provincial government departments and public sector IT organizations, supporting Pakistan's transition to a digitally enabled economy.

Institutional Framework

A robust institutional framework supports Pakistan's ambitions in hi-tech and emerging Technology;

1. Intellectual property organization was established in 2005 to protect and strengthen of intellectual properties in respect of patent rights, copy rights and trademarks.
2. National Information Technology Board (NITB): Oversees e-governance initiatives and promotes digital transformation across public sector institutions.
3. Special Technology Zones Authority (STZA): Develops Special Technology Zones to attract investments and foster innovation.
4. Ministry of Information Technology and Telecommunication (MoITT): Provides strategic direction for the ICT sector and oversees policy formulation and implementation. The Pakistan Software Export Board (PSEB) is a government organization under the Ministry of Information Technology and Telecommunication (MoITT), tasked with promoting IT exports and facilitating the growth of Pakistan's software and IT-enabled services industry. It supports startups, freelancers, and companies through capacity-

building programs, IT parks, and international market access initiatives. The National Science and Technology Park (NSTP), established at NUST, Islamabad, is Pakistan's premier innovation and research hub, fostering collaboration between academia, industry, and government. It provides a platform for startups, tech companies, and R&D initiatives to drive innovation and commercialize indigenous technologies

5. Ignite National Technology Fund: Funds innovative technology projects and promotes entrepreneurship.
6. Federal Investigation Agency (FIA) Cybercrime Wing: Handles cybercrime enforcement under PECA.
7. State Bank of Pakistan (SBP): Facilitates digital payments and e-commerce through supportive financial policies.
8. Ministry of Science and Technology (Mo ST): Promotes research and development (R&D), innovation, and the commercialization of scientific advancements, acting as a key driver of technological progress in the country.
9. Higher Education Commission (HEC): Supports academic research, fosters university-industry collaborations, and funds initiatives to enhance R&D capacity in hi-tech fields.
10. Board of Investment (BoI): Facilitates foreign and domestic investments in technology sectors, streamlines regulatory approvals, and promotes Pakistan as a destination for hi-tech industries.
11. Securities and Exchange Commission of Pakistan (SECP): Regulates corporate activities, including those in the tech sector, and fosters innovation through initiatives such as regulatory sandboxes.
12. Competition Commission of Pakistan (CCP): Ensures fair competition and prevents anti-competitive practices in the tech industry, fostering a level playing field.
13. Pakistan Council for Scientific and Industrial Research (PCSIR): Focuses on scientific research and technological development, industrial growth, agriculture, promotion of indigenous innovation, research and development(R&D), renewable energy development and facilitation of reverse engineering (Pharmaceutical innovation, Agricultural high tech equipments, Textile, Energy, Defense and Heavy Industries Equipment).
14. National Radio and Telecommunication Corporation (NRTC): NRTC is a world class telecommunication and electronic equipment manufacturer.
15. Pakistan Ordnance Factory WAH (POF WAH): POF Wah is a Pakistan High Tech organization dealing with premier defence production.
16. Pakistan Aeronautical Complex Kamra (PAC KAMRA): PAC Kamra is major advance aerospace and defence organization responsible for design, development, production, maintenance and overhaul military aircraft and avionics system.

17. The Government established the Cannabis Control and Regulatory Authority (CCRA) in 2024 to oversee licensing and regulation of both hemp and marijuana sectors.
18. The Pakistan Industrial Technical Assistance Centre (PITAC) was established in 1962 through the merger of the Industrial Research and Development Centre (IRDC) and the Industrial Productivity Centre (IPC), operating under the administrative control of the Ministry of Industries, Government of Pakistan.

SWOT-EETH Analysis of Organizations and Institutions Driving Hi-Tech Industry Development in Pakistan

Organization	SWOT	EETH
PCSIR	**Strengths**: Extensive infrastructure for R&D and reverse engineering. Expertise in industrial and technological innovation across key sectors. Focus on renewable energy, defense, and industrial reverse engineering. **Weaknesses**: Insufficient funding and outdated technology in many facilities. Weak commercialization of R&D outcomes and limited private-sector collaboration. **Opportunities**: Potential to localize production and reduce reliance on imports through reverse engineering. Expansion into high-tech areas such as semiconductors and AI. **Threats**: Global competition in reverse engineering and innovation. Dependence on government funding with limited external investments.	**Eliminate**: Bureaucratic delays and inefficiencies in research approvals. **Enhance**: Infrastructure for high-tech labs and collaboration with private industry. **Threats**: Brain drain and reliance on imported technologies. **Hedge**: Establish partnerships with foreign R&D institutions to mitigate funding constraints and improve knowledge transfer.
STZA	**Strengths:** Legislative support for developing Special Technology Zones (STZs). Incentives for both domestic and foreign investments. Weaknesses: Delayed implementation of zones and infrastructure development. Limited capacity to integrate reverse engineering initiatives within STZs. **Opportunities:** Attracting global companies to establish R&D centers in Pakistan. Utilizing STZs as hubs for reverse engineering of advanced technologies. **Threats:** Political instability affecting investor confidence. Regional competition from more established technology zones.	**Eliminate:** Overlapping bureaucratic procedures between federal and provincial governments. Enhance: Collaboration with international technology hubs to accelerate zone development. **Threats:** Lack of long-term policy consistency. Hedge: Introduce risk-sharing mechanisms for investors in case of policy or infrastructure delays

Organization	SWOT	EETH
MoITT	**strengths**: Central authority for strategic policy formulation and digital transformation. Successful implementation of policies like ETO (2002) and STZA Act (2021). **Weaknesses**: Limited capacity for monitoring policy outcomes in high-tech and reverse engineering. Gaps in integrating private-sector inputs into policy development. **Opportunities**: Driving innovation in AI, semiconductors, and reverse engineering through robust policies. Facilitating global partnerships for technology transfer and capacity building. **Threats**: Rapidly changing global technological trends. Cybersecurity risks associated with increased digitization	**Eliminate**: Fragmentation of responsibilities among overlapping institutions. **Enhance**: Focus on emerging areas like AI, IoT, and local manufacturing of tech components. **Threats**: Overdependence on imported technology and lack of skilled workforce. **Hedge**: Strengthen public-private partnerships to promote innovation and mitigate risks
HEC	**Strengths:** Active role in funding and supporting academic research and innovation. Capacity-building initiatives to develop a skilled workforce for the tech sector. **Weaknesses:** Limited commercialization of academic research. Gaps in aligning research outcomes with industry needs. **Opportunities:** Creating specialized reverse engineering labs and R&D **centers at** universities. Expanding collaborations with global academic and research institutions. **Threats:** Brain drain due to limited domestic opportunities for researchers. Mismatch between educational outputs and industrial demands	**Eliminate:** Redundancy and inefficiencies in research funding allocation. **Enhance:** Industry-academia linkages for applied research. **Threats:** Talent loss due to lack of incentives. **Hedge**: Launch scholarship and fellowship programs tied to local employment.

Organization	SWOT	EETH
MoST	**Strengths**: Central authority for national R&D and technological advancement. Oversight of institutions like PCSIR, providing a strong foundation for innovation. **Weaknesses:** Bureaucratic hurdles slowing implementation of high-tech projects. Limited focus on commercialization of R&D outputs. **Opportunities:** Promoting green technologies and renewable energy innovations. Leading reverse engineering efforts in defense and industrial sectors. **Threats:** Rapid global technological changes outpacing domestic capacities. Over-reliance on government budgets for R&D funding.	**Eliminate:** Overlapping mandates with other ministries and organizations. **Enhance**: Capacity-building initiatives for reverse engineering in key sectors. **Threats:** Lack of international collaboration in cutting-edge R&D. **Hedge**: Secure partnerships with global technology leaders to ensure steady knowledge transfer
POF Wah	**Strengths:** - Established industrial base - Skilled workforce - Export potential - Government backing - Integration opportunities **Weaknesses:** - Technological obsolescence - Bureaucratic hurdles - Limited R&D investment **Opportunity** - Public-private partnerships - Global demand for defense equipment - Localization of supply chains - Defense modernization **Threats** - International sanctions - Competition from regional players - Geopolitical instability	**Eliminate** Bureaucratic inefficiencies - Outdated technology **Enhance** - R&D investments - Export-focused initiatives **Threat Management** Hedge against sanctions through localization **Hedge** - Diversify markets and partnerships

Organization	SWOT	EETH
PAC Kamra	**Strengths:** Indigenous aircraft development (e.g., JF-17) - Technical expertise in MRO - Strategic importance - R&D capabilities **Weaknesses:** Dependence on foreign partners - Export limitations - High operational costs **Opportunity** Commercial aviation market - Aerospace innovation - Global partnerships **Threats** Technology denial regimes - Economic constraints - Cybersecurity risks	**Eliminate** - Reliance on foreign tech **Enhance** - Aerospace R&D - Civil aviation expansion **Threat Management** Strengthen cybersecurity for aerospace system **Hedge** Broaden global collaborations beyond China
NAVTTC	**Strengths:** Comprehensive training network - Policy support - Industry collaboration - Youth focus **Weaknesses:** Quality assurance gaps - Outdated curriculum - Limited outreach **Opportunity** High-tech skill development - Global demand for skilled labor - Industry-academia linkages - Digital transformation **Threats** Brain drain - Funding challenges - Rapid technological changes	**Eliminate** Outdated curriculum and delivery mechanisms **Enhance** Digital training platforms - Regional outreach **Threat Management** Address brain drain via incentives **Hedge** - Encourage industry-academia collaboration

Key Drivers and Barriers of Legal and Institutional Frameworks;

Category	Framework/Institution	Key Drivers	Barriers
Legal Frameworks	Pakistan Telecommunication (Re-Organization) Act, 1996	- Established PTA to regulate the telecom sector. - Promoted competition and consumer protection.	- Outdated provisions for 5G, IoT, and satellite tech. - Weak spectrum allocation policy for emerging technologies.
	Electronic Transactions Ordinance (ETO), 2002	- Legal recognition of electronic documents and signatures. - Facilitated e-commerce and online payments.	- Limited regulations for cross-border e-commerce. - Weak enforcement of digital fraud prevention.
	Prevention of Electronic Crimes Act (PECA), 2016	- Defined and addressed key cyber offenses. - Established FIA Cybercrime Wing for enforcement.	- Broad provisions criticized for limiting freedom of expression. - Limited technical expertise in handling advanced cybercrimes.
	Special Technology Zones Authority (STZA) Act, 2021	- Incentives for technology companies in STZs. - Promotes FDI and innovation hubs.	- Slow development of STZ infrastructure. - Limited awareness among investors.
	National Information Technology Board (NITB) Act, 2022	- Standardized IT practices in government. - Drives e-governance initiatives.	- Resource constraints for large-scale IT standardization. - Resistance to change within public institutions.

Institutional Frameworks	Pakistan Telecommunication Authority (PTA)	- Regulates telecom and promotes digital connectivity.	- Unprepared for 5G and advanced telecom technologies. - Challenges in enforcing service quality standards.
	National Information Technology Board (NITB)	- Oversees e-governance initiatives. - Standardizes IT practices across public-sector institutions.	- Insufficient integration with private sector innovations. - Resource constraints for project implementation.
	Special Technology Zones Authority (STZA)	- Incentives for high-tech companies in STZs. - Provides a framework for technology-driven economic growth.	- Delayed project rollouts and infrastructure development. - Inefficient coordination with provincial governments.
	Ignite National Technology Fund	- Provides funding for innovative tech startups. - Focuses on entrepreneurship and emerging technologies.	- Limited scalability of funded projects. - Gaps in monitoring project outcomes.
	Pakistan Software Export Board (PSEB)	- Supports IT exports and market access. - Promotes IT parks and capacity building for startups.	- Inadequate focus on hardware exports. - Limited outreach to global tech markets.
	Pakistan Council for Scientific and Industrial Research (PCSIR)	- Mandate to promote R&D and reverse engineering in industrial sectors. - Focuses on renewable	- Outdated infrastructure and weak R&D commercialization. - Limited collaboration with private

		energy and defense technologies.	sector and global R&D. -no persistent efforts and policy to promote reverse engineering in the potential sectors i.e. agriculture, textile.etc
	Ministry of Information Technology and Telecommunication (MoITT)	- Central authority for ICT policies and digital transformation. - Implements key policies like ETO and STZA Act.	- Gaps in integrating private sector inputs into policymaking. - Limited capacity for monitoring policy outcomes.
	Ministry of Science and Technology (MoST)	- Oversees National R&D and tech advancement. - Provides legislative and regulatory support for innovation.	- Bureaucratic delays in implementing high-tech projects. - Limited focus on commercialization of R&D outputs.

	Pakistan Ordnance Factory (POF) Wah	- Government support and funding for defense production. - Demand for indigenous defense equipment due to regional security concerns. - Export potential in global defense markets. - Integration opportunities with private sectors and SMEs	- Outdated technology and manufacturing processes. - Slow decision-making due to bureaucratic hurdles. - Limited R&D investment and innovation culture. - Geopolitical instability impacting supply chains.

	Pakistan Aeronautical Complex (PAC) Kamra	- Collaboration with China (e.g., JF-17 development). - Growing demand for military and commercial aviation in the region. - Strong technical expertise in MRO and aerospace manufacturing. - Government support for defense modernization.	- Overreliance on foreign technology and expertise. - Lack of global certifications for exports. - Budgetary constraints limiting R&D growth. - Cybersecurity risks to critical aerospace technologies.
	National Vocational and Technical Training Commission (NAVTTC)	- Large youth population eager for skill development. - Government policies supporting technical education (e.g., Hunarmand Pakistan). - Collaboration opportunities with industries and academia. - Increasing global demand for skilled labor in high-tech industries.	- Outdated curriculum misaligned with market needs. - Limited outreach to rural areas and marginalized groups. - Quality assurance challenges across training institutions. - Funding and resource constraints.

Gap Analysis Based on the Blavatnik School of Government's Oxford Index of Public Administration (OIPA): A Comparative Study of Reverse Engineering and R&D Activities in Universities and Industrial Research Organizations (Including POF Wah) in Pakistan

Reverse engineering (RE) and research and development (R&D) are crucial for technological and industrial progress. Using the Oxford Index of Public Administration (OIPA).

This analysis evaluates Pakistan's governance and public administration in supporting RE and R&D, focusing on universities and the Pakistan Ordnance Factory (POF) Wah. A GAP analysis compares Pakistan's performance with India at OIPA index No.50 and China at No.51 to identify shortcomings and recommend improvements in strategy, policy, delivery, and workforce development

Domain	Pakistan	India	China	GAP Analysis
Strategy and Leadership	Limited focus on Reverse Engineering (RE) in universities and industries. - Leadership lacks strategic goals aligned with national priorities. - POF operates in silos, with limited integration with academia.	-Reverse Engineering (RE) prioritized in defense and industries (e.g., DRDO). - Leadership drives innovation aligned with national goals (e.g., Make in India).	- Reverse Engineering (RE) is a national strategy integrated with universities, industries, and government. - Centralized leadership with a long-term vision.	- Pakistan lacks synergy between academia and industries like Pakistan Ordnance Factory WAH. - Leadership and strategy are fragmented compared to India and China.
Public Policy	- Policies focus heavily on defense but lack emphasis on broader innovation. - Inconsistent funding for RE and R&D. - Outdated policies in POF Wah limit global competitiveness .	-Policies encourage RE for indigenous production (e.g., offset clauses in defense). - R&D supported by targeted programs like Startup India.	- Aggressive policies reduce dependence on foreign tech (e.g., "Made in China 2025"). - Well-funded R&D plans.	Pakistan's policies are reactive and lack vision. - India balances RE and R&D effectively, while China excels with robust implementation.
National Delivery	- Poor coordination between universities, industries, and POF. - Weak infrastructure for scaling RE	-Effective coordination ensures marketable R&D outputs (e.g., DRDO, TATA). - National systems	-World-class delivery mechanisms (e.g., Huawei, Alibaba). - Universities act as innovation hubs directly	- Pakistan struggles with execution and delays in product delivery. - India moderately successful;

	and R&D outputs	support translation of research into products.	linked to industry.	China has exemplary delivery systems.
People and Processes	- Lack of skilled manpower in advanced RE and R&D. - Bureaucratic hurdles hinder innovation and collaboration. - Significant brain drain.	-Strong talent pool due to institutions like IITs and IISc. - Industry-academia collaboration fosters innovation - Skill India program	-Heavy investment in education and talent development. - Streamlined processes foster collaboration among stakeholders.	- Pakistan faces a talent deficit and brain drain. - Bureaucratic inefficiencies limit potential, unlike India and China.

Policy actions implemented by China and India

Policy Actions	India	China
Hi-Tech Industrial Policies	- **"Make in India"** initiative boosted indigenous manufacturing in defense, electronics, and aerospace sectors. - **Electronics Manufacturing Clusters (EMC)** scheme encouraged investments in advanced technology.	**"Made in China 2025**" plan targeted robotics, AI, semiconductors, and aerospace to reduce reliance on foreign technology. - Provided subsidies, tax breaks, and state funding for strategic industries.
Public-Private Partnerships (PPP)	-Encouraged collaboration between government, academia, and industry through initiatives like DST-PPP. - Partnerships with private firms like TATA and DRDO drove R&D.	- Close integration between state-owned enterprises, private firms, and research universities. - Mandated technology transfer from foreign firms for market access.
Educational Reforms and Skill Development	-Launched the **Skill India** program to train the workforce for hi-tech industries. - Established centers of excellence at IITs and IISc to focus on innovation	-Invested in STEM education and research institutions. - Promoted university-industry collaboration to develop a talent pipeline for strategic industries.
Export Policies and Trade Regulations	Defense export policies encouraged indigenous production for global markets. - Tariff incentives supported local manufacturers in hi-tech industries.	- Strict trade policies incentivized local manufacturing and exports. - Focused on exporting high-tech products globally, including AI and consumer electronics.

Outcomes

China's "Made in China 2025" plan resulted in rapid advancements in high-tech manufacturing, particularly in telecommunications (e.g., Huawei, ZTE), semiconductors, and robotics. The aggressive state funding, subsidies, and tax breaks significantly reduced reliance on foreign technologies. China's heavy investment in R&D enabled it to achieve global leadership in AI, 5G, and renewable energy technologies, positioning itself at the forefront of global high-tech industries.

Furthermore, the strong integration between universities, state-owned enterprises, and private companies created a steady pipeline of skilled talent, bolstering its competitiveness in international markets.

India's "Make in India" initiative led to significant progress in indigenous production, particularly in aerospace, defense, and electronics sectors. Collaborative efforts through public-private partnerships (e.g., DRDO and TATA) and policy incentives such as the Electronics Manufacturing Clusters (EMC) scheme enhanced industrial capabilities and promoted innovation. Increased R&D spending driven by academia-industry collaboration has fostered advancements in software, defense, and biotech. While India has seen moderate growth in high-tech exports and improved recognition of its technology firms, its outcomes remain sector-specific and less diversified compared to China's overarching achievements.

Lessons for Pakistan

1. **Develop National Hi-Tech Strategies**

Formulate a comprehensive national strategy, similar to "Made in China 2025" or "Make in India," targeting key high-tech sectors such as defense, artificial intelligence (AI), and electronics.

2. **Enhance Policy Integration**

Design cohesive policies that incentivize indigenous production, reduce reliance on imports, and foster collaboration between universities, industries, and organizations like the Pakistan Ordnance Factories (POF), PAC Kamra,NRTC.etc.

3. **Invest in Education and Skills Development**

Reform the education system to prioritize STEM fields and align with hi-tech industry needs while introducing technical and vocational training programs modeled on initiatives like India's "Skill India."

4. **Foster Public-Private Partnerships (PPP)**

Promote PPP models to fund and implement large-scale R&D projects while incentivizing industries to collaborate with universities and research institutions like PCSIR, PARC, Incubation centers.etc.

5. **Enhance Delivery Mechanisms**

Build research parks and industrial zones to scale R&D efforts and outputs, and streamline bureaucratic processes to facilitate faster commercialization of innovations.

By learning from the successes of India and China, Pakistan can establish a robust ecosystem for reverse engineering and R&D, driving sustainable economic growth and technological advancement.

Comparative Analysis of Pakistan's Hi-Tech Industry in the Global Context

Global Overview of Hi-Tech Industry

1. **United States:** Leads globally with Silicon Valley as a hub of innovation (National Science Board, 2022). Policies emphasize R&D incentives, robust IP protection, and strong academia-industry linkages.
2. **China:** Focuses on mass manufacturing, state-sponsored R&D, and AI (World Intellectual Property Organization, 2023). Strong government support and investment in infrastructure have been key.
3. **India:** Excels in IT services, driven by a highly skilled workforce, outsourcing opportunities, and cost competitiveness (McKinsey & Company, 2022).
4. **European Union:** Known for high standards in research, sustainability, and data protection (e.g., GDPR) (European Commission, 2023). Strong public-private partnerships drive innovation.
5. **South Korea:** A global leader in electronics and semiconductors, supported by significant investment in R&D, advanced manufacturing capabilities, and a focus on innovation in telecommunications and automotive technologies (OECD, 2023).

Global Context and Benchmarking

Pakistan's high-tech industry, particularly its Information Technology (IT) sector, has demonstrated significant growth and potential in recent years. The country has been recognized as a global technology hub, notably being named "Tech Destination of the Year" at GITEX Global 2024, reflecting its commitment to innovation and the increasing prominence of its IT industry on the international stage (Ali, 2024).

In the fiscal year 2023-2024, Pakistan's IT exports reached a record $3.2 billion, marking a 24% increase from the previous year. This growth positions Pakistan as a notable player in the global IT services market, though it still trails behind leading countries like India, whose technology exports are approaching $200 billion (Tribune Correspondent, 2024; Criterion Quarterly Editorial Team, 2023). To further enhance its global standing, Pakistan has been actively participating in international technology exhibitions and fostering collaborations with global tech leaders (Ali, 2024).

Alignment with Global Standards and Best Practices

To align with global standards, Pakistan has initiated several measures:

- **Policy Development**
  The government approved the Science, Technology, and Innovation Policy-2021, aiming to address the needs of various sectors and meet the challenges of the new era, particularly in light of changing socio-economic dynamics and emerging technologies (TechX.pk Staff, 2021).
- **Regulatory Frameworks**
  Efforts are underway to align national policies with international standards, particularly in satellite technology and Low Earth Orbit (LEO) satellites, to enhance connectivity and drive technological innovation (Radio Pakistan, 2025).
- **Special Technology Zones (STZs)**
  The establishment of STZs aims to incentivize tech companies to operate within the country through tax-exempt programs, fostering an environment conducive to innovation and growth (Forbes Technology Council, 2022).
- **Skill Development and Certification**
  There is a need for massive training programs to capitalize on Pakistan's IT potential. Institutions like the Higher Education Commission (HEC), National Vocational and Technical Training Commission (NAVTTC), and Technical Education and Vocational Training Authority (TEVTA) must be revamped to keep up with the rapidly evolving IT landscape. Furthermore, all skill certifications awarded in Pakistan should be accredited by a global agency to ensure quality and international recognition (Moin, 2024).
- **Infrastructure and Connectivity**
  Recent internet disruptions have caused significant economic harm and uncertainty for businesses and investors, particularly in the crucial information technology sector. Ensuring reliable and high-speed internet connectivity is essential for maintaining global business operations and customer reliability (Mehta, 2023).
- **Research and Development (R&D)**
  Increased investment in R&D is crucial to foster innovation and keep pace with global technological advancements. This includes focusing on emerging technologies such as Artificial Intelligence (AI) and ensuring that the country is prepared to adopt and implement these technologies effectively (Josh and Mak International, 2023).

By addressing these areas, Pakistan can further strengthen its high-tech industry, enhance its global competitiveness, and ensure alignment with international standards and best practices.

Comprehensive GAP Analysis of Pakistan's Hi-Tech Industry Development Framework

Key Deficiencies and Gaps:

1. Strategic Vision and Leadership

Pakistan lacks a cohesive national strategy focused on developing high-tech sectors such as artificial intelligence (AI), semiconductors, renewable energy, and reverse engineering. Leadership in this domain is fragmented, with inadequate collaboration between government, academia, and industry. Unlike China's "*Made in China 2025*" or India's "*Make in India*" initiatives, Pakistan lacks a long-term roadmap to guide its high-tech ambitions effectively.

2. Policy and Legal Frameworks

Investment in research and development (R&D) remains below 1% of GDP, significantly lagging behind global benchmarks. Inconsistent policy implementation, such as the delayed rollout of Special Technology Zones (STZs), has diminished investor confidence. Outdated legal frameworks, including the PCSIR Act (1973) and the Seed Act (1976), fail to address contemporary technological needs. Additionally, initiatives like the Digital Pakistan Vision lack alignment with broader innovation-driven goals, reflecting a fragmented approach to policy formulation.

3. Human Capital Constraints

The country's limited focus on STEM education and technical training has resulted in a severe skill shortage in advanced technologies. Weak industry-academia linkages further contribute to the production of graduates ill-equipped to meet the demands of high-tech industries. Moreover, Pakistan faces significant brain drain, with many talented individuals leaving due to inadequate opportunities and incentives.

4. Infrastructure and Technology Gaps

Institutions such as PCSIR and POF Wah are hampered by outdated infrastructure and insufficient funding, stifling innovation and R&D efforts.

The delayed establishment of technology hubs and innovation clusters, such as STZs, has further hindered growth in key sectors.

5. Regulatory and Institutional Challenges

Overlapping mandates among organizations like MoITT, PCSIR, and STZA create inefficiencies, while weak governance frameworks, such as the inadequate cybersecurity provisions under PECA (2016), leave technological industries vulnerable. Additionally, programs like the Ignite Fund and PSEB initiatives suffer from limited oversight, reducing their overall impact.

6. Economic Contribution

High-tech industries contribute less than 1% to Pakistan's GDP, a stark contrast to China (15%) and India. The country's exports remain heavily reliant on traditional sectors such as textiles and agriculture, with minimal diversification into high-value technology products

Issues and Challenges

Inconsistent Policies, lack of political will and funding priorities

1. Lack of integrated long term national strategy targeting critical hi-tech sectors due to ad hoc approach by successive governments. Meager allocation of funds for R&D and almost no funding for reverse engineering.
2. Absence of strategic policy regarding promotion of Reverse Engineering to compete with developing countries to minimize massive import burden i.e 54.73 Billion USD FY 23/24.
3. Limited collaboration and strong integration among academia, industry, and government. There is a missing link between research institutions like PCSIR, PARC, and other relevant stake holders with industry resultantly futile research mismatch industry needs.
4. Institutions like POF Wah, PAC Kamra, NRTC, PCSIR, etc work in silos, having no appropriate mechanism of interconnectivity for optimum use of knowledge sharing and Skilled Human resource, R&D and technology sharing.
5. Absence of robust Industry- academia linkages effecting economy in two ways, firstly, graduates are getting degrees which have very less demand in market resultantly less

employability and secondly, the research of academia is outdated and not market-oriented.

6. Universities and Research Institutions are lagging behind in the field of reverse engineering which is need of the day for developing countries like Pakistan.
7. Persistent law and order situation discourages the confidence of private sector.

Private Sector's Concerns

The private sector faces significant challenges due to government apathy towards skilled talent, particularly in areas like the Golden Triangle of Dara Adam Khel. Persistent law and order issues undermine investor confidence, while a trust deficit prevails due to the government's unstable tax policies. Additionally, fears of institutional high-handedness, corruption, and red-tapism further discourage private sector engagement. The lack of a centralized portal for streamlined processes and inadequate government protection for local industries have led to an influx of Chinese products, leaving domestic businesses vulnerable

Legal Framework Gaps

The legal framework suffers from overlapping and duplication of federal and provincial laws following the 18th Amendment. Many laws, regulations, and rules, such as the PCSIR Act 1973, PARC Act, and Seed Law 1976, remain outdated, lacking provisions for production incentives and private-public partnership (PPP) inclusivity. Additionally, multiple and cumbersome approval mechanisms, licensing processes, and NOC requirements significantly hinder the ease of doing business and research outsourcing. A comprehensive legislative review to establish and strengthen academia, industry, and government linkages is urgently needed.

Human Capital Constraints

There is inadequate emphasis on STEM education and skill development, particularly in institutions like NAVTTC, which undermines the workforce's global competitiveness. The mismatch between course design and the needs of both international standards and local industries—such as AI, reverse engineering, digital marketing, blockchain, and data analytics—leads to low employability. Furthermore, a lack of opportunities and incentives drives significant brain drain, exacerbating the human capital challenge.

Insufficient R&D and Innovation

Investment in research and development (R&D) remains below 1% of GDP, far below global benchmarks. Weak commercialization of research outputs further limits the potential for innovation and industrial growth.

Infrastructure Deficiencies and Technological Shortcomings

Outdated facilities in key institutions, such as PCSIR and POF Wah, hamper technological advancement. Infrastructure development in Special Technology Zones (STZs) faces persistent delays, while the economy continues to rely heavily on traditional sectors like textiles and agriculture. The contribution of high-tech industries to GDP remains alarmingly low, at less than 1%.

Conclusion

Pakistan's hi-tech industry reflects significant potential but remains hindered by systemic inefficiencies, inadequate investment in R&D, outdated infrastructure, weak and outdated legal and institutional framework, lack of strategic leadership and political patronization. While there is a crucial missing link among academia-industry- public and private Sector. However, initiatives like STZs and the Digital Pakistan Policy are steps forward, their fragmented execution and insufficient alignment with global best practices have limited their impact due to law and order situation, inappropriate funding and trust deficit of private sector. Without substantial reforms, Pakistan risks falling further behind in global competitiveness and long term economic sustainability based on High Tech Innovations. Reverse Engineering, a pivotal strategy successfully employed by nations like China and Japan, remains underutilized in Pakistan to strengthen their emerging industries. Institutions such as the Pakistan Aeronautical Complex (PAC Kamra), the Pakistan Ordnance Factory (POF Wah), PCSIR, PARC, NRTC and local private sector based in golden triangle (Gujranwala, Faisalabad and Sialkot Region) have demonstrated ample capacity for reverse engineering, especially in defense, agriculture, pharmaceutical, sports, electrical appliances and avionics. However, these efforts lack the scale and integration necessary for broader industrial impact. By adopting reverse engineering as a critical component of its emerging industrial strategy, Pakistan can stimulate innovation, enhance and strengthen its export competitiveness, and foster technological self-reliance. This will ultimately pay dividends in reducing gigantic import bill and will provide a prosperous pathway to economic sustainability.

Recommendations

Develop a Comprehensive National Strategy

- Pakistan must urgently formulate a high-tech strategic vision "Made in Pakistan" and implement policies on a war footing, drawing inspiration from successful initiatives like China's 'Made in China 2025' and India's 'Make in India.' Building on the framework of Pakistan's Vision 2025 and the Digital Pakistan initiative, the country should prioritize advanced sectors such as artificial intelligence, semiconductors, agriculture, pharmaceuticals, sports, renewable energy, avionics and drone technology, and aerospace. By adopting the concept of reverse engineering and aligning these efforts with existing national development strategies, earmarking sufficient continuous funding, Pakistan can accelerate technological progress and strengthen its position in the global economy.

- The "Triple Helix Model" has immense potential in Pakistan through collaboration academia, industry and government to boost innovation and reverse engineering capabilities of technological advancements. By aligning these sectors Pakistan can create a robust ecosystem that derives sustainable economic development. Though this model has been adopted by institutions like National Science and Technology Park IAST-PAF, yet this model be introduced as a National Policy to create a hub where universities, industries and government work together to create technology driven solution.
- The mandate of Special Investment Facilitation Council (SIFC) be extended in devising and implementing the strategic policy in promoting High Tech Innovative Emerging Industries (based on Reverse Engineering similar to China Model) with special focus on reverse engineering. To ensure its policy implementation, a high-level task force be established. Engineering
- By harnessing the untapped potential of the Golden Triangle region, comprising Faisalabad, Gujranwala, and Sialkot, through collaboration with all relevant stakeholders, including academia and the private sector. Moreover, weapon industry based on reverse engineering in Dara Adam Khel and Uncut Gem Stone Market in Peshawar has a great potential. This region, burdened by decades-old, outdated infrastructure due to government inaction and lack of support, has seen its potential for reverse engineering largely overlooked. Revitalizing this area with financial investment, state ownership, and encouragement to adopt cutting-edge strategies comparable to those of China, India, and Japan could revolutionize Pakistan's high-tech economic growth.
- To promote reverse engineering in local industry, tailored strategies inspired by China and Japan are essential. High-tech industries require technology-sharing agreements, while hydroponic agriculture needs subsidies for adoption. Risk-sharing mechanisms should support local R&D, and talent pools must be developed for electronics, automobiles, and renewable energy. In textiles, joint ventures with global brands should be facilitated, and surgical equipment manufacturing upgraded with best practices. Tax incentives on raw material imports can attract private industry and drive sustainable growth.
- The HEC should make a policy that universities perform pre-dominantly reverse engineering-oriented research in collaboration with industries, i.e. Chambers of Commerce to make research industry oriented and demand based.
- Centralized one window operation to be supervised by SIFC be established for ease of business.
- Engineering Development board should make mandatory on auto manufacturers to produce auto parts locally.

- Trust building measures be taken to bridge gap between public and private sectors. Moreover, it will minimize high-handedness and corruption of Govt. Officials.
- Buy Pakistani slogan be promoted and implemented by Government where all Government institutions to buy local products.

Strengthen Legal Frameworks

- Consistent unification and upgradation of various overlapping legislations within Federal Government those creating hurdles in promotion and adaptation of advance high-tech industry as well as provincial laws in consonance with federal legislative structure for ease of doing business.
- Amendment be made in PCSIR, PITAC and PARC Act regarding "production" and "PPP" inclusion for establishing link to promote mass production at commercial level, need based research and self-sustainability of these institutions to adopt reverse engineering at par with China and Japan.
- Involvement of Business Houses in the process of legislation for uniform policies and clear roadmap for high tech innovative emerging industries.
- Steps be taken to modify IP laws by giving space for promotion of reverse engineering.
- Draft semiconductor policy and artificial intelligence policy may be finalized and approved at earliest.

Enhance Human Capital Development and R&D Investment

- Reform STEM through HEC and expand vocational training under NAVTTC, NUST, CTTI. etc, to promote reverse engineering and creation of incubation centers at regional level to establish linkages with universities and local industry.
- Foster industry-academia collaboration to align curricula with high-tech market demands, increase R&D spending to 2% of GDP in the medium term, and encourage public-private partnerships to fund large-scale innovation with a focus on applied research addressing local industrial needs.

Accelerate Infrastructure Development

- Upgrade facilities in PCSIR, POF Wah, and other key institutions and fast-track the development of STZs to attract foreign direct investment (FDI).

Foster Institutional Efficiency

- Streamline the roles of POF Wah, PAC Kamra, MoITT, PARC, NSTP, PCSIR, and STZA to eliminate redundancies and encourage startups and spin-offs from university research through industry funding and government support.
- Enhance the governance and accountability of initiatives like Ignite Fund and PSEB and strengthen cybersecurity measures to protect digital assets.

Align with Global Standards

- Benchmark policies against global leaders like China, India, and Japan and establishment of local academia linkages with foreign universities promoting high tech emerging industries to create a talent pool for reverse engineering industry.
- Ensure that technical certifications from Pakistan meet global quality standards.

Implementation Plan: Log Frame Matrix:

Objective	Output	Activities	Indicator	Time lines	Responsible Entities
Develop a Comprehensive National Strategy	A national high-tech strategic vision and policies aligned with Pakistan's Vision 2025.	Conduct stakeholder consultations (government, academia, industry). - Draft and finalize strategy inspired by global models. - Establish a high-level task force for reverse engineering with defined TORs.	- Strategy document approved. - Number of stakeholders consulted. - Task force operational.	6 months	Ministry of Planning & Development (MoPD), Special Investment Facilitation Council (SIFC)
	- Integration of the "Triple	Draft policy to formalize academia-	Policy approved. - Number of	One year	Ministry of Science and Technology

	Helix Model" as a national policy.	industry-government collaboration. - Present policy to Parliament for approval.	collaborative hubs established.		(MoST), National Science and Technology Park (NSTP), HEC
	Revitalization of the Golden Triangle region (Faisalabad, Gujranwala, Sialkot).	- Conduct assessments of regional industrial potential. - Provide funding for modernizing infrastructure and promoting reverse engineering.	Number of modernization projects initiated. - Investments secured for regional development.	2 years	Ministry of Commerce, Provincial Governments
Strengthen Legal Frameworks	Revised PCSIR and PARC Acts to include "PPP" and "production" components.	- Draft and table amendments in PCSIR and PARC Acts. - Include business houses in consultative meetings for uniform policy formulation.	Amendments approved. - Number of consultations held.	One year	Ministry of Law, MoST, PCSIR, PARC, Board of Investment (BoI)
	- Unified federal and provincial laws for ease of doing business.	Review and unify overlapping legislation at federal and provincial levels.	- Unified legal framework finalized. - Reduced legal hurdles reported.	18 months	Ministry of Law, BoI
Enhance Human Capital	- Updated STEM curriculum	Partner with academia	Number of curricula updated.	One year	HEC, NAVTTC, NUST

Development and R&D Investment	aligned with high-tech industry demands.	and industry to revise curricula. - Implement updates across educational institutions.	- Adoption by universities and technical institutes.		Universities
	50 regional incubation centers established. - R&D spending increased to 2% of GDP.	- Identify locations and secure funding for incubation centers. - Increase budget allocations for R&D and establish public-private funding mechanisms.	- Number of operational incubation centers. - Percentage of GDP allocated to R&D. - Number of R&D projects initiated.	2-5 years	NAVTTC, NSTP, MoST, Ministry of Finance
Accelerate Infrastructure Development	Modernized facilities at PCSIR, POF Wah, and other key institutions.	Conduct infrastructure audits. - Upgrade facilities using allocated funding.	Number of institutions modernized. - Audit reports completed.	3 years	MoST, Ministry of Defence Production
	10 operational Special Technology Zones (STZs).	Identify locations, secure FDI, and initiate construction.	Number of operational STZs. - Amount of FDI attracted.	5 years	Special Technology Zones Authority (STZA), BoI
Foster Institutional Efficiency	Streamlined roles of key institutions (e.g., POF Wah, PAC Kamra, PARC, PCSIR).	Conduct role audits. - Eliminate redundancies and implement streamlined processes.	Number of institutions streamlined. - Audit findings implemented.	2 years	MoST, Ignite Fund, PSEB
	- 10 start-	Increase	- Number of	2	Ignite Fund,

	ups or spin-offs funded annually.	Ignite Fund allocations. - Establish start-up-friendly policies.	start-ups funded. - Reports from Ignite Fund and PSEB.	years	PSEB, NSTP
Align with Global Standards	- Partnerships with 10 foreign universities.	- Identify potential partners. - Sign MoUs and initiate collaborative programs.	- Number of partnerships established. - Joint projects initiated.	3 years	HEC, Ministry of Foreign Affairs
	- Certifications aligned with global standards.	- Benchmark local certifications against global standards. - Upgrade certification processes.	- Number of certifications aligned. - Reports from certification bodies.	2 years	NAVTTC, PCSIR, MoST

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