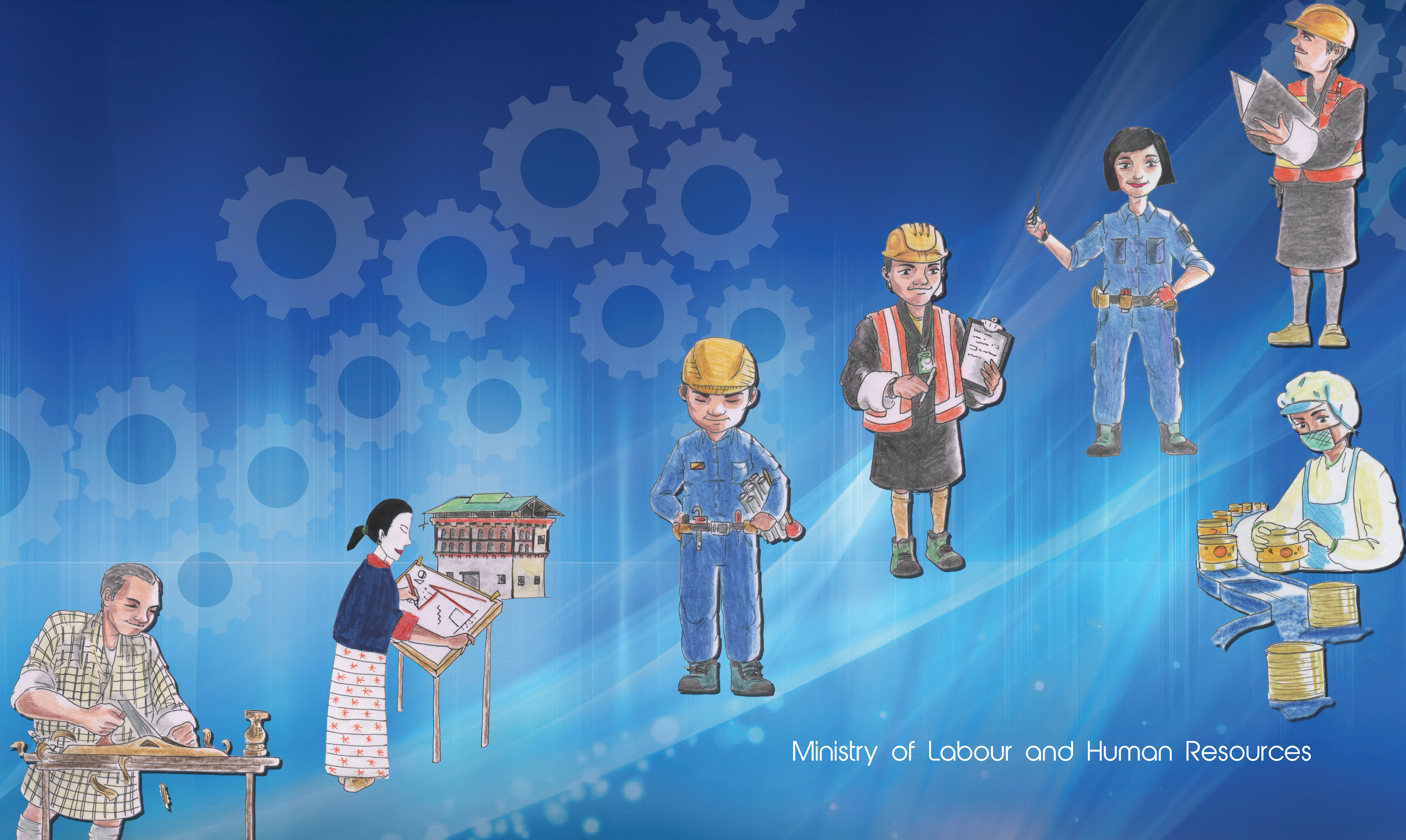
"Our nation's vision can only be fulfilled if the scope of our dreams and aspirations are matched by the reality of our commitment to nurturing our future citizens"

His Majesty the Druk Gyalpo

NATIONAL WORKFORCE PLAN (2016-22)

Tourism, Construction & Production Sector



Ministry of Labour and Human Resources

In Dedication to the 60th Birth Anniversary of our beloved Fourth Druk Gyalpo

NATIONAL WORKFORCE PLAN (2016-22)

Tourism, Construction & Production Sector

Developed by
Human Resources Development Division, Department of Human Resources,
Ministry of Labour and Human Resources

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NWFP 2016-22 Coordinator & Author
Tenzin Choden, Human Resource Development Division, Department of Human Resources, MoLHR

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Yeetop P. Dorji (a student undergoing 2D animation training under YES program of MoLHR with iBEST)

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“The government has provided education to our youth. But for the nation to prosper for all time, a sound education must be succeeded by access to the right jobs and responsibilities, so that our youth may bloom as individuals and at the same time serve their Nation well.”

“The greatest and the most valuable wealth we have in Bhutan is our people. We can never go wrong if we invest in human resources – no matter how much it cost, that investment will give our Nation rich dividends and what we lack in number, we must make up in talent.”

His Majesty’s address at the 2012 National Day Celebration
and 2015 Graduate Convocation

FOREWORD

The quality of human resources is fundamental to any socio-economic development of a nation. In the recent years, the Royal Government has accorded high priority and commitment to resolve the increasing unemployment, especially among youth, and the underemployment issue in the country. While there are programs initiated to address the skills requirement of those entering the labour market for better alignment with the industry need, the government has also been working towards a mechanism to collect labour market signal for the future jobs in the industry for proper guidance to our students, training providers, and tertiary education institutions.

The National Workforce Plan (NWFP) developed by the Ministry of Labour and Human Resources (MoLHR) is an effort towards aligning the labour supply (which are driven by our Technical and Vocational Education and Training (TVET) and Tertiary Education system) to the employer's demand, thus resulting in productive and effective workforce and more competitive Bhutanese businesses. The NWFP also seeks to equip students with skills required by the industry, and foster acquisition of higher skills and learning among the workforce for greater productivity within the industry.

The first NWFP has been developed for three economic sectors; ***Tourism, Construction and Production.*** These three sectors are identified as one of the five jewels, and priority sector as per our Economic Development Policy (EDP) due to its growth and employment potential. As emphasized in the findings, Bhutan will see jobs for high skilled, medium skilled and skilled in these three sectors.

In developing the NWFP, the MoLHR has relied heavily on collaboration and partnership with different stakeholders. The NWFP have been developed involving more than 2500 representatives from the industries, industry bodies, TVET institutions, tertiary institutions and relevant government agencies. Therefore, it's a document representing input and views of our industries and stakeholders within the three sectors. Therefore, I am sure that you will continue to extend your cooperation and enthusiasm during implementation of the strategies highlighted in the plan.

I congratulate the Department of Human Resources (DHR), particularly the Human Resource Development Division (HRDD) for successfully formulating the NWFP, which will now serve as an important guiding document on labour market signal for the two plan periods. My appreciation also goes out to all different agencies and individuals for their full support and cooperation during the development process.

With best wishes and Tashi Delek!

Ngeema Sangay Tshempo
Minister, Ministry of Labour and Human Resources

Message from the Director

The National Workforce Plan (NWFP) is the first of its kind developed by the Department of Human Resources (DHR), the Ministry of Labour and Human Resources (MoLHR). The NWFP seeks to provide assessment on the skills requirement in three important sectors; tourism, construction and production. During the execution of MoU between MoLHR and Industries in 2014, it was observed that none of the industries in the country- from smallest to the largest does not have manpower or human resource plans. This has not only affected our industry's effort to attract young job seekers, university graduates and talents in the private sector, but for the TVET and tertiary education institution to deliver job relevant training and courses. While our industries are not able to find the right talents, Bhutan also faces situation of increasing unemployment, especially among the youth. The NWFP, is therefore an intervention to close the gap between supply and demand of workforce in the country.

The DHR would like to acknowledge the assistance provided by the Australian government through support from Department of Foreign Affairs and Trade (DFAT) and Queensland University of Technology (QUT) in building capacity of relevant officials in workforce planning and development. From the conceptualization to the launch of the NWFP, it took one year. More than 2500 different establishments in the three sectors participated and contributed towards this plan. Different levels of survey and consultation took place.

This document is also a result of effort put forward by Tenzin Choden, Officiating Chief of the Human Resource Development Division (HRDD) with the DHR, who took a lead role in preparation and formulation of this document. Her hard work, and support from different individuals, industries and agencies have been key to the development of the NWFP. Henceforth, this plan will now form as the main basis for workforce development in three sectors during the 11th and 12th FYP period. I believe that this document will provide good source of information to our TVET providers, tertiary education institutions, government agencies, sector bodies in the three sector, and industries in developing relevant policy and program intervention from their sides.

Tashi Delek!

Kinley Wangdi
DIRECTOR

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INTRODUCTION

INTRODUCTION

National Workforce Plan (NWFP) has become an urgent priority for Bhutan with complex labour market challenges, among which at the heart of everyone is the rising unemployment, high underemployment, and increasing youth unemployment in the country. Bhutan also faces shortage of skilled workers as indicated by regular inflow of foreign workers to fill those gaps. Further, our labour market is undergoing a transition, wherein job generation is seeing a visible shift from the civil service sector, which used to be the major employing sector, to the private sector. This require careful and systematic reforms within our HRD institutions, especially the tertiary/higher education and the Technical and Vocational Education and Training (TVET) providers to evolve with the labour market transition and dynamics.

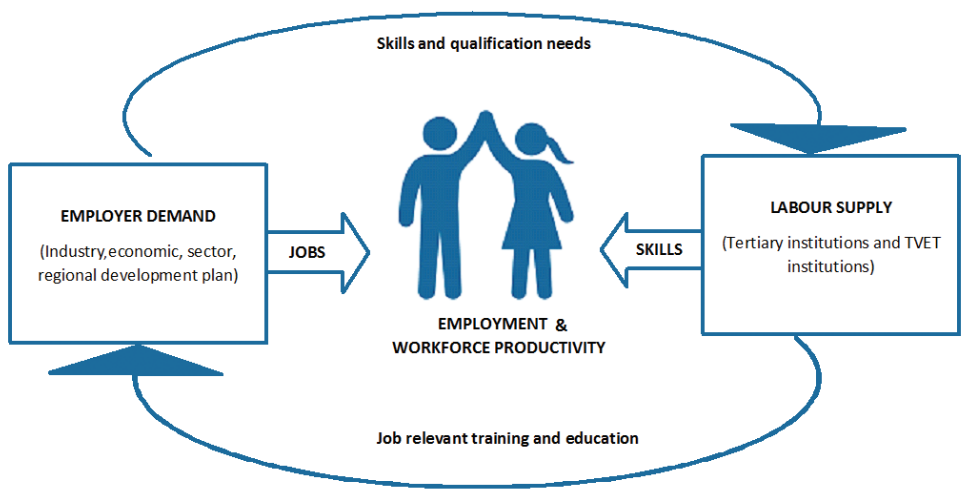
The National Human Resource Development Policy (NHRDP) 2010 of the Ministry of Labour and Human Resource (MoLHR) was the first national level effort in terms of drawing attention to the need for a coordinated and collaborative human resource development effort in the country. The NHRDP was developed with the objective to bring concurrence and cohesion among different human resource development activities within the country and to align the Economic Development Policy (EDP) 2010, to the workforce development effort. The policy has highlighted the need for the MoLHR to project HRD needs and situation in the country, assess the outcome and impact of HRD institutions and services, examine the quality and effectiveness of HRD services so that they are conducive to the employability and achievement of strategic goals of the nation, and to visualise future HRD challenges and trends in different sectors of the economy. Since the development of the NHRDP, the MoLHR has provided its HRD advisory role to human resource committees of different sectors, issued National HRD Advisory series with focus on different labour market themes, and developed HRD plan and guidance for different economic sectors.

The NWFP is an effort to bridge the gap between employer demand and labour supply so that jobs generated from the economic or sector growth matches with the skills supplied by the tertiary and TVET institutions, leading to employment and workforce productivity. The sectors identified for the first NWFP are the **tourism**, **construction,** and **production**. These sectors are considered one of the five jewels and are identified as priority sectors in the 11thFYP as well as in the EDP 2010 due to its growth and employment potential. The main objective of the NWFP is to:

- Ensure that the three identified economic sectors have access to appropriate and adequate workforce for its growth and productivity;
- Guide and inform on the demand (critical jobs) in the three sectors for appropriate interventions from the tertiary education and TVET institutions; and
- Identify appropriate workforce development strategies and interventions that will lead to employment generation and address the mismatch in the labour market.

The focus of the NWFP is to identify the critical jobs (also known as skills shortage) and critical capabilities (also known as skills gap) within these three sectors for 2016-18 (short-term) and 2019-22(medium-term). Critical job are those jobs which the industry has difficulty sourcing people and which requires immediate or long-term HRD interventions. Critical capabilities are those skills which are required across all level in the sector and can be addressed through training and development interventions.

Figure 1: NWFP as a means to bridge the gap between labour supply and employer demand



While the NWFP is being developed, HRD institutions within the country are also in process of developing their own action plans. The Tertiary Education Roadmap is being developed by the Department of Adult and Higher Education (DAHE), and the TVET Blueprint is being drawn up by the Department of Human Resources (DHR), MoLHR. Both these documents will provide a strategic direction in bringing guided intervention and reforms within the tertiary education and the TVET institutions. The focus will be on increasing relevance (social and economic), effectiveness (training and management) and internal efficiency (cost and sustainability) within these institutions. The NWFP on the other hand will provide understanding on the critical demand and workforce issues, within the industries, so that tertiary education and TVET institutions are able to align their program and policy intervention to match the labour market dynamics and changes.

Workforce planning is a continuous process as highlighted in the following workforce planning and development model. It starts with the understanding of profile, demography and strength of current workforce. Workforce strategies are developed to align with the needs, priorities and development within the sector, to ensure that it meets its legislative, regulatory, service and production requirements and organisational objectives. In this case, the workforce development strategies will be developed to close the gap between the existing supply and the demand from the industry.

While developing the NWFP, a sector assessment study was carried out to profile the existing workforce and the economic situation of the three identified sectors. Focus group discussions, interviews, and sector validation meetings were conducted at different level to verify and validate the findings and results of the assessment study. A comprehensive employer survey was carried out with about 2500 industries to assess the critical jobs and critical capabilities within these three sectors. Critical job is categorised into mission critical jobs, critical jobs and hard-to-fill jobs. Mission critical jobs are those jobs that have been identified critical to the businesses' capacity to deliver its organisation's mandate and services; critical jobs are those jobs where there is critical shortage locally, meaning there are simply not enough people with the skills, qualification and experience required to undertake the available jobs; and hard-to-fill jobs are those jobs where people are available in the labour market but they are not interested to take up the work for range of reasons, which may include location, working condition, pay, working hours among others. Critical job demand will be assessed for two time frames; immediate short-term requirement from 2016 to 2018 and medium-term requirement from 2019 to 2022.

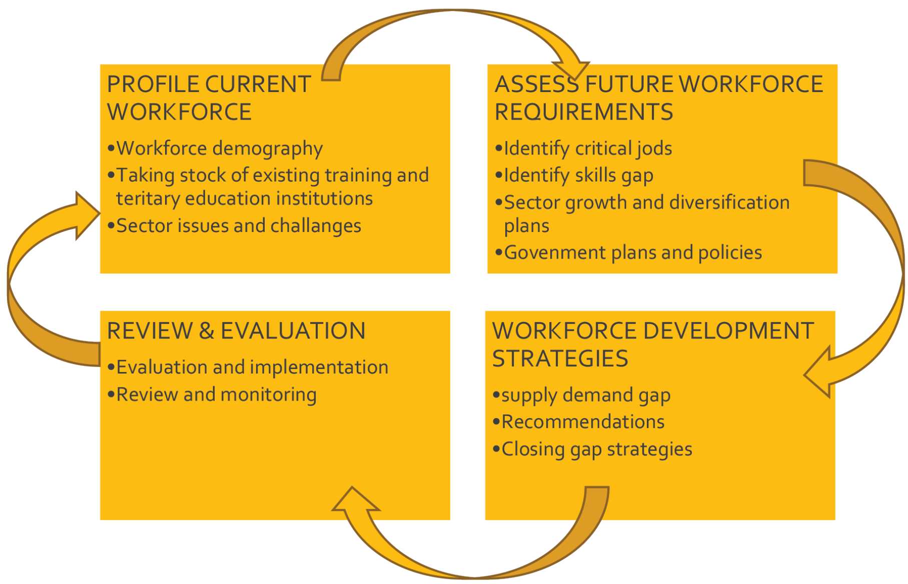
Critical capabilities, also known as skills gap, are those training and development needs required within the existing workforce to enhance their competency and productivity within the organisation. Skills gap can be addressed through various short-term or long-term training and development interventions.

In order to get accurate information during the employer survey, capacity of over 2800 business establishments in the three sectors were built in HR planning and forecasting. The training was implemented in partnership with six local training providers and covered all businesses in the 20 dzongkhags. The training focused specifically on identifying HR issues within their organisation, assessing critical skills gap and shortage, and making the industry familiar with HR terminologies used in the employer survey. A working group of those trained in workforce planning was formed to provide support during the development of the NWFP and an executive level committee comprising of sector and key agency heads was formed to provide policy guidance and direction to the NWFP.

Throughout this document, skill has been categorised into four levels; high skilled, medium skilled, skilled, and low skilled. High skilled includes those within the major occupation of professionals and managers requiring tertiary level education. Medium skilled includes technician and associate professional requiring diploma level skills or qualification. Skilled includes clerks, service and shop workers, craft and related workers, plant/machine operators and skilled agriculture workers requiring certificate level skills or training. And lastly low skilled workers include those under the elementary occupation category requiring little or basic training on-the-job.

The NWFP document has four main parts; first the key features of existing workforce and workforce development situation; second the key findings, which provides a brief summary of sector assessment study, interview and dialogues with key stakeholders, industry outlook and demand outlook findings and results; third the workforce development strategies, which are recommendations to the government, and training and tertiary education providers, in order to address workforce issues highlighted in the key findings; and lastly the sector outlook, which contains detailed analysis on the sector profile and demand profile collected from the employer survey with 840 tourism, 790 construction and 841 production establishments.

Figure 2: Workforce planning and development model



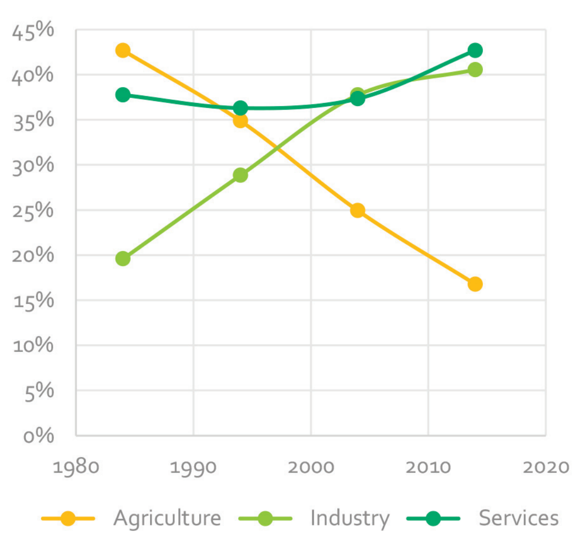
KEY FEATURES OF EXISTING WORKFORCE AND HRD INTERVENTIONS

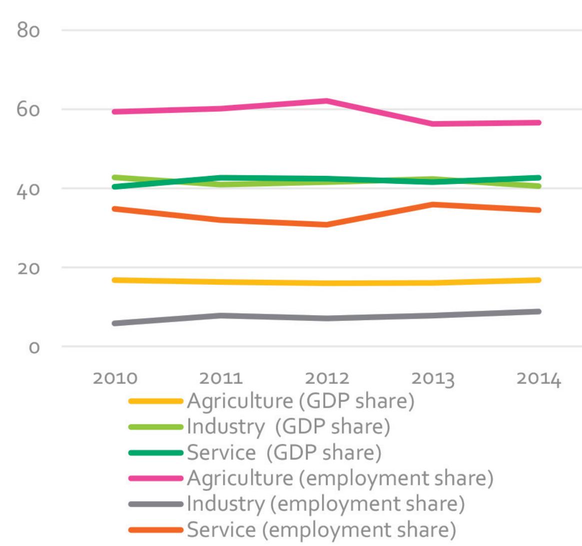
Typically, as an economy climbs up the development ladder, the agriculture sector loses its dominance as the lead contributor to the GDP and employment, giving way to rise in employment in the industry and service sector. Transition can also be seen with the shift in the economic activities and business development within the sub-sectors. Over the decades, the industry and service sector has grown making its share to the GDP of about 84%. Agriculture, despite its GDP share, has the highest employment share and there has been concerted effort from the government to foster productivity and diversification within the sector. Efforts have also been made towards building a stronger private sector. The Bhutan 2020: A vision for Peace Prosperity & Happiness foresees the private sector 'as the engine of the nation's future for economic growth' and also 'essential for the enlargement of nation's tax base'. The private sector is expected to create wealth of nation for the much needed economic development and generate adequate employment opportunities to absorb the growing job seekers in the country. The Royal Government of Bhutan (RGOB) is committed in removing all impediments and obstacles to the development and growth of the private sector. The RGOB is also committed in developing a favourable environment that respects and honours fair commercial practices and promotes entrepreneurial initiatives.

The EDP 2010 provides strategies and economic diversification plans for industries to move into higher value-added segments by promoting private sector participation. EDP 2010 envisions promotion of a green and self-reliant economy backed by an IT enabled society and aims to achieve economic self-reliance by 2020 and full employment of 97.5%. Some of the strategies set out to achieve these objectives are diversification of economic base with minimum ecological footprint, harnessing and value addition to natural resources in a sustainable manner, increasing and diversifications of exports, promoting Bhutan as organic brand and promoting industries that promote brand Bhutan. Therefore, the existing economic development efforts are geared more towards creating an attractive environment through guided business investment, infrastructure development and other incentives for business growth.

In the last 50 years, there has been gradual transition within the three broad sectors. In 1980s, agriculture was the biggest contributor to the GDP. Over the years, the industry and the service sector has grown as the largest contributor to GDP. Further, the share of employment in this sector has evolved.

Figure 3: Sector's share to GDP in last 40 years (left) and sector share to employment & GDP (right)





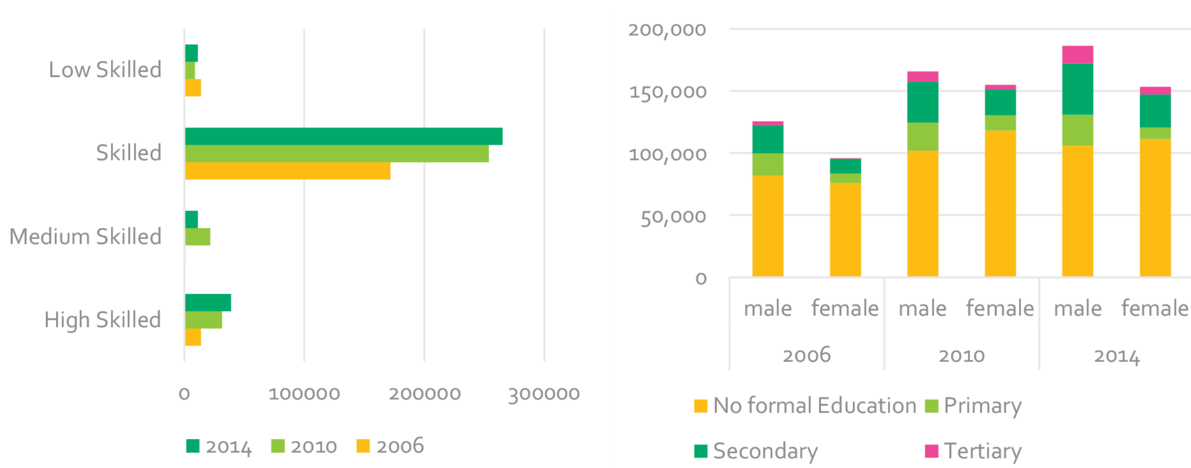
The following highlights some of the key features within our current workforce and HRD institutions

SLUGGISH TRANSITION IN WORKFORCE PROFILE

Bhutan is predominantly an agrarian society as indicated by the profile of our economic sector and workforce engagement in the last many decades. The profile of workforce by level of qualification, major occupation or sector engagement has not evolved much in the last ten years. The Labour Force Survey (LFS) 2014, indicated that labour force participation rate is 62.6% and more than half of the workforce is engaged in the agriculture or the primary sector. This figure was reported to be 56.7% as per LFS 2014.

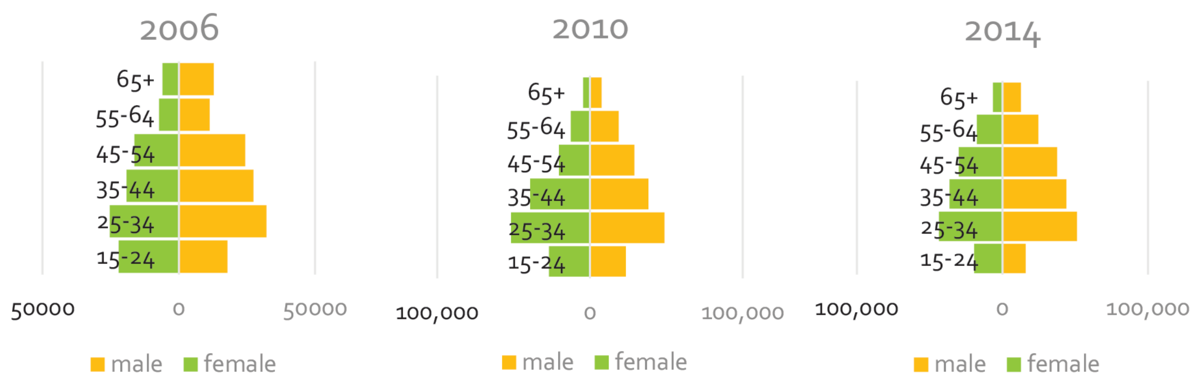
Skilled agriculture worker still continue to be one of the major occupations in which our workforce is engaged. There has been a marginal increase in the number of skilled workforce as indicated by the workforce engagement as craft and related workers, technical and associated professional and plant/machine operators. Similarly the education profile of our workforce has seen slow transition since illiteracy among the employed continues to be the highest. The LFS 2014 indicates that 46.4 % of the workforce is illiterate. The trend of illiteracy for the LFS conducted in 2006, 2010 and 2014 indicates similar proportion. Illiteracy among women continuous to be higher compared to men. The percentage of those who have completed tertiary education is comparatively low, although it has gradually improved over the years. Therefore, the state policy of enabling higher in-country capacity and access to the middle and higher secondary education graduates to acquire tertiary and higher education (Education Blueprint) will see a positive impact on the quality and level of workforce. Higher educated workforce with relevant qualification is expected to translate to better jobs and greater diversity within the industry.

Figure 4: Workforce by level of skills (left) and qualification (right)



Similarly, the age profile of workforce is mostly within the age bracket of 25-34 and 35-44, which is indicative of fairly young workforce and a developing economy. Over the years, the workforce demography in these age brackets have expanded but similar composition was seen in 2010 and 2014. Women's engagement in the labour force is also seeing a positive trend with increasing number of women engagement in the workforce. However, share of women in unemployment and underemployment is also comparatively high. The recent LFS conducted in 2013 and 2014 indicates increasing gender gap in the labour force participation and higher unemployment among women. Women workforce are mostly engage in agriculture and retail/wholesale businesses which require higher physical efforts, lower skill and has lower income generation prospect.

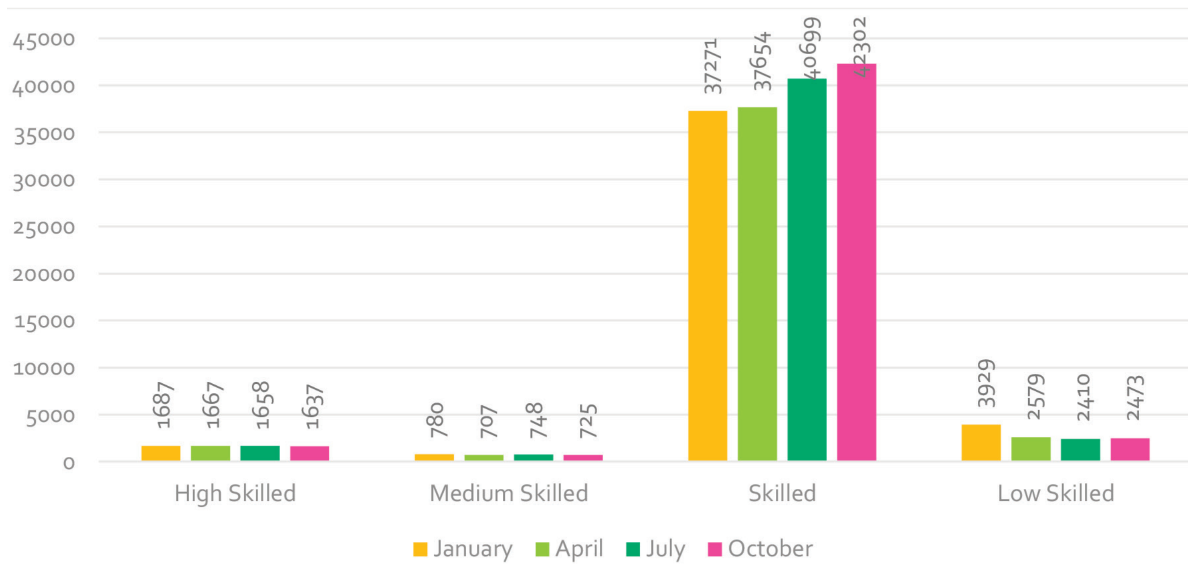
Figure 5: Profile of workforce by age group



FOREIGN WORKERS AND OVERSEAS EMPLOYMENT

A situation where a country imports foreign workers and exports national workforce is something prevalent in almost all economies, and Bhutan is no exception. Despite existing situation of unemployment and underemployment, Bhutan imports fairly large number of skilled foreign workers, primarily engaged in the construction and production sectors. An observation was made on the inflow of foreign workers in all quarter of 2015 and what was interesting is that in all the quarters, the composition of import in different occupational categories continued to be the same. A large number of foreign workers are engaged in skilled level by major occupation category of crafts and related workers, which includes skilled workers in construction, machinery and related trades. Bhutan also imported good number of high skilled workers in managerial and technical professional occupation category. The Department of Labour (DoL), which is the main agency that regulates foreign workers has recently imposed restriction on certain trades like plumbing, electrician, and cooks among many others. The DoL carefully assesses the supply available within the TVET and tertiary institutions according to which they decided on whether or not to provide approval for request for certain trade or occupation.

Figure 6: Foreign workers by level of skills in all quarters of 2015



As mentioned above, majority of foreign workers are engaged in the construction related work or activities since Bhutan has workforce shortage in the sector. This is also an area, where our TVET institutions are struggling to attract candidates. About 88% of the foreign workers are engaged in the hydro-power and other construction related works and 6% are engaged in the production sector. The major occupation of import in the construction sectors are concrete workers, mason and carpenter. The sector also import high numbers of civil engineers, welders and heavy vehicle drivers, and the situation of skills gap in the construction sector is expected to continue with many infrastructure and mega hydropower development projects in the pipeline.

Overseas employment was conceived in the 10th FYP period. The policy then was that placing scarce human resources for employment outside Bhutan should be the last resort for resolving unemployment in the country and that plan and strategies should as far as possible cater to the domestic human resource requirements and needs (NHRD Advisory 2012). In the 11th FYP, with rising unemployment and limited employment opportunities within the industry, overseas employment has been adopted as one of the strategies for fostering employment.

Against an ambitious target to send 30,000 for employment overseas in the 11th FYP period, a total of about 1500 has been sent as of December 2015 and about 800 has been sent in the production, construction and tourism related occupations. The MoLHR has been cautious with the implementation of overseas employment program since Bhutan has shortage of skilled workers which is expected to aggravate with industry growth and diversification against the smaller pool of workforce supply. The expectation is that 100% of these workforce will return in the medium or long run, therefore, careful assessment is being made on the kind of occupation and trades selected for overseas employment with intention to match them with the labour market demand in the future in the country. While the best practice is to import workers in area where there is critical skills shortage and export from those in which there is surplus, the labour market signal to guide the process is weak and needs strengthening.

DEVELOPMENT WITHIN TRAINING AND TERTIARY INSTITUTIONS

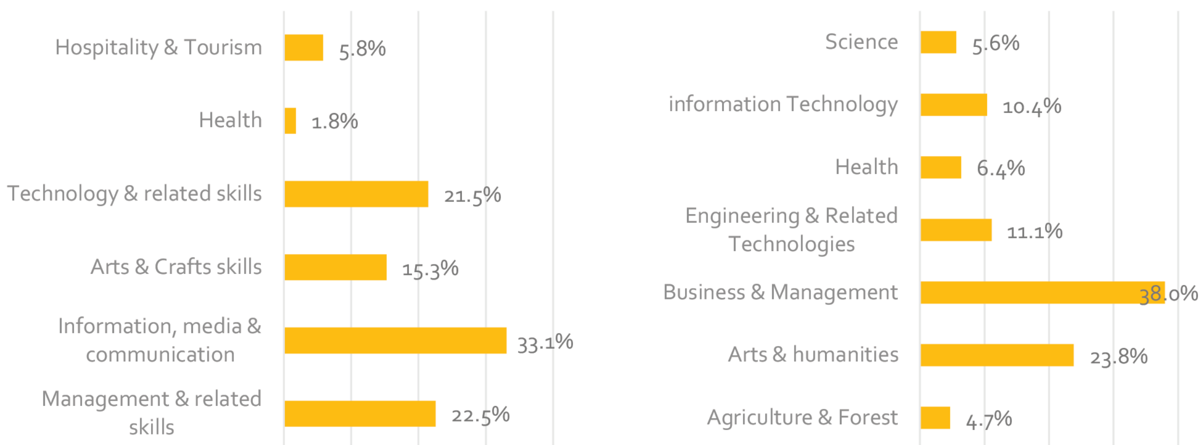
Graduate unemployment is a very recent challenge and can be attributed to the development within our industry as many of the organisations that generated employment for the university graduates, in the past, are now employing lesser graduates against the supply. Further, most students pursuing studies on their own lack information on labour market demand. The National HRD advisory 2014 indicated that about 4000 to 4500 graduates will enter to labour market annually in the 11th FYP period against about 2200 jobs requiring university graduate within the existing industries. Composition of graduate unemployment in both 2013 and 2014 was more than 30%. While tertiary education is expected to provide an individual with value education (Tertiary Education Policy 2010), the long-term success of any institutions and system of higher education hinges upon a higher degree of external efficiency, best captured by strategic alignments and making the courses offered by colleges and universities relevant with changing local, regional and global environment. In most developed economies, the higher education institutions are placing more emphasis on leadership and entrepreneurship skills and similarly developing economies are placing more emphasis on matching graduates to labour market and delivery of science and technology for creating new projects.

Tertiary education institutions in Bhutan are receiving greater pressure from the students and the industry to deliver programs that guarantees job. The Funding and Financing Mechanism for Tertiary Education 2013 intends to fund only viable programs and to create a greater dynamism within the tertiary institutions. A Tertiary Education Roadmap is being drawn up to bring reforms within the institutions and to address challenges with the tertiary education system.

TVET on the other hand is steadily emerging as an area of interest in many global debate and government priorities for education and national development agenda. Similarly in Bhutan, TVET is gaining momentum and political interest as it is seen as one of the key strategies for fostering employment and generation of much needed skilled workforce in the country. TVET is also seen as a driver of skills, knowledge, and technology needed to foster productivity and growth within our industry. Capacity, cost and efficiency are some of the issues that need to be addressed within the TVET sector. The Education Blueprint 2014 stresses access to TVET to be increased to 40% of the secondary graduates against the current figure of about 19% (totalling programs offered through formal and alternative mode of TVET delivery).

Both the tertiary education and TVET institutions have an important role to play in providing skilled and educated workforce needed by the economy. Currently a wide range of programs in the area of management, ICT, science and technology, health and others are being offered through these institutions as highlighted in the following figure. Bhutan currently has more than 80 TVET providers, two universities and 11 colleges. Most of the TVET and tertiary education programs are in generic field.

Figure 7: TVET program (left) and tertiary program (right) by broad field in 2014[1]



SCHOOL-TO-WORK INFORMATION

School-to-work information are those data on the kind of skills needed by employer (demand information) and the kind of employment found by the training and education graduates in the labour market (graduate tracer study). Though no school-to-work information is expected to be perfect, the information can be beneficial to the government, education and training providers, and the students themselves. While it allows for the government to evaluate on the overall performance on any HRD intervention and the performance to training/education providers in terms of relevancy of their course to the demand of the labour market, it enables the training and education providers to be dynamic to labour market requirements and preparing graduates for greater employability. For the students, the information can enable them to develop a clear understanding on which skills are in demand and what kind of jobs are available in the economy.

Most of the school-to-work information is currently being provided by the MoLHR. The demand information is currently being provided through the issue of annual labour market bulletin and job perspective information for secondary and tertiary graduates. These are mostly short-term immediate requirement in the labour market. Information on the medium-term and long-term

[1]Figure source: 3rd National HRD Advisory (left) and 2nd National HRD Advisory (right)

workforce requirements are none existence for both public as well as private sector. The MoLHR also issues annual HRD advisory with focus on specific labour market theme and labour force survey to assess workforce profile in the country. These advisory are shared with government, training and education providers and the students. Specific advices are provided to correct some of the labour market issues in the country.

Tracer studies for both the tertiary education graduates as well are TVET graduates are very weak. Information on graduate destination is not carried out either by the colleges, TVET providers or the TVET/tertiary governing body. The first beyond graduation survey was conducted by the MoLHR as part of the 2nd NHRD advisory work. A similar survey was carried out independently in 2014. In most cases, students fail to get access to information on the employment prospects on different courses.

SCHOOL-TO-WORK TRANSITION PROGRAMS

The MoLHR provides most of the school-to-work transition programs, which are mostly focused on young job seekers. About 20,000 to 25,000 jobseekers are expected to enter the labour market annually in the 11th FYP (1st National HRD Advisory series). Out of this, about 16,000 will be fresh out-of-school jobseekers with secondary and tertiary level education as indicated in the following table. Most of them, especially those with middle and higher secondary level education, will require skilling and re-skilling support so that they can be aligned with the requirement of the labour market.

Table 1: Forecast of secondary and university graduates entering the labour market (2016-22)

Qualification	2016	2017	2018	2019	2020	2021	2022
Class X[2]	3250	3314	3449	3445	3454	3373	2866
Class XII[3]	5964	5740	6191	6155	6580	6356	6495
University Graduates[4]	4486	5102	5498	6005	6511	6963	7470
Total	**13701**	**14155**	**15137**	**15606**	**16545**	**16692**	**16831**

[2]Calculated based on students enrolled in the primary education system. Assumption made based on existing trend: 20% of 10th grade and 10% of 11th grade will enter the labour market

[3]Calculated based on students enrolled in the education system. Assumption made based on existing trend: 40% of higher secondary students will enter the labour market

[4]Forecast made from 2nd National HRD Advisory projection of university graduates

The MoLHR provides different school-to-work transition program for the new entrants through short-term skilling and internship support. In the 11th FYP, Guaranteed Employment Program (GEP) was designed to match skilling and internship efforts to employment. A post-graduation skilling program called Graduate Skills Program (GSP) was designed to address skilling of increasing unemployment among university graduates. Entrepreneurship skilling support is also provided to those interested to set up their own business. Some of the school-to-work transition programs currently being implemented by the MoLHR are:

Internship/ skilling	Program title	Modality of delivery and approach
Skilling	Youth Employment Skills (YES)	Skills delivered in partnership with private and public providers; funding based on employment guarantee; targeted to jobseekers with middle/ higher secondary qualification; areas identified by providers through Rapid Market Appraisal (RMA)
Skilling	Graduate Skills Program (GSP)	Skills delivered in partnership with private providers; funding based on employment guarantee; targeted to jobseekers with university degree; skills area identified by providers through RMA.
Skilling	Skills for Employment & Entrepreneur Development (SEED)	Skills provided in partnership with in-country or ex-country providers; targeted to those aspiring entrepreneurs interested to set up their business; trainees put through entrepreneurship program post-skilling; skills focused on production sector.
Skilling	Apprenticeship Training Program (ATP)	Skills delivered based on request for apprentice from the Industry; wide range of industries and participants covered; implement through cost-sharing modality with the industry.
Skilling	Special Skills Development Program (SSDP)	Delivered in partnership with CSO, organization and local communities; targeted to special groups like women, disabled, disadvantaged, and others.
Internship	Pre-Employment Engagement Program (PEEP)	Targeted to middle/higher secondary and vocational job-seekers; maximum duration ranges from 3 months (fully funded) to 6 months (cost-sharing) with monthly minimum wage of Nu. 3750/- provided by MoLHR with flexible/voluntary top-up by the Industry, candidates explore internship with different industries or Industry request intern to MoLHR.
Internship	University Graduate Internship program (UGIP)	Targeted to university graduate job-seekers; maximum duration ranges from 3 months (fully funded) to 6 months (cost-sharing) with monthly minimum wage of Nu. 3750/- provided by MoLHR with flexible/voluntary top-up by the Industry, candidates explore internship with different industries or Industry request intern to MoLHR.
Internship	Direct Employment Scheme (DES)	Funding support based on Employment guarantee by the industry; Jobseekers attached with different sectors; Duration ranges from 1 to 3 years; Salary incentive provided by MoLHR with mandatory top-up of Nu. 3750/- by the Industry. University graduates: Nu. 7500/- Class XII/TVET graduates: Nu. 5250/- Class X: Nu. 3750/-
Skilling	Entrepreneurship training program (basic and advance level)	Provided to any individual interested to acquire entrepreneurship or business development skills for self-employment or setting up their business; training ranges from 14 to 60 days; post-training support is provided with licencing procedures and funding from financial institutions (which depends largely on the viability of business proposal).

KEY FINDINGS

KEY FINDINGS

Some of the major challenges highlighted frequently by the industries are the lack of experienced workers, the lack of internal resources to support training and development of their workers, and the lack of skilled and qualified workforce in the labour market. Employers also indicated high turnover due to lack of worker's commitment to the job and workplace. Some of the other workforce issues were the lack of technological innovation within the industry, wage rate disparity and high competition among the businesses. Employer also indicated that workers negotiated for higher salary and work flexibility.

The key findings highlighted in this section are summarized analysis of the sector assessment, focused group discussion, meetings and interview with key stakeholders and findings from the industry outlook and demand outlook results.

CRITICAL SKILLS SHORTAGE WILL CONTINUE TO BE AN ISSUE WITHOUT RIGHT INTERVENTION

Skill mismatch is a big concern in the country and this has been clearly demonstrated from the findings of survey conducted with the three sectors. While our graduates are not able to find a job, the industry themselves found it very difficult to get skilled and qualified people. In fact, more than 33% of the industries in all the three sectors said that they face skills shortage, meaning they are running under capacity. An overwhelmingly high number of them indicated that the skills they are looking for are not available in Bhutan and others said that talents are not available in their business location. Majority of industries said that this is having a big impact on the productivity and performance of their businesses. Many said that they were losing their market to their competitors and earning lesser income due to lack of right human resources to perform the jobs.

The skills gap is high particularly in the construction sector followed by production sector. The construction source huge number of foreign workers. Many industries sourcing foreign workers said that skills are not available in the country or individual with skills are not willing to take up the available jobs. Others said that foreign workers are cheaper, easily available and more efficient in getting the work done. Attrition within the sector is also very high. Considering that about 90% of the industries are small and cottage scale, many indicated attrition of 1-5 workers on average in the last three years. Many of them have left for similar jobs in a different organisation.

The three sectors highlighted the following hard-to-fill jobs, critical jobs and mission critical jobs. Hard-to-fill jobs will require interventions from the government as well as the industries in terms of making the job and workplace more attractive. Similarly, training providers will have to carry out stronger advocacy for these trades. The critical jobs are the areas where there is critical shortage in the labour market. Industries are simply not able to find talents for these jobs within their business location or in the country. Therefore, intervention in education and training is required. Mission critical jobs on the other hand are those jobs which will be in demand as long as the industry develops and grows.

The industries within the tourism and construction sector are homogenous. Tourism industry comprises of hotel, resorts and tour operator businesses. While construction sector has those businesses related to construction, maintenance of infrastructure. Wide range of businesses operates within the production sector. Therefore, some of the mission critical jobs identified in the production sector are relevant to only certain category of industry within the sector.

There are also cases wherein certain occupations are identified as hard-to-fill as well as critical and mission-critical. In the case of construction sector, mason has been identified in all the three categories and in the case of tourism, cook and F&B has been identified in all the three categories.

Table 2: Hard-to-fill, critical and mission critical jobs in the three sectors

	Tourism	**Construction**	**Production**
Hard-to-fill jobs	Food & beverage, cook, marketing officer, facility care taker, manager, housekeeper, tour operator, helper, reservation & ticket officer, specialized guide, Chef	Electrician, manual labourer, plumber, mason, construction machine operator, site supervisor, construction carpenter, civil engineer, heavy vehicle driver, welder	Carpenter, farm caretaker, food processor, livestock caretaker, manager, manual worker, marketing officer, mechanic operators, mining engineering, product designer
Critical jobs	Cook, manager, food & beverage, chef, language guide, guide, housekeeper, customer care officer, marketing officer, reservation & ticket officer	Mason, carpenter, welder, manual worker, construction machine operators, solid waste plumber, civil engineer, site supervisor, construction manager, electrician, traditional structure/house builders/ experts	Chemical engineer, metallurgist, chemist, fabricator, mining engineer, product designer, sawyer, marketing expert, carpenter, plant & machine operators, *Zorig* artisan
Mission critical jobs	Manager, cook, food & beverage, chef, housekeeper, customer care officer, ticketing & reservation officer, front desk, helper, guide	Mason, construction manager, site supervisor, plumber, manual worker, carpenter, electrician, civil engineer, welder, construction machine operator, traditional structure/house builders/experts	

HIGH JOB DEMAND FOR SKILLED WORKFORCE

Employment prospect in these three sectors looks very positive, provided there are right HRD interventions; the sector has potential to create employment for different skilled categories. The tourism sector will generate about 3900 jobs in 2016-18 and about 6500 jobs in 2019-22. The construction sector will create about 30,000 jobs in 2016-18 and about 33,000 in 2019-22 and the production sector about 2200 jobs in 2016-18 and about 2500 in 2019-22. The mechanisation in the construction sector will generate more high-paid and high-end jobs in construction trades. All three sectors will have high demand for skilled workforce requiring vocational or other form of skills training. There is also high demand for medium skilled and high skilled workforce.

Many of the industries have indicated expansion and diversification plan, which is expected to affect the current workforce requirement. More than half of these industries indicated that having right people with the right skills and qualification will be an important factor for them to see their expansion and diversification plan take shape.

Figure 8: Critical job demand in the three sectors by level of skills

CRITICAL SKILLS GAP IS A BIG CHALLENGE IN THE INDUSTRY

The MoLHR, since its inception, has accorded high priority on the HRD of all non-government sectors, which largely constitute the private and public-owned organisations. The first HRD master-plan for the private sector was drawn in the 9th FYP period. Commitment was made to allocate 50% of the total 9th FYP HRD Budget outlay for the sector though it was never materialised during the implementation of the plan. The need for a separate comprehensive HRD masterplan for the sector was felt necessary as the government recognised that majority of the prospective job seekers were not attracted to join the private firms and companies, though jobs were available in these sectors. The HRD support intervention was therefore, used as a means to enhance the human resource capacities of the sectors, enhance the employability of new generation of Bhutanese workforce, breed new generation of entrepreneurs, enhance the competitiveness of Bhutanese products both in the domestic and international markets, and contribute towards the achievement of the national goal of self-reliance and the national vision of Gross National Happiness.

Preparing a comprehensive HRD masterplan for the private sector has continued and evolved in the 10th FYP as well as in the 11th FYP period. The MoLHR also mobilises resources through the government and project funded assistance to implement the plan. Implementing the HRD masterplan for the sector has been a big challenge; first the lack of resource to implement specialised long-term trainings which requires huge budget and partnership with ex-country providers; second the inability of most industry and industry body to support in the training delivery process; lack of greater drive on the importance of focused HRD initiative from both the government as well as the industry themselves; and lack of information on the impact of the training and development initiative.

The MoLHR has been aspiring to take the role of a facilitator rather than an implementer of the HRD program. This has been somewhat realised for public owned corporations who set aside financial resource to build capacity of their workers, but it has been a big challenge for other category of industries since majority of them accord little to no priority on the training and development of their workers. Further the sector bodies which are mandated to provide HRD support to their member industries lack resources and has priority on other basic issues. It was clearly indicated that very little or no support is provided in terms of training and development. The sector also does not accord priority on the HR and workforce issues within their member industries.

It was noted that the firms themselves spent very little or no resource on capacity development of their workers. In fact the survey indicated that only about 13% of the industry has trained their workers in 2014 (the percentage being comparatively higher in tourism sector and least in construction sector), most of which were funded by an external agency with no cost on their part. It was highlighted several times that they see no motivation to train their workers since attrition within the industry is very high. Worker are easily able to find similar jobs in different organisation since there are critical shortages within the industry.

Though some of the sector or industry body provides training and development support to the member industries, very few have availed such support. Further, very few industries have benefited from the HRD support of the MoLHR.

While the industries by themselves, did not provide any training, most of them acknowledged the importance and benefit of the training. A very high number of industries indicated that the training has had positive impact on the confidence and performance of their workers and it has directly increased the overall performance and productivity of their business. All three sectors have outlined wide range of training requirements. These are the critical skills shortages within the existing workforce. Support through training and development will enable the sector to realize its full potential so that it can grow and sustains it business and ultimately generate steady employment for the economy. It has been wildly recognised that a strong and stable private sector equals good jobs in the economy for those with skills and required qualification.

Table 3: Skills gap in the three sectors

Sector	Skills gap
Tourism	Cuisine and cooking training, F&B, food safety & hygiene, front desk, guide training, hospitality & hotel management, housekeeping, specialised language training, ticketing & reservation, accounting, communication & customer care, facility maintenance skills, finance, first aid, HRM, IT skills, management, leadership, marketing, soft skills
Construction	Construction estimation, cost management, construction project management, material testing and calibration, quality & safety, green technology, machine operation, building finishing, HVAC, accounts, business management, finance, OHS, procurement, risk management, effective dispute resolution, tunnel/road/structure engineering, environment management plan and bioengineering, hydropower construction engineering, specialised plumbing technology, electrical engineering, geotechnical and spot hazard mapping, quality testing, environment impact and auditing
Production	Advance bakery, accounts, finance, e-business strategy, export strategy, food safety, HRM, hydrological analysis and planning, hydrological modelling, hydropower execution, leadership, management, livestock handling and care, supply chain management, water resource management, wood-work, product finishing, new product design and development, micro hydropower design, machine operation and maintenance, packaging technology, OHS

INDUSTRY'S LINKAGE WITH INDUSTRY BODY AND HRD INSITUTIONS

The industry's linkage with the industry body is quite impressive. More than 80% of the business establishments indicated that they are associated with either one or more industry bodies. However, the frequency of interaction between the individual business establishments and the industry body is weak. Many indicated that though they are member, they have not received any support from the industry body. Few others have said that they receive information on new tenders (construction), marketing strategies (tourism), and general information about the market. Though most of these industry bodies are mandated to provide some form of training and development support, very few have received such support since there are issue of fund with most of the industry bodies. They also have other priorities which weigh heavier than the workforce issues and challenges faced by their member businesses.

The industry's direct linkage with any of the training or tertiary education institution is negligible. Majority of the establishments saw no benefit of such linkages as they felt that it was irrelevant. Very few of them were aware of partnership in form of internship, apprentice or on-the-job training. They were also unaware of the influence they could have in making curriculum or content of any training or tertiary education program relevant to their needs.

Industry-institute linkages is one of the main strategies being adopted by both TVET and tertiary education provider to design courses/modules more relevant to the labour market needs. Most of these institutions have been liaising through the focal government institutions and the industry bodies to reach out to greater number of industries. While there are direct linkages with some of the prominent industries, those are mostly time-bound and ad-hoc in nature. Reaching the industries though the sector association could be a good strategy since majority of the business establishments are associated with the industry body.

COMMON RECRUITMENT PRACTICES

While skills and qualification for any job is vital, most industries indicated preference for individuals with specific sets of employable skills among others. Recruitment criteria were grouped into four; first personal characteristics which included attitude, personal appearance, physical strength and loyalty; second skills & competencies which included skills in communication, writing, problem solving, analytical thinking, customer relation and creativity; third qualification either at secondary, vocational or tertiary level; and lastly work experience in similar or different field.

Majority of the industries in all the three sectors indicated their strong preference to hire someone with attitude, loyalty, communication skills, customer relational skills, creativity among others. Majority of the tourism related industries indicated preference for those with communication, customer relation skill and commitment to work with the industry for longer term. Within the construction sector, work attitude was highlighted important.

On an all, it was clear that rather than hiring someone with the required skills and qualification, the industry prefer hiring someone who has work experience in similar field. This is indicative of industry aversion to train a person once hired. In fact, only handful of industries gives job orientation on hiring a new recruit. Rather they would hire an individual who can perform their job on day-one. Most industries indicated that qualification was the last factor that they looked at. However, there is no denying that a workforce with high skills and qualification would result in higher productivity within the industry. These workforces would also be able to multi-task and take up different job roles. For example, in the construction sector, an individual with bachelor in construction management can take up the roles of site supervisor, contract manager, general manager and procurement officer. Similarly in the tourism sector, an individual with Bachelor in Business Administration can take up the roles of finance officer, manager, procurement officer and marketing officer.

While the indication and preference is to hire an individual with prior work experience and competencies, industry demonstrated higher level of satisfaction with workers with higher skills and qualification. More than 80% of the industries indicated that they are satisfied with the competencies of graduates from the in-country training and tertiary education institutions. Therefore, as the industry grows and becomes stronger, we can expect greater employability preference for those with higher skills and qualification.

GENDER PREFERENCE AND NATURE OF EMPLOYMENT

The profile of workforce in the three sectors gives different indication on gender profile and type of employment. While there are thousands of jobs available in the construction sector, these are mostly contract-based since the construction firm are operational only when they get construction businesses sourced to them. More than half of the businesses indicated that they rely on the government sourced project to sustain their businesses.

The construction sector employs very less regular paid worker. Majority are contract or temporary workers. It employs about 600 female workers which constitute only 8.9% of the total national workforce (LFS 2014). This number has not evolved in the last one decade. Therefore, the nature of jobs in this sector is male dominated and mostly contract based.

Tourism on the other hand maintains almost equal ratio of female to male workforce as regular paid workers. The sector has mostly regular paid worker and lesser temporary workers. Similarly, female engagement in the production is at par with the male workforce. Most of them are engaged as own account/ family worker, meaning they are the proprietor of these businesses or are working in the family business. Very few female are engaged as regular paid worker, which indicates the industry's preference to employ male workers.

While there are policies in place to encourage higher female participation in the TTI programs, which are mostly in the construction trade, the industry's preference to hire male worker and the nature of jobs within the industry might put a female who have undergone the training in a disadvantage position. Therefore, understanding gender preference and nature of employment within the sector is important while designing any skills delivery intervention.

Sector	Gender profile	Nature of employment
Tourism	High female engagement	High number of regular paid workers and own accounts workers Lower number of temporary workers
Construction	Only 8% of the national workforce are female	High number of temporary workers Lower number of regular paid worker
Production	Higher female engagements as own-account or family workers Lower female engagement in regular paid jobs	

ECONOMIC PLANS DRAWN UP WITHOUT IMPLICATION ON WORKFORCE REQUIREMENT

Bhutan has different sector, regional and national development plans and strategies. The EDP was drawn up in 2010 and the economic plan is currently being reviewed. The current government has identified production, construction, tourism, SME and mining as the five jewels of the economy. Similarly the transport 2040 vision has been drawn up with plans to develop sophisticated road and transportation infrastructures in the country. All these plans are expected to have huge implication on the kind of human resources required to carry out the plans. The smooth and successful execution of these plans will require having right people at the right time for the right job. However, none of these plans are clear on the human resource implications, the kind of skills and qualification required and size of workforce required to carry forward the task. In most cases, it is left up to the HRD institutions to make assumptions on the number and kind of skills that will be required. Very often, these assumptions go wrong leading to under supply or over supply, thus causing unemployment of those with skills and qualifications.

During the 10th FYP, IT/ITES was identified as one of the priority sectors and major investment was made in the infrastructure development of the sector. The indication when the plan was drawn up was that there would be jobs in the sector because of which many students pursued bachelors in IT. In reality, the sector mostly created jobs for middle and higher secondary graduates with short-term skills training in graphic/design or communication. Many of those who had bachelors in IT were jobless. The sector currently requires IT graduates with specialised skill in software development and other areas, which are currently not available in the country. Therefore, the importance of complementing any development or economic plan with workforce requirement or human resource implication has not been realized or adopted by many planners.

WORKFORCE DEVELOPMENT STRATEGIES

WORKFORCE DEVELOPMENT STRATEGIES

STRATEGY 1: HIGHER INVESTMENT AND PRIORITY IN SKILLING

The MoLHR provides skills to about 2500 individual every year. The six Technical Training Institutes (TTIs) and the two Institutes for Zorig Chusum (IZCs) currently has an annual intake capacity of about 800 students. Others are trained through the alternative skilling programs such as Skills Training Program (STP), Apprentice Training Program (ATP), Special Skills Development Program (SSDP) and Village Skills Development Program (VSDP). These programs are implemented either in partnership with the private training providers or the industry/community.

In the 11th FYP period, approximately 20,000 to 25,000 job seekers from secondary and tertiary education institutions are expected to enter the labour market annually (1st NHRD Advisory 2013). About 16,000 of them will be fresh out of school with secondary and tertiary level education. Most of them will require some form of skilling or re-skilling support to smoothly transition and align themselves to the world of work. Currently, majority of these job seekers are trained through the STP program, which is a need based HRD intervention geared towards addressing the immediate HR requirement in the labour market. The main objective of the program is to provide employable skills to youth seeking employment in the private sector and to facilitate private sector development through supply of skilled workforce. Some of the STP initiatives in the 11th FYP are Youth Employment Skills (YES), Graduate Skills Program (GSP) and Skills for Employment and Entrepreneur Development (SEED). These programs are implemented in partnership with in-country and ex-country training providers and cater to wide range of job seekers with different qualification background.

Different policy intervention by the government and the industry is needed to address skills shortage in the country; hard-to-fill jobs will require intervention in terms of job redesign, developing clear job roles and responsibilities by the industry, and opportunity for attractive skilling initiative among others; Mission-critical jobs will require intervention to ensure that quality provider are there to constantly supply workforce in these areas; and critical jobs will require greater priority on skilling effort from both the TVET and tertiary education institutions and flexibility on access to foreign workers.

As indicated in the key findings, there will be high demand for skilled workforce requiring vocational and short-term skills training. In the short-term, the three sectors will require 1678 high skilled, 1497 medium skilled, 31829 skilled and 1610 low skilled workers. In the medium term, 2211 high skilled, 1836 medium skilled, 36820 skilled and 1773 low skilled workers are required. While the high skilled and some portion of medium skilled will be addressed by the tertiary education institutions, the skilled and other portion of medium skilled will have to be addressed though the existing skilling programs of the MoLHR.

Recommended actions	Key implementing agency	Timeline
Increase intake capacity of the existing TTIs for construction trades	DHR, MoLHR	By end of 11th FYP
Develop innovative skills delivery in the TTIs, and skilling program implemented in partnership with private providers	DHR, MoLHR	In 11th FYP and 12th FYP
Increase capacity of alternative skilling programs like STP and ATP to complement the formal TVET programs offered through the TTIs/IZCs	DHR, MoLHR	In 11th FYP and 12th FYP
Diversify and introduce programs which are critical shortage in the three sector	DHR, MoLHR	In 11th FYP and 12th FYP
Encourage establishment of private provider in areas where there is skills shortage	DOS, MoLHR	In 11th FYP and 12th FYP
Introduce higher level skills training in the TTIs	DHR/DOS, MoLHR	In 11th FYP and 12th FYP
Encourage accreditation of programs offered by the training providers for the three sectors	DHR/DOS, MoLHR	In 11th FYP and 12th FYP
Develop greater coordination between the training providers and industry through the industry body	Industry Bodies and MoLHR	By end of 11th FYP

STRATEGY 2: POSITION TERTIARY EDUCATION INSTITUTIONS TO BE RELEVANT TO THE LONG-TERM WORKFORCE REQUIREMENT

Tertiary education institutions have very important roles to play in the country. It has been widely acknowledged that countries that put higher investment on tertiary education have positive effect on the overall productivity of the workforce and growth of the industries. A quality tertiary education is essential for economics to move up the value chain in the production process. Further, expanding access to primary and secondary education will fuel growing demand for post-secondary opportunities within and outside the country. Quality tertiary education also has direct impact on the quality and it would raise the level of primary and secondary education system through supply of skilled workforce needed by these institutions.

The tertiary education institutions will have an important role to play in supplying relevant high skilled and medium skilled workforce in the country. While the existing demand is for skilled workforce over high skilled and medium skilled, with the development, strengthening and stability within the industry, more jobs will be generated for those having higher level of skills and qualification.

Recommended actions	Key implementing agency	Timeline
Complement economic development plans, sector development plans, investment plan or infrastructure development plans with clear workforce and skills requirements and implications	Respective sector agencies, GNHC, MoEA & MoLHR	In 11th FYP and 12th FYP

Develop mechanism within tertiary education institutions for greater flexibility to respond to labour market signals and demand	DAHE &RUB	In 11th FYP and 12th FYP
Develop mechanism within the tertiary education providers to collect and share data and analysis of tertiary education outcome	DAHE & RUB	In 11th FYP and 12th FYP
Encourage tertiary education to play greater role in lifelong learning	DAHE & RUB	In 11th FYP and 12th FYP
Develop greater linkage and partnership between the tertiary education providers and the industry bodies	DAHE, RUB & Industry body	In 11th FYP and 12th FYP

STRATEGY 3: COMPLEMENT EDUCATION AND TRAINING WITH EMPLOYABILITY SKILLS

In addition to the hard/core skills and qualification acquired through the TVET and tertiary education institution, additional skills are required to be competent in the labour market. These are globally termed as 'employability skills'. Employability skills are necessary for an individual for getting, keeping, and being successful in the job. They are also called generic and transferable skills, since it is relevant across different kind of sectors and industries. This should not be interpreted as to imply that employability solely depends on these skills but rather it would complement the 'skills and knowledge' thus strengthening individual's ability to be more competitive in the labour market. Some of the employability skills relevant across different sector and industries within and outside the country are highlighted below. Currently information and support on employability skills are neither available during training/education nor during transition to work. Some of employability identified by the industry are:

Critical and innovation thinking:	Creativity, entrepreneurship, resourcefulness, application skills, reflective thinking, decision making
Interpersonal/ Intrapersonal skills:	Communication skills, organisational skills, teamwork, collaboration, sociability, empathy, compassion, work attitude, loyalty & commitment, integrity, leadership, Self-discipline, ability to learn, independency, flexibility, mobility, adaptability, self-awareness, self-motivation, integrity, risk taking
Global citizen:	Awareness, tolerance, openness, respect for diversity, adaptability, intercultural understanding, ability to resolve conflicts, respect for environment
Media and ICT skills:	Ability to obtain and analyze information through use of ICT, express ideas through media and ICT, ethical use of ICT
Work experience:	Experience in similar field, generic work experience, internship

Recommended actions	Key implementing agency	Timeline
Make information on employability skills required to job seekers available through the employment service centres and career counselling unit with the training/ education institutions	DoE, MoLHR	In 11th FYP and 12th FYP
Assist job seekers in acquiring employability skills in partnership with private training providers	DoE, MoLHR	In 11th FYP and 12th FYP
Ingrain employability skill during training and education delivery within the training/education system	DoE, MoLHR in partnership with training and education providers	In 11th FYP and 12th FYP

STRATEGY 4: PROVIDE GREATER FOCUS ON ENTREPRENEURSHIP EFFORT

Entrepreneurship is seen as one of the strategies for fostering establishment of new industries and generation of new employment prospects in the country. With focused attention from the government in the production and the Small & Medium Enterprise (SME), coordinated intervention in skilling, establishment process and continued development support from different players are necessary.

Most countries facing unemployment and underemployment issue has realized that entrepreneurship development and support can be one of the important strategies for fostering new industries and new jobs. Bhutan has potential in this area with many untapped business opportunities.

Recommended actions	Key implementing agency	Timeline
Complement skilling effort with entrepreneurship development	DoE, MoLHR, training providers	In 11th FYP and 12th FYP
Develop and implement entrepreneurship camp among young (9 to 13 years of age)	DoE, MoLHR in partnership with primary schools	By end of 11th FYP
Provide training and development support to new enterprises	DHR/DoE, MoLHR	By end of 11th FYP
Develop a national entrepreneurship strategy	DoE, MoLHR	By end of 11th FYP
Foster establishment of Business Incubation centres in different occupation/trades	DoE, MoLHR	In 11th FYP and 12th FYP
Foster greater collaboration and cohesion among different entrepreneurship promotion and implementing agencies	DoE, MoLHR	By end of 11th FYP

STRATEGY 5: COLLECTIVE EFFORT IN IMPROVING JOB AND WORKPLACE

While comprehensive policy are there in place to improve the quality of tertiary education and TVET institutions, complementary policy should also be there in place to raise the quality of jobs and workplace. If industries do no create quality jobs and if existing workplace situation within the industry does not improve, the situation of graduate preference for government jobs will continue. The industries had numerous recommendations on resolving some of the existing workforce challenges, which came across clearly during dialogues and interview with the industry and sector bodies. While some of the recommendation has to be initiated by the Government, others can be tackled by the industry themselves. The industry indicated requirement for strong support for their workers training and development needs. Most industries, as inferred from the analysis and finding, are not in position to fund worker skilling, re-skilling and up-skilling initiatives. The industry body, with the exception of few, also lack fund to support training and development of their member industries. The MoLHR should provide strategic and greater support in workforce development in the economic sectors.

Other recommendations are to; develop a national wage policy with clarity on wages for different skills category; collective effort from the government, learning institutions and the industry to promote dignity of work at the workplace; and increasing internal management and workers motivation. The MoLHR needs to create stronger advocacy on occupational health and safety, employment rules, importance of human resource management and other similar areas.

Recommended actions	Key implementing agency	Timeline
Provide strategic and greater support for workforce development in focused economic sectors in the 12th FYP HRD masterplan of the MoLHR	DHR, MoLHR	In 12th FYP
Develop a national wage policy	MoLHR	By end of 11th FYP
Increase internal management and workers motivation	Industry/Sector body, Industries	In 11th FYP and 12th FYP
Redesign job roles and foster flexibility at work places	Industry/Sector body, Industries	In 11th FYP and 12th FYP
Promote 'skills for job and job for skilled' , dignity of labour, and pride for work and workplace	MoLHR in partnership with industry/sector body	In 11th FYP and 12th FYP

STRATEGY 6: STRENGTHEN HR DEVELOPMENT SUPPORT FOR THE ECONOMIC SECTORS

Skills gap has been highlighted as one of the biggest challenges in all the three sectors. Most firms are small and cottage scale with little to no resources to implement training and development programs for their employees. The prevalent issue of job hopping and high attrition has worsened industry's willingness to invest in training with the exception of very few large scale and medium scale firms. Majority of industries do not keep budget for re-skilling and up-skilling of their workforce. The sector association on the other hand have little resources which are thinly spread across many industries.

The MoLHR has been supporting HRD of non-government sector, which constitute the private, public owned, CSOs and other government delinked agencies. HRD masterplan is prepared in alignment with the FYP of the government. The implementation of the masterplan is heavily depended on external resources (project funded assistance) and bilateral and multilateral donor offers.

HR development of workforce can be used as positive intervention for attracting talents and fostering new learning opportunities which can have impact on the productivity and performance of the worker/organisation in particular and the nation at large.

Recommended actions	Key implementing agency	Timeline
Implement skills gap areas under the 'HR Development for private sector' program	DHR, MoLHR	In 11th FYP and 12th FYP
Develop mechanism for MoHLR to support industry body in providing training and development needs of their sector	DHR, MoLHR	In 11th FYP and 12th FYP
Develop innovative programs that can be implemented in partnership with employers to address their workers up-skilling needs	DHRR, MoLHR	In 11th FYP and 12th FYP
Recognize in-service HRD support as a strategy for private sector development	RGoB	In 11th FYP and 12th FYP
Support Life-long learning through re-skilling and up-skilling support	All training and tertiary education institutions	In 11th FYP and 12th FYP
Support up-skilling and higher learning support through cost-sharing mechanism	DHR, MoLHR	In 12th FYP

STRATEGY 7: FOREIGN WORKERS APPROACH

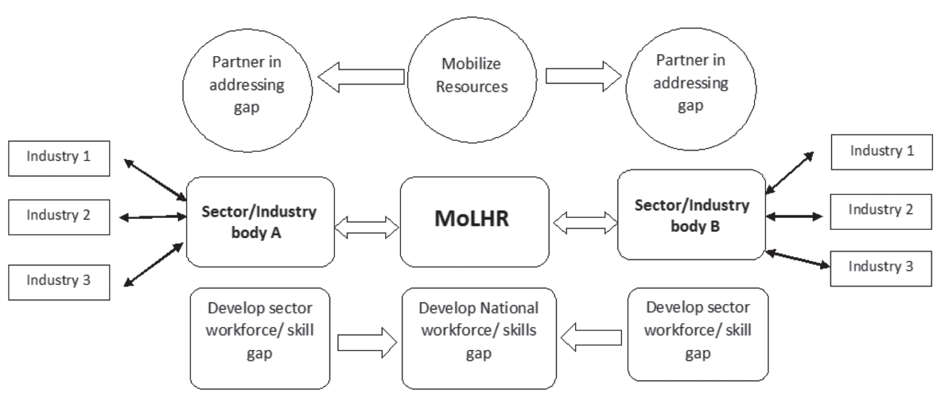
The skills shortage within the construction sector is one of the highest and will take long time and effort to address, while skills shortage in the tourism and production sector can be easily addressed with proper skilling interventions. The three sectors are expected to create about 37,000 jobs in short-term and about 42,000 jobs in the medium-term, majority of which will be in the construction sector. While the supply of skilled individual are being churned out of the TVET and tertiary education institutions, the supply will fall short of labour market needs.

Recommended actions	Key implementing agency	Timeline
Develop mechanism to collect information on skilled workforce supply for guided decision making in foreign workers approval	MoLHR	By end of 11th FYP
Develop mechanism to share foreign workers information to HRD agencies, TVET and tertiary education providers for necessary interventions	DoL, MoLHR	By end of 11th FYP
Prioritise skilling effort to replace and discourage foreign workers in high skilled, medium skilled and skilled	DoL, MoLHR	In 11th FYP and 12th FYP
Consider sourcing of foreign workers in critical job category only	DoL, MoLHR	In 11th FYP and 12th FYP
Maintain the existing foreign workers ceiling for construction sector and discourage foreign workers in non-construction sector	DoL, MoLHR	In 11th FYP and 12th FYP

STRATEGY 8: IMPROVE WORKFORCE PLANNING PROCESS

Institutionalising the national workforce planning and development effort requires greater commitment from the government, considerable financial resources and collaboration among different stakeholders. While no workforce demand data is expected to be perfect, it provides an important guide for the government to make appropriate policy decision, for the TVET and tertiary education provider to design appropriate courses, and for students to assess labour market requirements which they can base their decision on. A comprehensive national strategy for the development of workforce planning information bases will ensure that right information and decision are made over time. There is need for collaborative efforts on development of an appropriate strategy for ensuring that relevant qualitative and quantitative information for the development of workforce plan is available. Policy support, areas of cooperation, and role of stakeholders needs to be defined through intensive dialogues. Such forward looking strategy will increase the complementarities of intervention and reduce the risk of isolated efforts and wasted investments. There is also need to develop capacity of different players, industry body and workforce planning body, partnership agencies in gathering skills requirement, consolidating and analyzing data.

Figure 9: Workforce plan information and support flow



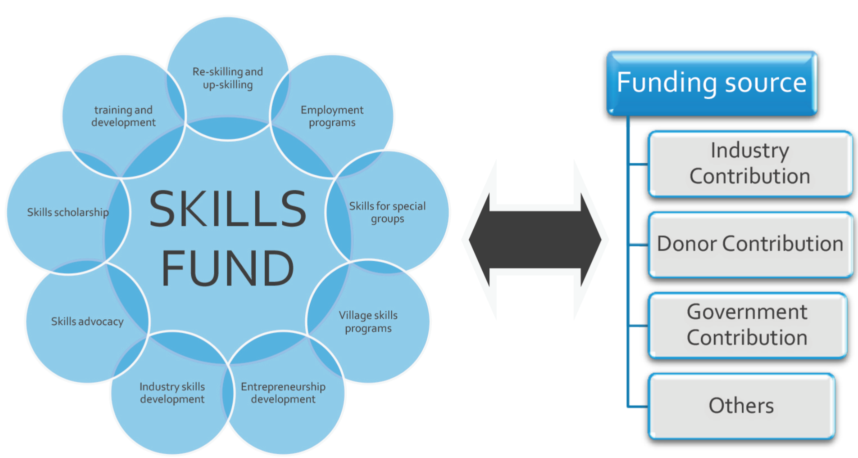
Recommended actions	Key implementing agency	Timeline
Institutionalise mechanism for collecting workforce and skills needs data from sector/industry body	MoLHR	In 11th FYP and 12th FYP
Institutionalise mechanism for beyond graduation survey for TVET and tertiary education graduates (six months, 2 years after graduation)	MoLHR in partnership with training and tertiary education providers	In 11th FYP and 12th FYP
Make short-term, medium-term and long-term demand assessment available to all career counselling units, tertiary education and TVET institutions	MoLHR	In 11th FYP and 12th FYP
Increase sector/industry body's engagement in workforce development	Sector/industry body	In 11th FYP and 12th FYP
Built partnership and collaborative approach to workforce development	MoLHR, sector/Industry body, training & tertiary education providers	In 11th FYP and 12th FYP
Institutionalise school-to-work transition information to students, education providers and training providers	MoLHR	In 11th FYP and 12th FYP

STRATEGY 9: DEVELOP A SUSTAINABLE FUND FOR SKILLING EFFORT

The need for a human resource development fund was felt necessary during the development of the 9th FYP HRD masterplan of the MoLHR. Subsequently, proposal for establishment of similar fund under different titles (TVET, skills or employment fund) has been proposed in the Employment Policy as well as the TVET policy. The intention behind having a skilling, TVET or employment fund is felt due to the ad-hoc nature of way skills are funded. In the 9th FYP, more emphasis was provided to the in-service HRD which was largely supply oriented and funded through bilateral and multilateral donor ad-hoc offers. The first project for 'HRD of the private sector' was initiated through Sustainable Development Agreement (SDA) with fund of Nu. 3 million, which later continued in the 10th FYP with increased fund of Nu. 30 million. In the 10th FYP, World Bank supported skilling initiative specifically for the IT/ITES sector. Over the years, focus has shifted more towards school-to-work transition programs, with increasing number of unemployed youth entering the labour market. In the 11th FYP, these programs are mostly funded through project tied assistance from the Government of India (GOI). The GOI also funds the Guaranteed Employment Program (GEP) with the MoLHR.

All skilling initiative are project based, meaning they are time bound and target oriented. Once the project is complete, new source of fund needs to be secured for carrying forward the skilling initiatives, which by no means is guaranteed. Therefore, there is a need for a sustainable fund for skilling effort in the country, if the number of increasing skilled and qualified workforce requirement from the Industry is to be met. The fund should cater to diverse range of programs and diverse range of beneficiaries including those requiring re-skilling and up-skilling support.

Figure 10: Skills fund for diverse programs and beneficiaries



Recommended actions	Key implementing agency	Timeline
Develop modality, approach and implementation of 'Skills fund'	MoLHR	By end of 11th FYP
Initiate establishment of the 'Skills fund'	MoLHR	In 12th FYP

RECOMMENDED PROGRAMS & INSTITUTIONS

RECOMMENDED PROGRAMS AND INSTITUTIONS

TOURISM

Programs/institutions	Existing	Recommendation
Royal Institute for Hospitality and Tourism (RITH)	Diploma in Hospitality and Tourism	Upgrade to Tourism and Hospitality College Offer bachelors program in Hospitality Management, Tourism Management, and Chef Specialized 6-12 months PG diploma/ certificate program in cuisine/cooking, bar-tendering
Private training providers (existing: BISHT, Bondey Institute, Yarab Institute)	Certificate training in Front Desk, F&B, Housekeeping, cooking and bakery	Provide accredited certificate and diploma programs in front desk, F&B, housekeeping, cooking, bakery, specialised culinary arts, event management, ticketing & reservation, travel & tour package design and management, language training, eco-tourism, community tourism, specialised guide training
Apprentice Training Program (ATP)	Ah-hoc as and when there is demand from the industry	Provide planned support to the tour operators in areas of hiking, bird watching, geographical expedition
Skills Training Program (STP)	Partnership with private training providers and funding support provided for training in front desk, F&B, housekeeping, cooking and bakery	Expand partnership with ex-country training providers in critical training areas Expand partnership in provision of non-viable skills program with private training providers
Department of Adult and Higher Education (DAHE)	Provides about 250 annual ex-country training scholarship for higher secondary graduates	Provide support for: 1. Bachelor in Hospitality Management, 2. Bachelor in Tourism Management, 3. Bachelor in Chef
In-service HRD programs	Support provided as per the HRD Masterplan of the MoLHR Support provided by TCB through its training unit	Explore training and development support mechanism through the industry bodies Prioritised training in critical skills gap requirement identified by the industry

CONSTRUCTION

Programs/institutions	Existing	Recommendation
College of Science and Technology (CST)	B.E Civil Engineering, B.E Electrical Engineering	Provide internationally certified Masters' program in structural engineering, civil engineering, and electrical engineering Provide specialised 6-12 months PG diploma/ certificate program in road engineering, hydropower engineering, structural engineering, building designing, environmental engineering Add traditional structure/house construction into engineering curriculum
Jigme Namgyel College	Diploma in Civil Engineering, Diploma in Mechanical Engineering, Diploma in Surveying	Increase intake capacity Provide life-long learning opportunities for those engaged in the sector Provide bachelor in Power Engineering and Geo-technical Engineering Provide short-term specialised courses in surveying
TTI (Chumey, Dekiling, Khuruthang, Samthang, Rangjung)	Carpentry, masonry, plumbing, welding, electrical, mechanical, mechanical fitter, welding & fabrication, automobile mechanics, heavy vehicle driving (503 graduated in 2015)	Increase intake capacity Introduce specialised short courses in construction trades Provide higher level trainings (diploma) Accredit courses offered by TTIs Provide structured on-the-job training with major construction project through the industry bodies Introduce new courses in construction machine operation and traditional house/structure construction Add construction entrepreneurship modules
STP	Partnership with private providers to offer trainings not provided by the TTIs (Eg: site supervision training)	Provide short-term immediate requirement training in partnership with local and external training providers Enhance intake capacity

ATP	Ah-hoc as and when there is demand from the industry	Planned support for ATPs in mega government funded construction projects (hydro-power, infrastructure and building construction) in areas of tunnelling, Explore ex-country ATP in tunnelling engineering, railway engineering, ropeways, sewerage engineering, aviation
Internship programs	Direct Employment Scheme (DES) and short-term internship programs	Design salary incentive mechanism for the hard-to-fill jobs.
In-service HRD programs	Support provided as per the HRD Masterplan of the MoLHR	Explore training and development support mechanism through the industry bodies Prioritised training in critical skills gap requirement identified by the industry

PRODUCTION

Programs/institutions	Existing	Recommendation
College of Natural Resources (CNR)	Agriculture and forestry programs (both bachelors and diploma)	Add entrepreneurship modules with the training in agro processing
Rural Development Training Centre (RDTC)	Livestock training	Advocate program to attract young job seekers Provide livestock/farm management training Collaborate with MoLHR to provide skilling and training/development support Accredit program in accordance to BVQF
National Post-harvest centre (NPHC)	Post-harvest training	Advocate program to attract young job seekers Provide entrepreneurship skills Diversify training areas Collaborate with MoLHR to provide skilling and training/development support Accredit program in accordance to BVQF
Skills training fellowship		Explore fellowship support in various production fields with entrepreneurship competency component

STP	Short-term in-country and ex-country training for critical sectors	Expand and strengthen SEED program for employment and development of new businesses in the production sector
Power Training Institute (PTI)	Not operational	Provide specialised program in: 1. Hydro-power engineering, 2. Water resource management, 3. Hydrological analysis and planning, 4. Hydrological modelling, 5. Hydro-power execution, 6. Micro hydro-power design and implementation, 7. Geomatics engineering and application, 8. Disaster management, 9. Hydro-power operation and maintenance, 10. Controls and instrumentation, 11. Wind power technology, 12. Solar power technology
College of Arts and Crafts	Proposal drafted	Provide high skilled training in any 13 traditional arts and craft skills Provide contemporary arts and design programs
Sherubtse College	Arts and humanities programs	Provide: 1. Bachelors in CG & Animation, 2. Bachelors in IT (with specialisation in software development) Add script writing, screenplay writing and creative writing into BA English program
In-service HRD programs	Support provided as per the HRD Masterplan of the MoLHR	Explore training and development support mechanism through the industry bodies Prioritised training in critical skills gap requirement identified by the industry

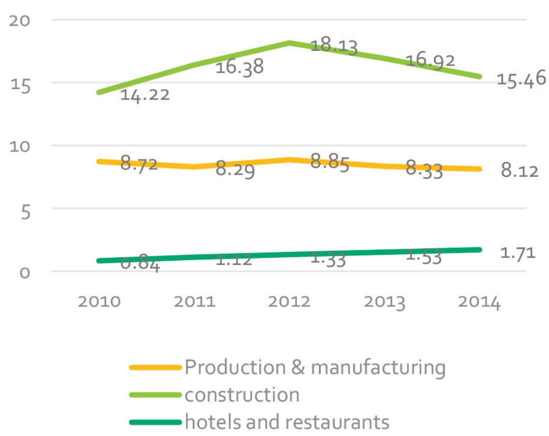
SECTOR OUTLOOK AND DEMAND

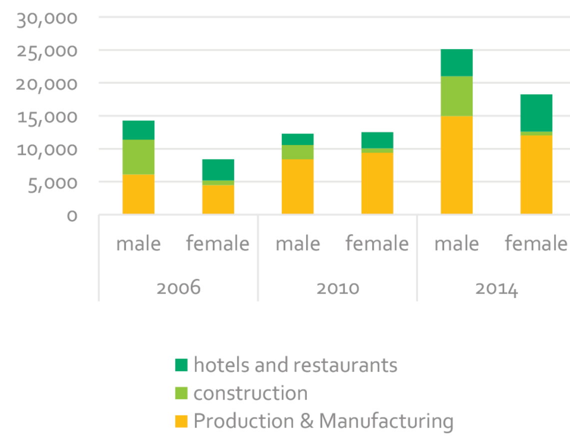
SECTOR OUTLOOK AND DEMAND

Tourism, construction, and production has been identified as one of the priority sectors in the EDP based on their growth and employment prospect. Tourism will be guided by 'high value low impact' policy and efforts will be made to encourage and promote tourism throughout the year and used as a means to diversify economic activities in the rural areas (EDP 2010). Construction is one of the fastest growing sectors contributing 15.46% to the GDP (2014) and this sector will see requirement for very high skilled workforce with new construction projects, hydro-power construction and the implementation of strategies highlighted in the Bhutan Transport 2040. Similarly, the production sector is also gaining momentum, especially in areas of agro-based and value added production. The Business Opportunity and Information Centre (BOiC) has specifically placed emphasis in fostering establishment of new businesses in the production sector and supported more than 100 entrepreneurs with focus on agriculture and livestock. Therefore in the next few years Bhutan can expect to see development of many small and medium businesses in agro and food based production.

The GDP share of these three sectors has been consistent over the last few years. The construction sector's share to GDP has been steady within the range of about 16%. Production and manufacturing sector contributed about 8% and hotel and restaurants about 1.7% in 2014. Higher sector contribution to GDP share has not necessarily translated to job generation. While hotel and restaurant share to GDP is comparatively lower, workforce engagement in this sector is seeing an increasing trend and is higher than the construction sector. There is also a big increase of workforce engagement in the production sector. While we see negligible female employment in the construction sector, the hotel and restaurant employs higher number of female workforce. Despite the fact that Bhutanese workforce engagement in construction sector is low, it does not mean that the sector is not generating jobs. In fact, the sector imports the highest number of foreign workers to meets the skills shortage.

Figure 11: % share to GDP at current price (left) and workforce engagement by gender in three sectors (right)





In this section, we will look at the industry outlook and demand outlook in the three sectors differently. Industry outlook covers profile of the industries, recruitment practices and the industry's linkages with sector bodies and tertiary/TVET institutions. The demand outlook will provide clearer understanding on the critical jobs and capabilities in the three sectors with analysis on implication of skills shortage and skills gap.

Capacity of more than 2800 industries representing the three sectors was built in 'HR planning and forecasting'. The two-day training provided participants with skills to assess skills shortage and skill gap within their organisation and created awareness on the workforce terms used in the employer survey. More than 3000 industries participated in the survey and survey data for 2471 industries (840 construction, 790 tourism and 841 production establishments) were used for the analysis and findings.

In assessing the critical job demand for 2016-18, the figures collected from the surveyed industries have been extrapolated to the actual number of industries within the sector. In assessing the critical job demand for 2019-22, growth of new establishments within the existing sector was considered. Similarly training and development requirement has been accounted for actual number of workforce in the sector.

TOURISM SECTOR

TOURISM SECTOR

INDUSTRY OUTLOOK

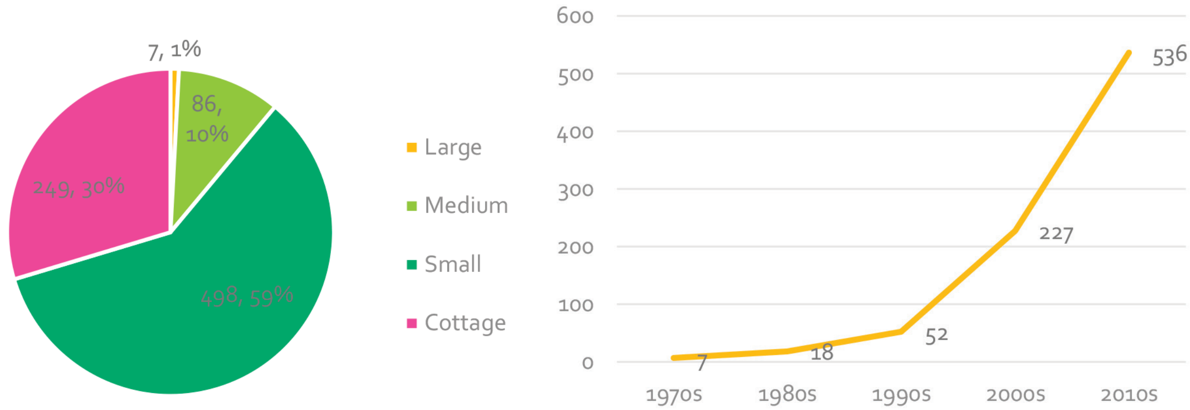
SECTOR PROFILE

Currently there are about 1200 licensed tour operators out of which 527 are registered with Association of Bhutanese Tour Operators (ABTO), a mutual benefit organisation registered under the Civil Society Organisations Act of Bhutan. 34 tourism related businesses are registered under the Company Act of Kingdom of Bhutan and 139 hotels and resorts are certified by the Tourism Council of Bhutan (TCB) as tourist standard hotels. Similarly TCB has certified 10 tourist standard bars. In total there are roughly about 1500 licensed business establishments in the tourism sector.

A total of 840 tourism establishments participated in the employer survey which constitutes a large share of the tourism industry. While more than a thousand tour operators are licensed, most of them are one-person run business operations without any formal setup, operational as and when they get clients. The survey indicates that 1% of the surveyed industry are large scale, meaning they employs more than 100 individuals; 10% are medium scale employing between 20 to 99 individuals; 59% are small scale employing between 5 to 19 individuals and 30% cottage employing 1 to 4 individuals.

Tourism sector started receiving greater attention and drive post 1990s with the initiation of 'high value low impact' policy. Many businesses and establishment were set up to cater to the growing number of tourist arrival in the country. In fact, about 133,000 tourists arrived in the country in 2014 against 40,000 in 2010. The EDP 2010 highlights the importance of further strengthening the sector by bringing development in high-end health services, traditional medicines, establishment of festivals and spiritual centres and development of performing arts services. The sector is considered as one of the most important after hydropower, for its growth and employment prospect. As indicated in the following figure, there has been drastic growth in the number of establishments in the tourism sector. From the surveyed industries, 7 establishments were licensed and operational in 1970s, 18 in 1980s, 52 in 1990s, 227 in 2000s and 536 in 2010s, indicating growing number of establishments over the years.

Figure t1: Tourism industry by scale of business (left) and year of establishment (right)

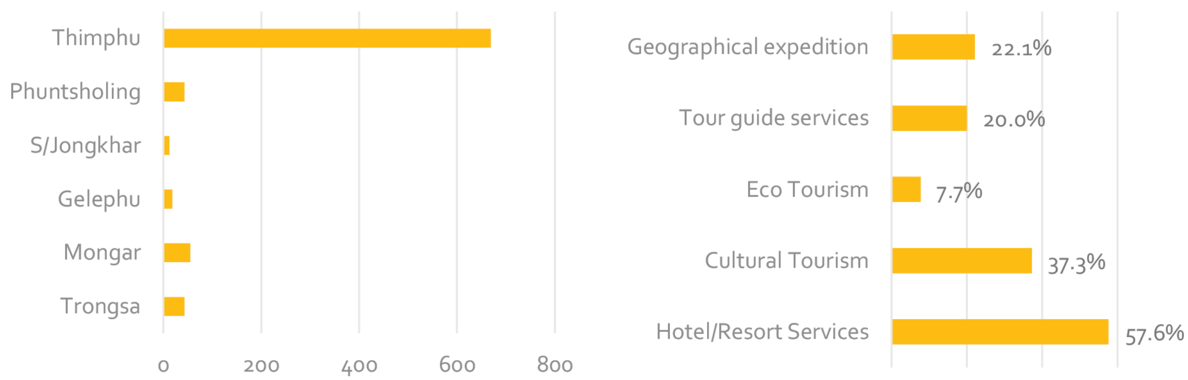


The 20 districts are divided into 6 regions for this study. Thimphu region includes those businesses in Thimphu, Paro, Wangdiphodrang, Haa, Gasa and Punakha; Phuntsholing regions includes those businesses located in Samtse and Chhukha; Gelephu region includes Dagana, Sarpang and Tsirang; Tronga region includes Trongsa, Bumthang and Shemgang; Samdrup Jongkhar region included Samdrupjongkhar and Pemagatsel; and Mongar region includes Mongar, Trashigang, Trashiyangtse and Lhuentse.

Majority of the tourism related businesses are in the Thimphu region. Very few businesses are operating in the other five regions. 38 businesses have indicated that they have their business office located in more than one district. More than half of tourism industries are engaged in hotel and resort services and the other half is engaged in tour operator businesses. 37% are engaged in cultural tourism related activities. Around 20% of them are engaged in tour guide services and geographic expedition services. A very small portion of them are engaged in eco-tourism.

The commission of three domestic airports in South, Central and East and the development/ construction of new services and infrastructure in these regions is expected to foster benefit of tourism sector in regions outside Thimphu. The sector has also been identified as one of the five jewels and initiatives are being drawn up to achieve higher yields with increased tourist arrival thought-out the year. Therefore, businesses are expected to increase in the sector to cater to growing number of tourist arrival.

Figure t2: Tourism industry by regional location (left) and area of business engagement (right)



An assessment was made to see the profile of workforce by gender, level of qualification, nature of employment and category of work engagement. As highlighted above, about 89% of the tourism industry is small and medium in nature, therefore, most businesses have employment within the range of 1 to 9 workers.

The sector has larger share of female workforce engagement, which corresponds to the result of the LFSs conducted by the MoLHR. There is an indication of lower employment for the vocational graduates, which can be attributed to the fact that most tourism and hospitality related training providers were established post 2010. Currently Bhutan has four hospitality related training institutes; three are located in Thimphu and one in Paro. The Royal Institute for Hospitality and Tourism (RITH) offers diploma program in hospitality and tourism for 50 students annually, whereas the other three providers provide series of short-term certificate level trainings in areas required by the industry. Most of these short-term training are funded by the MoLHR. In subsequent years, there will be higher number of skilled workforce in the industry with greater number of trained human resources being churned out by these training institutes.

The industry employs comparatively good number of workforce with tertiary level qualification against the low number across other sectors. The situation is expected improve with more students perusing tertiary education and entering the tourism sector. Tourism sector employs comparatively higher number of managerial and professional level occupation category against other occupational category.

Table t1: Workers by qualification and gender (top) and by occupational category (bottom) in industry

No of workers	female	temporary worker	vocational	degree	masters'	IX & below
1 to 4	46.2%	60.4%	24.0%	45.8%	34.5%	32.1%
5 to 19	38.6%	17.6%	2.7%	3.8%	5.7%	2.4%
20+	4.8%	3.0%	0.4%	0.5%	0.0%	0.0%

No of workers	managerial	professional	technician	clerks	craft & related workers	manual
1 to 4	72.4%	41.5%	20.7%	8.0%	9.8%	15.5%
5 to 19	10.8%	0.8%	1.0%	0.6%	1.3%	0.6%
20+	0.5%	0.4%	0.1%	0.0%	0.0%	0.0%

RECRUITMENT PRACTICES

While information on the critical jobs can guide training and tertiary institutions in the development and reform in courses and curriculum, a good understanding on the recruitment practices and criteria can help design program and skills that will enable an individual to be job ready. Recruitment criteria have been broadly classified into four; personal characteristic, skills and competencies, qualification and work experience.

Most area of work under the tourism sector requires some form of direct interaction with the customers and clients. Tour operators and guide deals directly with the tourist; and individuals working in housekeeping, front desk and food & beverage services interact directly with the customer. Therefore, it is no surprise that qualities in communication and customer relation have been identified as one of the main skills sought for while hiring an individual. Attitude, loyalty and commitment has been identified as core characteristic required during hiring process. In fact, this has been highlighted as one of the challenges within the existing workforce due to which businesses are not able to retain their experienced workers.

While most businesses have indicated low level of importance on qualification, a higher skilled or qualified individual is expected to be more productive compared to those with lower skills. These individuals can also multitask and carry out different roles. For example, an individual with university degree in commerce or business management can simultaneously take-up the role of an accountant, finance officer, procurement and store keeper and a general manager.

Most industries have highlighted the importance of having experience in same field while hiring a new recruit. This is especially true for specific occupation requiring specialised task such as guiding, cooking, housekeeping among others. While general experience or work experience in different field would give them an understanding of the work culture, having experience in the same field would mean that the hiring business will have to make lower or no investment in training the individual for the job.

Over all, work experience has been ranked above others as the number one criteria while hiring an individual, followed by skilled and competencies and personal characteristic.

Figure t3: Ranking of different recruitment category

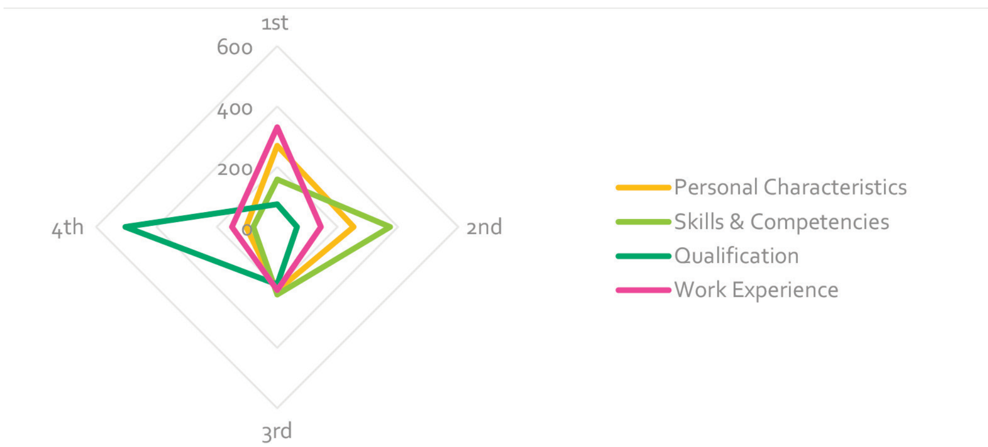


Table t2: Level of importance on different recruitment criteria in tourism sector

	not important	moderately important	very important
Personal Characteristics			
Attitude	1.7%	17.7%	78.9%
Personal appearance	8.9%	48.9%	40.1%
Physical strength	7.1%	42.9%	48.1%
Loyalty & commitment	0.4%	13.0%	84.8%
Skills & Competencies			
Communication	0.6%	12.0%	85.8%
Writing	4.0%	39.4%	54.8%
Problem solving	2.0%	32.0%	63.6%
Analytical thinking	2.6%	33.7%	61.7%
Customer relations	0.5%	11.7%	86.4%
Creativity	1.2%	33.0%	64.3%
Qualification			
High school	5.5%	45.5%	46.8%
vocation/technical	16.3%	46.1%	34.5%
Degree	23.8%	47.4%	25.5%
Masters'	28.9%	39.3%	29.4%
Work Experience			
in same field	1.9%	18.2%	77.0%
in different field	10.4%	45.7%	40.6%
general experience	4.6%	32.9%	60.1%

LINKAGES AND ASSOCIATION

Some of the sector body in the tourism industry are BCCI, TCB, ABTO, Guide Association of Bhutan (GAB), and the Hotel and Restaurant Association of Bhutan (HRAB). Most of these sector associations are associated with BCCI since it represents the larger private sector and take active role in bringing policy intervention and changes required for the private sector development. The sector association submit their collective issue to the BCCI, who in turn collectively submits for further deliberation and intervention to the government.

The TCB develops national tourism policy and strategy; facilitate coordination among different stakeholders, carries out active promotion, and advocacy of tourism services and products. The TCB also develops new tourism product and services and carries out HR development activities for the industry. The GAB, ABTO and HRAB cater to their respective industry needs. Sometimes they act as the bridge between the industry and the bigger industry body or government. Frequent information sharing and collaboration activities are carried out.

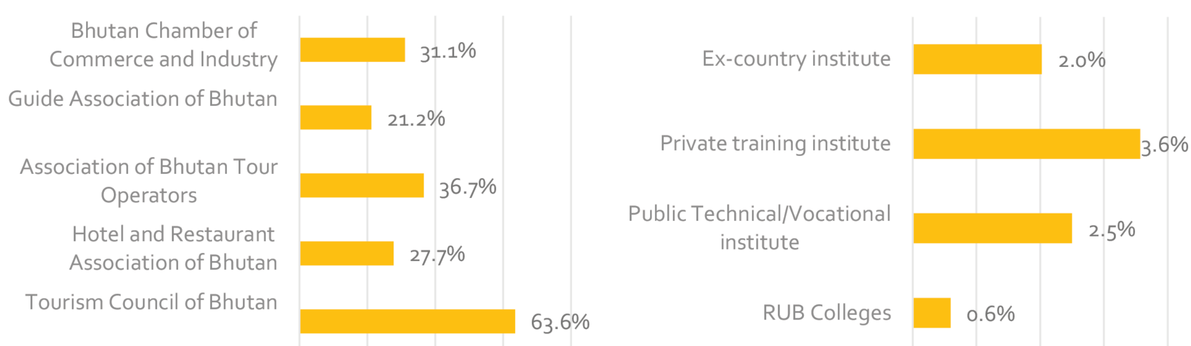
80% of the industries surveyed have indicated that they have formal association with one of the industry/sector bodies. A good number of industry are associated with the TCB which is expected since TCB caters to all types of businesses in the tourism sector, whereas association like HRAB caters specifically to hotel businesses, GAB to guides and ABTO to tour operators. BCCI on the other hand is the oldest sector body and caters to all kind of industries in the private sector. Most of the industries stated that they are able to access information on marketing, training and sector related agenda from these industry bodies.

On the other hand, industry's direct association or linkage with the training and tertiary institution is very poor. Linkage with tertiary institutions, the public training institutes and ex-country provider is negligible. This is expected since the country, currently, does not have any tertiary institutions directly catering to the needs of the sector. The public TTIs on the other hand provides mostly construction, arts and craft and other technical courses. 3.6% of the industry indicated that they have linkage with private provider, which means their association with Bhutan International School for Hospitality and Tourism (BISHT), Bondey Institute of Hospitality and Tourism, and Yarab Institute for Hospitality Management. While the latter two were established recently, BISHT was established in 2010, right after the launch of the Establishment Regulation. Most hotel industries have indicated their linkage with BISHT. This is clearly a positive indication of various employment based training being implemented by the MoLHR through BISHT. Under the employment-based training support, institutes are required to actively liaise with the industry to identify training areas and post-training placement of the candidates for employment. Students from BISHT are also sent for on-the-job training to various hotels and resorts.

Industry institute linkage is a priority for most training and tertiary education institutions. The main objective of such linkage is to improve relevancy of the program and to close the skills gap. With the growing concern over youth unemployment, many training and tertiary institution are pursuing this as a strategy to improve their training and education delivery. The practice with most training or tertiary education providers is that instead of liaising directly with all industries in the sector, they approach the sector body which represents the larger industry. Therefore, it can also be explained why there are only few industries that liaise directly with the training or tertiary institutions.

Those industries that said that they have some form of linkage were asked to specify on the area of linkages they have, and those that did not have any linkages were asked if there were any areas where they might want to explore linkages in. However, most industries could not provide any information on this since they were unsure on the requirement or benefit of such linkages. Many indicated that industry's linkage with either training or education provider is not relevant and they could not identify new areas where linkages could be established.

Figure t4: Association with industry body (left) and linkage with HRD institutions (right)



The industries were asked on the frequency of support provided by the industry body on training and development support. They were asked if the industry relay any human resource related issues for discussion and deliberation at the association level. Most indicated that support was provided mainly for short-term training. Agencies like BCCI and TCB provides regular short-term training support to the industry. BCCI has a Human Resource unit which caters to private sector training support and TCB on the other hand has a training unit which provides training for the workforce engaged in the industry. TCB regularly conducts various in-country trainings for the sector. A good number of industries are also receiving long-term training support. It is impressive to see that almost 20 industries have indicated that they have received frequent support in terms of long-term training and development. There were also those who have taken up human resource issues within their organisation for support from the association.

Table t3: Level of support by industry body on training and sector HR

level of support	short-term trianing	long-term training	HR issues
No support at all	193	397	340
Little support	241	99	164
Moderate support	131	120	101
Frequent support	21	20	28

Industries were asked to evaluate the general competencies of graduates coming out from the training and tertiary education institutions. Competencies in this context was explained as the ability of graduates to perform in their job based on the skills and knowledge that they have acquired during training or education. About 80% of the industries have indicated that the graduates from the RUB colleges, TTIs and private training providers are competent to perform jobs in the sector.

Table t4: Industry's level of satisfaction with TVET/tertiary graduates

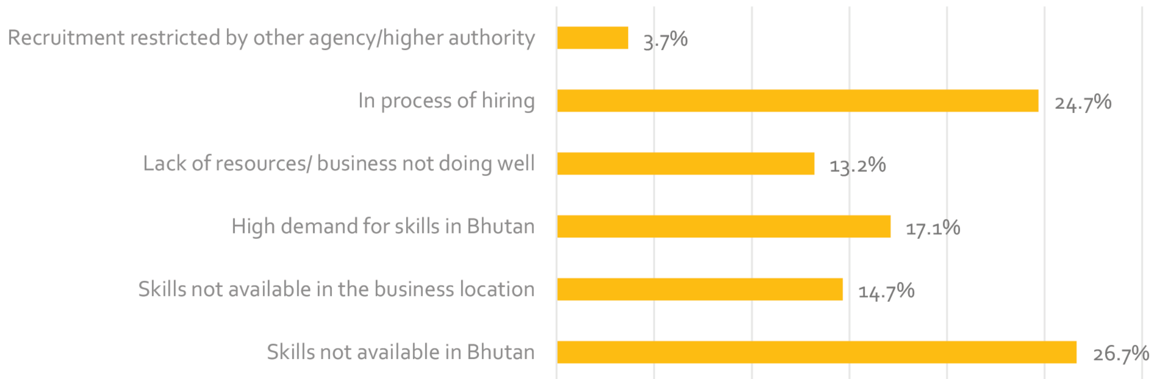
Competencies of graduates	Poor	Satisfactory	Very Good
RUB Colleges	20.3%	54.9%	24.8%
TTI Graduates	20.2%	58.0%	21.8%
Private training graduates	17.7%	58.1%	24.2%

DEMAND OUTLOOK

SKILLS SHORTAGE IMPERATIVE

36.2% of the surveyed industries said that they are currently facing skills shortage, which means that these businesses have vacancies that are not filled. More than half of the industries have specified that the reason they currently have a shortage, is mainly due to skills gap. While some skills are not available in the country, skills are also difficult to source in their business location. Others have said there is high demand for these skills in the country. 13% of the industry said that their business is not doing well to support hiring of additional worker despite the existing human resource gap. 3% said recruitment is restricted by other agency or higher authority, which is especially true for large scale firms or public owned companies, where new recruitments have to be approved by the board. Others said they are in process of hiring people to fill those vacancies.

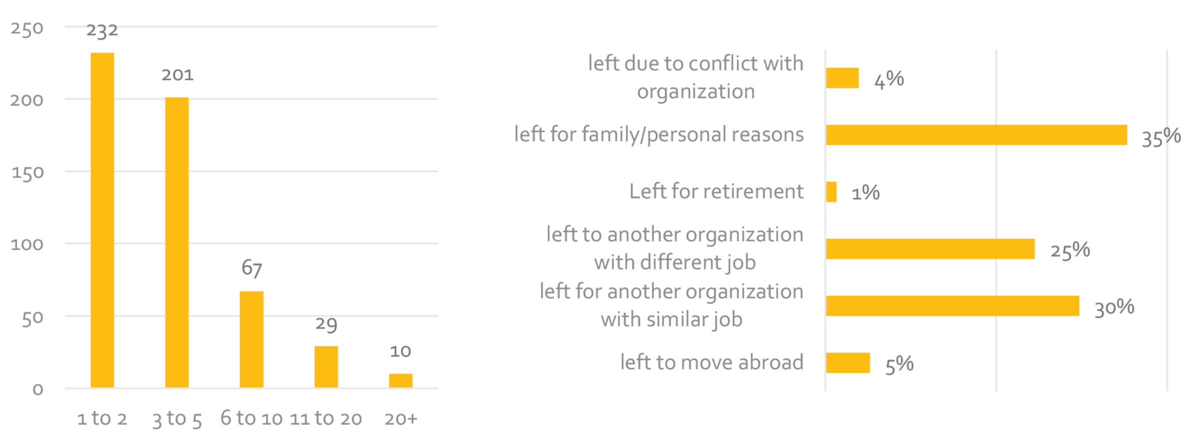
Figure t5: Reasons for businesses operation with skills shortage



Attrition and job hopping is a big challenge in the tourism sector. A total of 539 businesses, which constitute 64% of the industries, have indicated that over 4 workers have left their business on an average in the last three years, which is a very high turnover considering that most of these businesses are small and cottage scale. About 55% have left due to employment opportunities in different organisation, while some have left for similar jobs, others have left for different jobs. A small percentage left due to conflict with the organisation/employer.

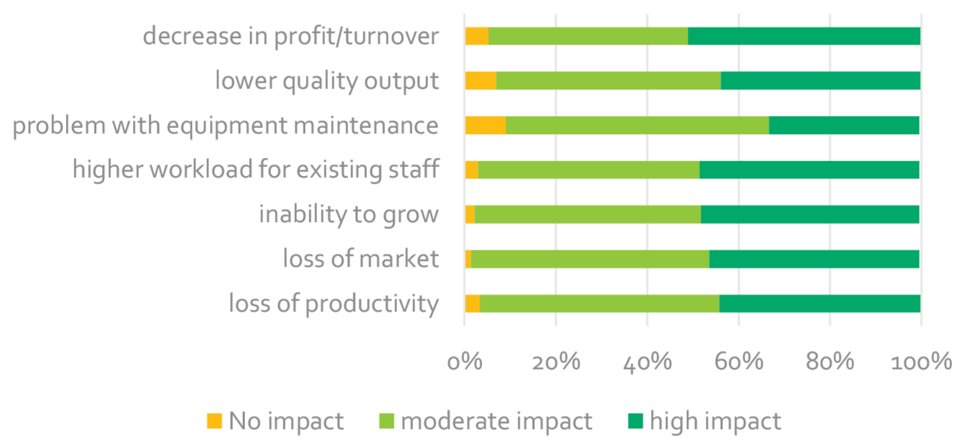
69% of these firms said that they have replaced those who have left. Most indicated that skilled human resources are easily available whereas others indicated that they have succession plan in place. The other 31% indicated that they could not replace those who left since skills are difficult to find or people are not interested to take the position. Few businesses indicated that the job has been reassigned or the responsibility has been given to the existing staff since they cannot afford to fill the gap.

Figure t6: Attrition by number of industries (left) and reasons for attrition (right)



Almost all industries have indicated that skills shortage has direct impact on different areas of their businesses, which includes loss of market and productivity, issue with maintenance of equipment and decrease in business income. More than 50% indicated that it has severe impact on their income.

Figure t7: Impact of skills shortage



The industry also sources foreign workers to meet the existing workforce gap. 62 industries indicated that they have foreign workers. The number ranges from 1 to 5 and only a handful has foreign worker exceeding 5 individuals. Most of the foreign workers are sourced from neighbouring India. Few others have sourced foreign workers from south-east Asia and other regions. Majority indicated that the reason they are currently sourcing foreign workers is due to unavailability of skilled workers in Bhutan and others have said that though there are talents available locally they are not willing to take up the available jobs.

Figure t8: Reasons for sourcing foreign workers

CRITICAL JOBS

While an organisation will have a range of human resource requirement, the focus of the NWFP is to identify only those critical jobs where industries have indicated that they have shortage in and where they are having difficulty sourcing people. Critical skills has been categorised into three groups; hard-to-fill jobs, critical jobs and mission-critical jobs.

Hard-to-fill jobs are those jobs where qualified and skilled workforce are available in the labour market, but for a range of reasons they are not interested to take up the job. These reasons may include location of workplace, working condition, perception of the job, salary, working hours and others. Critical jobs are those where there is a critical shortage locally. There are simply not enough people with the qualification, skills or experience required to take up these jobs. Mission-critical job are those jobs which are required to be filled in order to deliver the core services and product of the business.

The top most hard-to-fill jobs identified by the sector, among others are; food and beverage staff, cook, marketing officer, facility caretaker (which includes gardener, guard, sweeper among others), manager, housekeeper, tour operators, helper, reservation and ticketing officer, and specialised tour guide. The top most critical jobs identified are cook, manager, food and beverage staff, chef, language guide, specialised guide, housekeeper, customer care officer, marketing officer, and reservation and ticketing officer. Lastly the top most mission critical jobs identified are manager, cook, food and beverage staff, chef, housekeeper, customer care officer, ticketing and reservation officer, front desk, helper and guide.

There are overlap of jobs in all these three categories, which is expected. Occupation like cook, food and beverage staff, housekeeper and guide are identified in all these three categories.

Table t5: Hard-to-fill job (top), critical job (middle) and mission-critical job (bottom)

SN	Hard-to-fill Jobs	% of Industry
1	Food and Beverage	39.3%
2	Cook	37.6%
3	Marketing Officer	29.3%
4	Facility care taker	23.3%
5	Manager	21.4%
6	Housekeeper	15.0%
7	Tour Operator	12.1%
8	Helper	10.0%
9	Reservation & ticketing officer	8.6%
10	Specialized guide	8.3%
11	Chef	7.4%
SN	**Critical Jobs**	**% of Industry**
1	Cook	33.1%
2	Manager	24.3%
3	Food and Beverage	18.6%
4	Chef	16.0%
5	Language Guide	11.4%
6	Guide	9.8%
7	Housekeeper	8.6%
8	Customer Care Officer	7.9%
9	Marketing Officer	7.9%
10	Reservation & ticketing officer	7.1%
SN	**Mission Critical Jobs**	**% of Industry**
1	Manager	32.1%
2	Cook	24.3%
3	Food and Beverage	22.9%
4	Chef	9.8%
5	Housekeeper	8.8%
6	Customer Care Officer	8.3%
7	Ticketing and Reservation officer	7.6%
8	Front Desk	6.9%
9	Helper	6.0%
10	Guide	5.5%

CRITICAL JOB DEMAND (2016 – 2022)

177 of the surveyed industry indicated that they have business expansion and diversification plan. 153 provided expansion in other tourism related activities, and 32 indicated diversification into non-tourism related businesses, while a handful of them indicated both expansion as well as diversification plan. This would mean higher employment prospect in the industry within the coming years.

About 39% of them indicated that human resource will be a big contributing factor to their plan to grow and diversify. Most indicated that without the availability of skilled human resources, they will be unable to carry forward their business growth plan. 16% indicated that finance would be another important factor.

In assessing the demand, demand information was collected from 840 industries. The data collected has been extrapolated for 1500 industries in assessing the immediate demand requirement from 2016 to 2018. Further, for assessing the demand requirement in 2019-2022, assumption was made that another 500 new establishments will be added onto the existing industry. Therefore, demand assessment was made for 2000 tourism firms.

With the above assumption, the industry will have job demand for about 3900 within 2016-18 and for about 6500 in 2019-22. The top five occupations with high job prospects are cook, food and beverage staff, specialised guide, housekeeper and manager.

Table t6: Short-term and medium-term critical job demand

SN	JOBS	Short-term requirement (2016-18)	Medium-term requirement (2019-22)
1	Chef	197	295
2	Cook	521	774
3	Food and Beverage	823	1424
4	Front Desk	230	357
5	Specilized guide	532	997
6	House keeper	441	931
7	Spa Therapist	7	26
8	Ticketing and Reservation Officer	100	171
9	Tour operator	4	5
10	Accountant	67	109
11	Customer Care Officer	9	24
12	Driver	96	148
13	Finance officer	18	33
14	Guard	5	17
15	Helper	323	314
16	Human Resources Officer	18	38
17	IT Officer	30	52

18	Manager	402	567
19	Marketing Officer	64	131
20	Procurement and store officer	7	10
21	Technician	38	52
	TOTAL	**3933**	**6475**

CRITICAL CAPABILITIES

SKILLS GAP IMPERATIVE

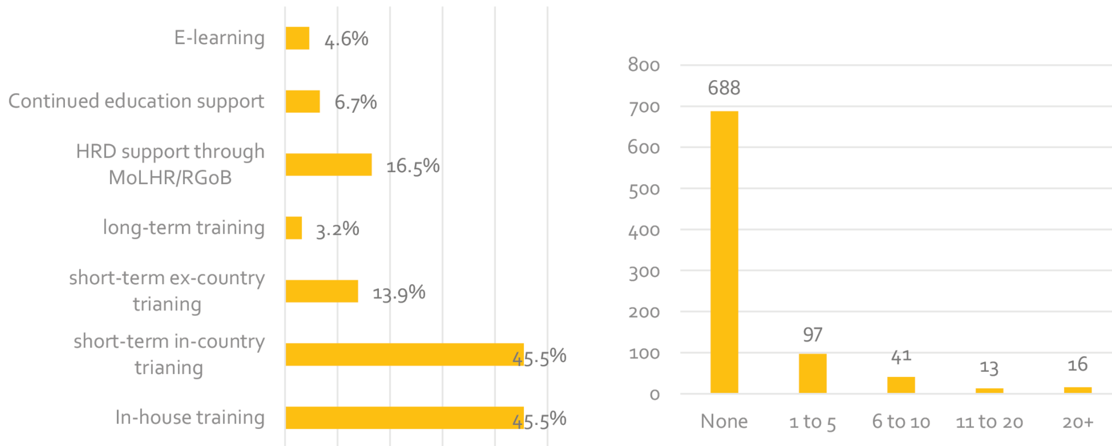
An assessment was made to see the kind of training and development support provided by the industry themselves to its staffs. Industries were asked if they provide support in different training areas as categorised in the following figure. Most indicated that they provided support in terms of short-term in-country and in-house training. These kinds of training require comparatively lower investment. Very few industries provide support for e-learning, continued education and long-term training.

The MoLHR, since its inception, has been providing HRD support to the private sector. HRD Masterplan are drawn in alignment with the government's FYP. In the 11th Five Year Plan, the HRD Masterplan objectives of the tourism and hospitality sector is to substantially enhance the competencies and knowledge of the senior managers and executives to be creative, resourceful and competitive. Secondly the sector will be supported by the supply of service oriented pool of human resources in various occupations. They should be able to create new products, improve the quality of services and provide the visitors to Bhutan a favourable impression of the country and its culture[1]. In order to meet this objective, the MoLHR has been providing both in-service training support and pre-service training to the prospective workforce interested to work in this sector. Only 16.5% of the tourism industry said that they have supported their employees to avail HRD support of the MoLHR.

The employers were also asked on the number of worker trained in 2014. 688 industries have indicated that none of their worker have undergone any training or development program in 2014. 97 firms have trained about 1 to 5 workers and few industries have trained more than 6 workers in 2014. These are mostly large scale industries.

[5]Abstracted from 11th FYP HRD Masterplan for the Economic Sector (2013-18)

Figure t9: Training support by industry (left) and employees trained in 2014 (right)



While about 150 industries have trained their workers in 2014, only 24 industries have spent financial resources on training and development of their staff in 2014. 11 industries have spent within the range of Nu 10,000 to Nu 100,000; seven have spent more than Nu 100,000 and others have spent less than Nu. 10,000. None of the firms have budget kept aside for training and development of their staff. Therefore, most of the training and development program were funded by an external agency or they were conducted in-house with minimal or no cost.

Only 228 industries said that they give job orientation to new recruit. The orientation program range from 1 to 7 days (117 industries), 8 to 30 days (70 industries) and more than a month for others. The orientation is mostly on the service rules and regulation, working terms and condition and familiarisation on the job. Half of those who did not provide orientation said that new recruits were able to perform their job without any orientation. Others said that they do not have system of orienting new recruits.

While not many employers have supported their workers for training and development programs, most see the value and impact of training. As highlighted in the following table, most industries have said that trainings have boosted the confidence and productivity of their workers. Many of them felt that it has also brought moderate to significant improvement in the organisation's performance and productivity.

Table t7: Impact of training by number of industries

Impact of Training	No Difference	Slight improvement	Moderate improvement	Significant improvement
Confidence	10	53	399	219
Work Productivity	11	54	375	240
Organizational productivity	10	46	340	180

TRAINING AND DEVELOPMENT REQUIREMENT

Employers were asked to list out a total of five training requirements for their existing workers. They have identified skills gap in cuisine and cooking, food and beverage services, communication and customer care, human resource management and soft-skills training. Guide training includes specialised training for guide in iconography, bird watching, eco and cultural guide. Soft-skills training included training in work ethics, attitude and loyalty. Facility maintenance skills included trainings in plumbing and safety among others.

Table t8: Skills gap in the tourism sector

1	Cuisine and cooking training
2	Food and beverage services
3	Food hygiene and sanitation
4	Front desk
5	Guide training
6	Hospitality and hotel management
7	Housekeeping services
8	Specialised language training
9	Ticketing and reservation training
10	Accounting training
11	Communication & customer care
12	Facility and equipment maintenance skills
13	Finance training
14	First aid training
15	Human resource management
16	IT skills training
17	Management & leadership
18	Marketing skills
19	Soft-skills training

CONSTRUCTION SECTOR

CONSTRUCTION SECTOR

INDUSTRY OUTLOOK

SECTOR PROFILE

Construction sector is one of the fastest growing industries in the country and contributes 15.46% to the GDP (NSB 2015). Currently there are a total of about 3800 construction firms registered with the Construction Development Board (CDB). Registration with CDB is mandatory for issuance or renewal of business license for any construction related industry in the country. 139 construction companies are registered under the Company Act of Kingdom of Bhutan 2000. This constitutes 39.6% of the overall companies registered under the Act. Majority of licensed establishment in the country are in the construction sector. The development in the hydro power and boom in the private-housing and government construction projects has been the main catalyst for growth in this sector. The sector also plays key roles in construction and maintenance of infrastructures like roads, bridges, irrigation channels, schools, hospitals, offices among others.

Construction will continue to be an important sector for another few decades with huge drive from both government and private construction activities. The Bhutan Transport 2040: Integrated Strategic Vision has been drawn up and it envisages upgrading of road network and highways including the enlargement of existing roads to four road lanes, tunnels and viaducts. This will require more sophisticated engineering skills than it is available, in the country, today. The total budget allocated for the road sector during the 11th Five year plan is 22 billion, double the amount of 10 billion in the 10th FYP. Further, there are plans to build 9 additional hydropower plants (Amochhu, Bunakha, Wangchhu, Sunkosh, Dorjilung, Chamkharchhu, Kuri-gongri, Nyera Amari I & II) in addition to 5 currently under construction (Punatsangchhu I &II, Mangdechhu, Kholongchhu, THye). Therefore, the construction industry will continue to grow in terms of business as well as employment opportunities.

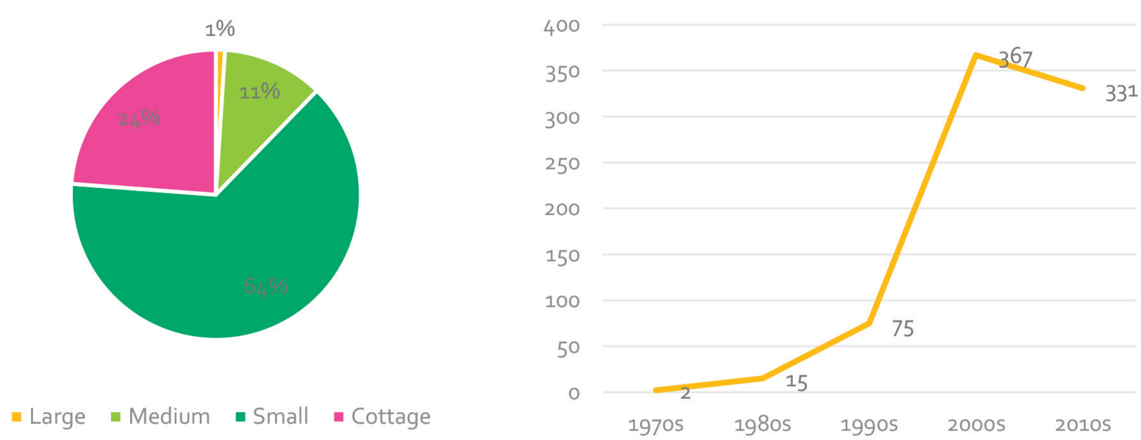
A total of about 1500 construction firms were trained prior to their participation in the employer survey. The training provided managers and proprietors of the construction firms with training in assessing their workforce gap and providing them with good understanding on the various human resource terminology and its use. The training was conducted so that the employers would be in position to provide accurate information on their skills shortage and skills gap. A total of 790 construction establishments participated in the employer survey of more than three thousand construction firms registered with CDB.

Most of the construction businesses are briefcase contractors without any formal set up and are contract dependent. As per the current system of licensing, any promoter can easily avail contract business license even if it means that the firm does not have the necessary human resource or experience in construction work. In fact, having an in-house engineer is not mandatory to get registered as a construction firm. Even for large contractors, one engineer with a degree and another with a diploma is sufficient for the registration. For smaller contractors, the regulation does not even require engineers. Engineering decisions of the works are mostly undertaken by the proprietors of the construction firms, many of whom lack engineering skills or training. It has been often mentioned that for a small country like Bhutan there are far too many contractors.

The survey indicates that one percent of the surveyed industry are large scale, meaning they employs more than 100 people; 11% are medium scale employing between 20 to 99; 64% are small scale employing between five to 19 and 24% cottage employing one to four. Similar to tourism sector, most of the industries in construction sector are small and cottage scale.

Over the years, there has been growth in the number of establishments in the construction sector. From the surveyed industries, two establishments were licensed and operational in 1970s, 15 in 1980s, 75 in 1990s, 367 in 2000s and 331 in 2010s. This also gives a good understanding on the growing establishment trend in the construction industry. The decline in the 2010s can be attributed to the rupee crisis which affected the construction industry the most.

Figure c1: Construction industry by scale of business (left) and year of establishment (right)



Unlike the tourism industry which is mostly Thimphu-centric, construction sector has a good regional spread. While majority of the construction establishments are operational in the Mongar followed by Thimphu region, there are good number of establishment in Gelephu, Samdrupjongkhar, Trongsa and Phuntsholing region. 78 businesses have indicated that they have their businesses located in more than one district.

Most construction firms are engaged in multiple services. 83.9% of the industry said they are engaged in building repair and maintenance. 79.1% are engaged in building construction, 35.2% in road construction, 27.5% in bridge construction and 7% in hydro-power construction. The industry also indicated that 54.4% of their current assignment or work is funded through government-projects, whereas 22.2% said they are engaged only in privately-funded construction and 23.4%

indicated that they are engaged in both private and government-based contracts. This gives a clear indication that most of the government construction are sourced out to the private construction firms and that most private construction companies rely on government funded projects.

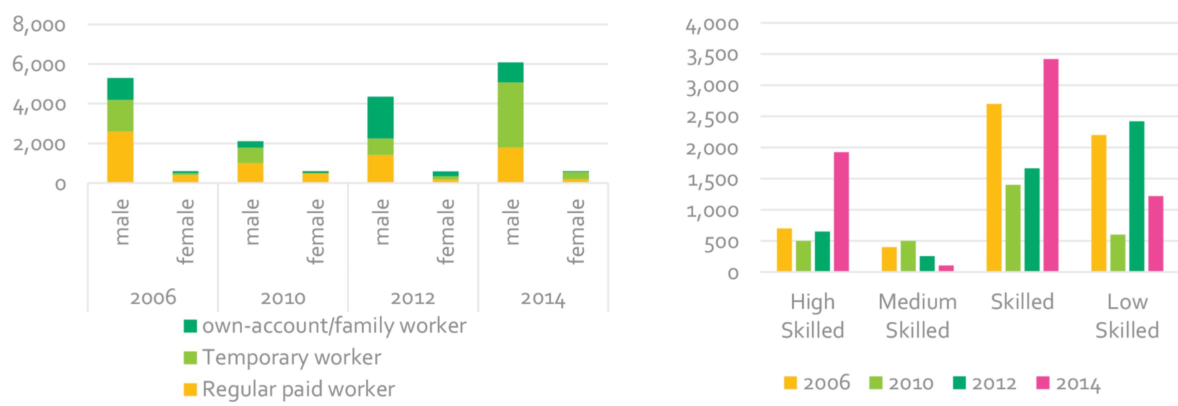
Figure c2: Construction industry by regional location (left) and area of business engagement (right)

Construction sector has the lowest engagement of female workforce. The figure has not improved over the years. The LFS 2014 indicates that only 8.9% of the national workforce in the sector is female. While the sector employs the least workforce, it imports the highest number of foreign workers. About 88% of the foreign workers are engaged in the hydro and non-hydro construction activities throughout the year. It can be said that this sector has the largest workforce gap compared to others. Some of the factors that contribute to this are; Bhutanese people do not want to take up low skill and labour intensive jobs; supply of skilled workers required in this sector are not available in Bhutan; and the issue is further compounded by the easily available foreign workers willing to work at lower wage and harsher conditions as preferred by employers.

The sector has a large share of own-account or family workers and temporary workers. Regular paid workers constitute only 29.7% of the total workforce. This is understandable since more construction firms are engaged in contract-based works which are time bound and requires human resources only as and when the contract activities are being delivered. Most construction firms are mobile and move with business opportunities being available in different regions.

The number of construction establishment against the employment generation for the national workforce is one of the lowest. The sector currently employs about 6600 workforce (LFS 2014) and about 35000 foreign workers (DoL 2015). The profile of skilled workforce in this sector has slightly improved over the years. As indicated by the following figure, there has been good increased in the number of high skilled and medium skilled workforce in the sector, which can be attributed to government's investment in engineering college, polytechnic, construction TTIs, and scholarship in construction trades over the years.

Figure c3: Workforce profile by nature of work engagement (left) and skill level (right)



RECRUITMENT PRACTICES

Information and understanding on the recruitment practices can help assist prospective job seekers, training and education providers and government alike to design necessary intervention required to assist an individual become job ready. Recruitment criteria have been broadly categorised into four: work experience requirement, skills and competencies requirement, personal characteristics, and qualification requirements. Similar to the tourism sector, majority of construction industries have identified work experience as one of the main requirements while sourcing a new recruit. Industry's preference for someone with experience can explain the industry's disinterest and unwillingness to train new recruits for the job. Since construction works are time-bound, the industry cannot afford to invest time in training. Requisite for experience is closely followed by skills and competency requirement.

Work attitude has been attributed as the most important factor for sourcing new talent. Loyalty and commitment has been highlighted as an important factor while the sector themselves generate very few regular-paid jobs. Job security in the sector is a big challenge and thus attracting an individual with commitment to work longer-term is a challenge. Many establishments in the sector are frequently licensed and de-licensed since the business is heavily dependent on projects and works which are not regular in nature. Government contracts are competitive and are awarded only on award of bid.

67% of the industries indicated that physical strength is important factor for sourcing a new recruit which explains high employment of men against women, since the general gender perception among many is that men are physically stronger than women and can endure hasher working conditions. Under skills and competencies, communication skills, and customers relations has been identified important over other factors.

The sector is heavily dependent on the supply generated by the College of Science & Technology (CST), Jigme Namgyel Polytechnic (JNP) and the TTIs. The TTIs churn out little less than 400 vocational graduates annually for the construction sector that requires over 30,000 workers. The industry have indicated their preference for vocational or technical graduates over other kinds of qualifications.

Figure c4: Ranking of different recruitment category

Table c1: Level of importance on different recruitment criteria in construction sector

	not important	moderately important	very important
Personal Characteristics			
Attitude	0.0%	13.5%	85.9%
Personal appearance	21.9%	43.8%	33.6%
Physical strength	3.3%	28.6%	67.3%
Loyalty & commitment	0.0%	12.0%	87.5%
Skills & Competencies			
Communication	1.9%	26.7%	70.9%
Writing	4.8%	42.7%	52.0%
Problem solving	3.5%	33.2%	61.9%
Analytical thinking	3.2%	30.0%	66.2%
Customer relations	3.3%	15.8%	80.3%
Creativity	2.7%	23.8%	72.8%
Qualification			
High school	8.4%	41.1%	49.9%
vocational/technical	7.5%	23.0%	68.9%
Degree	14.8%	34.4%	50.1%
Masters'	24.1%	37.0%	38.4%
Work Experience			
in same field	3.2%	13.4%	82.8%
in different field	8.9%	36.2%	54.3%
general experience	4.9%	35.9%	58.5%

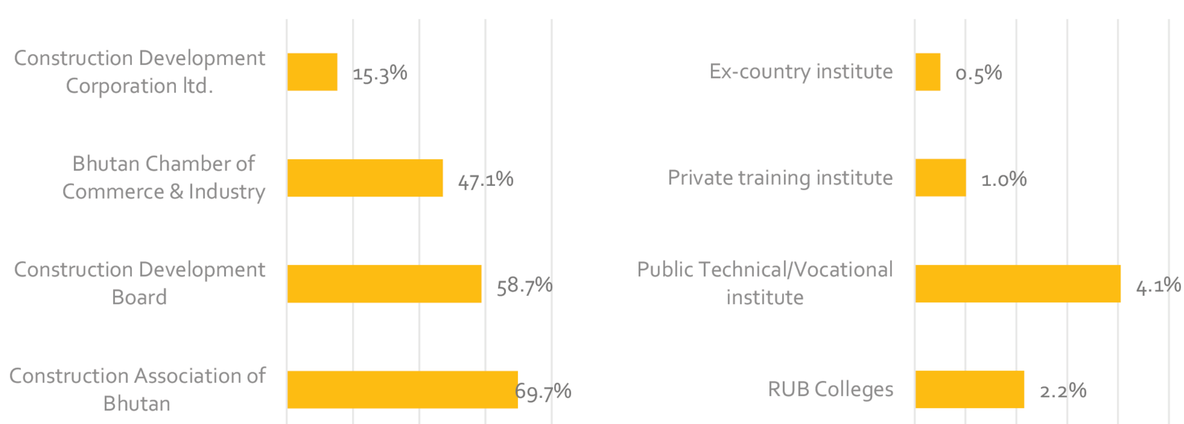
LINKAGES AND ASSOCIATION

The construction sector has strong and multiple sector bodies, some of which are the Construction Association of Bhutan (CAB), the Construction Development Board (CBD), the Construction Development Corporation Ltd. (CDCL), and BCCI which represent the larger private sector. The CDB is the overseer of construction industry in Bhutan. It is mandated to promote development within the industry and to ensure efficient and quality construction. All construction industry are mandated to register with the CDB as per the licensing norm. The CAB is a mutually benefit organization registered under the CSO Act. CAB acts as an information channel, a mediator and a bridge between the industry it represent and the various other agencies.

Similar to the tourism sector, the industry has good linkages and affiliations with their sector body while their linkages with training and tertiary institution is quite negligible. About 759 establishments, which constitute 96% of the industry, said that they were associated with one of the industry bodies. 70% of the industry said that they are formally associated with CAB and 58% with CDB. Both these agencies cater to all kinds of businesses in the construction industry. Other are associated with BCCI and CDCL. Most of the industries said that they get information and support on new tender, licensing process and training from the industry body.

The industry's direct association with the training or education provider is negligible. The practice has been that most industries associate with the training or education providers through the sector association or body. These sector body acts as the bridge between the training providers and the industries.

Figure c5: Association with industry body (left) and linkage with HRD institutions (right)



An assessment was made to see the level of training support provided by the industry association for the industry. A large number of them indicated no support for either long-term or short-term training. Human resource or workforce issues within the industry are also not a priority agenda with many industry body. The support for short-term training are mostly related to awareness and familiarisation on the rules and regulation in the industry.

Table c2: Level of support by industry body on training and sector HR

level of support	short-term trianing	long-term training	HR issues
No support at all	346	509	341
Little support	232	90	217
Moderate support	33	19	56
Frequent support	15	7	11

The surveyed industries were ask to rate the technical and tertiary education graduates on their level of competency and performance in the construction industry. A good percentage of them indicated that they are highly satisfied with the competency of graduates coming out of the training institutes and RUB colleges. The industry also indicated high level of satisfaction with the private training providers. While there are no construction specific private providers, some of the generic training such as site supervisory, construction management, accountancy and management are being churned out by these providers.

Table c3: Industry's level of satisfaction with TVET/tertiary graduates

Competencies of graduates	Poor	Satisfactory	Very Good
RUB Colleges	16.1%	56.6%	27.3%
TTI Graduates	9.0%	49.5%	41.5%
Private training graduates	15.2%	52.6%	32.1%

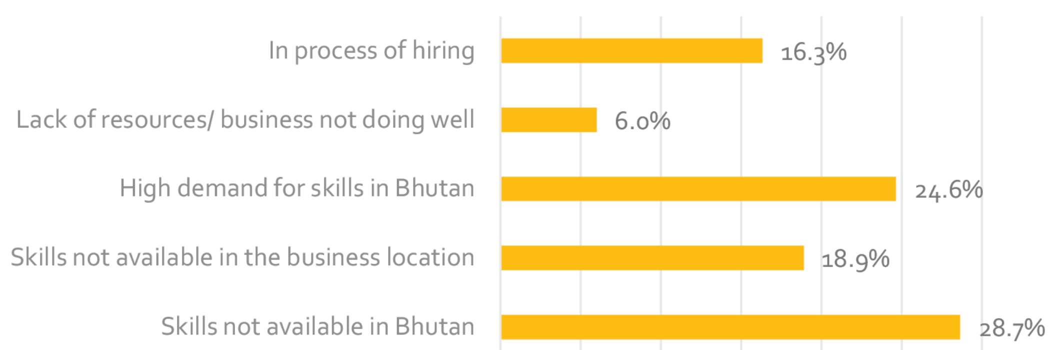
DEMAND OUTLOOK

SKILLS SHORTAGE IMPERATIVE

Some of the key issues highlighted most frequently in almost all discussion and findings is the low level of productivity due to lack of specialisation and use of old technology ultimately resulting in high cost and low quality construction. Other issues are related to low focus and attention on the human resource development within the industry. Some of the human resource issues highlighted in the 11th FYP HRD Masterplan document are that the sector lacks professional development in the engineering field. Anyone graduating with a diploma or degree is seen as qualified to undertake the multitude of engineering related tasks from preparation of bid documents to design and supervision work. Further, there are no incentives for the industry to invest in the specialised skills of their staff. Though there are plans and policies to foster mechanisation and green construction, very little effort is made on the building experts in these new areas.

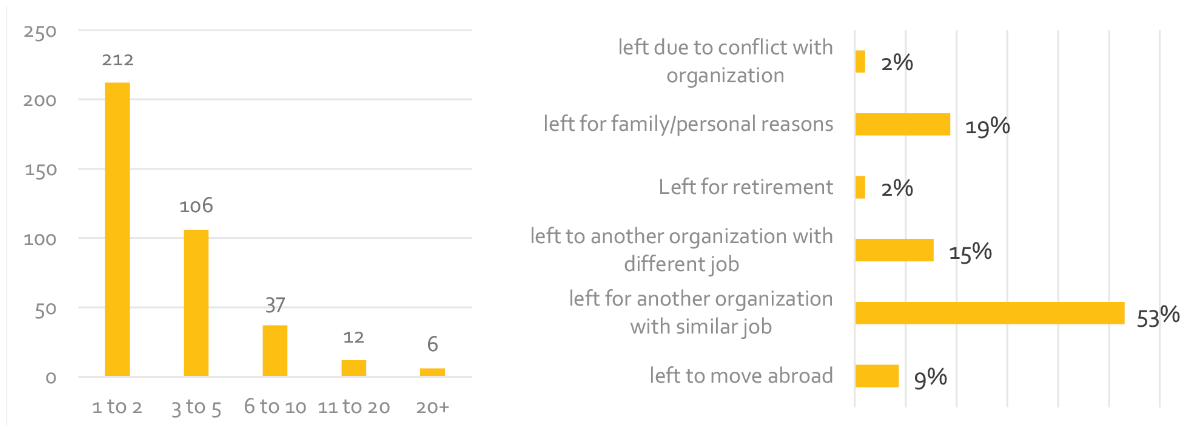
Majority indicated that skills required by the industry are not available in the country or in the region where their business is located. Others said that there is high demand for the skills within the country. About 16% said they are in process of hiring new recruits. Very few said that they are not able hire due to resource constrains.

Figure c6: Reasons for skills shortage



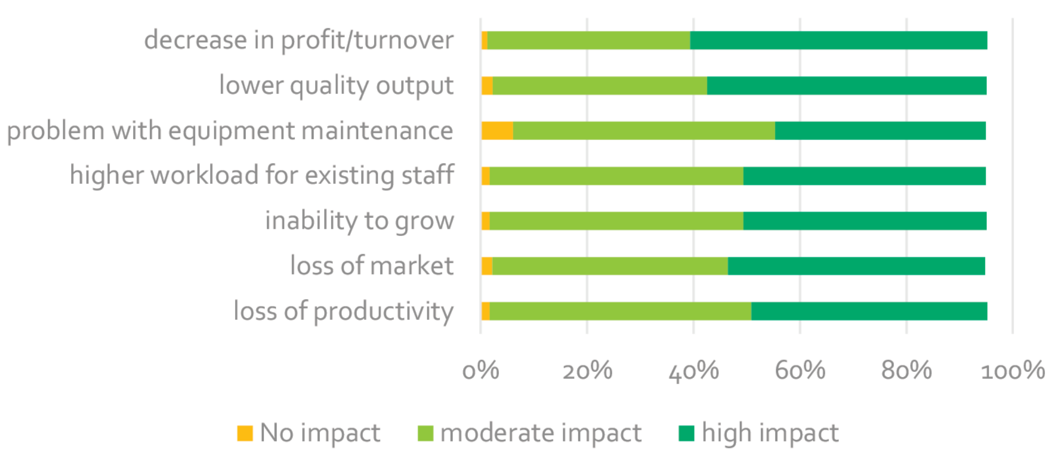
Despite the time-bound nature of work, the industry has high attrition rate. 212 industries have indicated that about one to two workers on an average have left over the last three years and 106 indicated that three to five workers on an average left. Most workers have left for similar jobs in a different organisation.

Figure c7: Attrition by number of industries (left) and reasons for attrition (right)



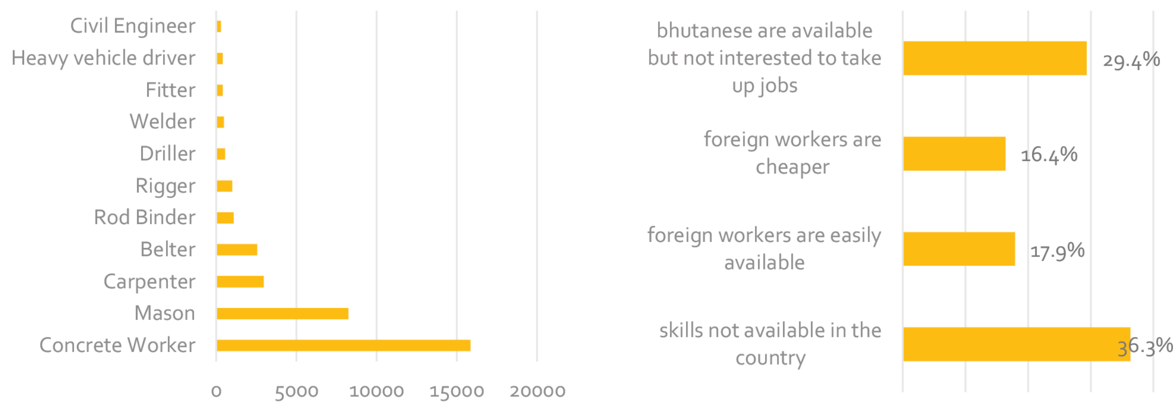
The impact of skills shortage has direct impact on the performance and productivity of any businesses and most construction industry acknowledges this. Not having people to undertake the job affects the quality of construction works and the income of business as highlighted by most construction industries. Industries acknowledging the fact that human resource is an important component in their business development and growth can help better realise any skills development plans with requires input from and partnership with the industry.

Figure c8: Impact of skills shortage



Construction sector imports the highest number of foreign workers. They are mostly skilled and high skilled workers. Some of the highest trades of import are mason, carpenter, construction machine operators, welder, driver and engineer, which is required in large number against the existing supply. Most industries said that the main reason for sourcing foreign workers is because skills are not available in the country. 29% said that although Bhutanese are available in the labour market, they are not interested to take up construction related jobs. Others said foreign workers, who are comparatively cheaper and effective in their job delivery, are easily accessible from the neighbouring region.

Figure c9: Major occupation of import (left) and reasons for sourcing foreign workers (right)



CRITICAL JOBS

The industries have identified numerous critical jobs, which has been categorised into broader occupational category; Site supervisor including site manager and foreman; construction machine operator including earth moving operators, hoist operators, forklift operator, crane operator, backhoe operator, payload operator and boomer operator among many others; mason including tile layer, concrete/stone/cement workers, and rigger.

Table c4: Hard-to-fill job, critical job and mission-critical job

SN	Hard-to-fill Jobs	% of Industries
1	Electrician	57.0%
2	Manual labourer	52.0%
3	Plumber	50.6%
4	Mason	36.1%
5	Construction machine Operator	25.4%
6	Site Supervisor	25.2%
7	Construction carpenter	17.8%
8	Civil Engineer	13.7%
9	Heavy vehicle driver	9.5%
10	Welder	6.1%

SN	Critical Jobs	% of Industries
1	Mason	63.9%
2	Carpenter	63.3%
3	Welder	62.0%
4	Manual worker	57.0%
5	Construction machine operators	41.8%
6	Solid waste plumber	28.1%
7	Civil Engineer	25.4%
8	Site Supervisor	25.4%
9	Construction managers	19.0%
10	Electrician	12.8%
11	Traditional structure/house builders/experts	12.8%

SN	Mission-critical Jobs	% of Industries
1	Mason	63.3%
2	Construction manager	54.6%
3	Site Supervisor	53.2%
4	Plumber	50.8%
5	Manual worker	38.1%
6	Carpenter	26.5%
7	Electrician	25.6%
8	Civil Engineer	13.8%
9	Welder	12.8%
10	Construction machine operators	12.5%
11	Traditional structure/house builders/experts	12.4%

CRITICAL JOB DEMAND (2016 – 2022)

148 of the surveyed industry indicated that they have business expansion and diversification plan. 128 wanted expansion in other construction related activities and 44 indicated diversification into non-construction related businesses and 24 wanted to expand as well as diversify. This would translate to higher employment opportunities in the coming years. Majority of them indicated that human resource will be a big contributing factor for their plans to grow and diversify and 15.4% indicated that finance would be an important factor.

The construction sector has huge potential for employment. With proper intervention, the sector can engage about 30,000 people in 2016-18. For assessing the medium term growth an assumption of modest 2% growth was taken into consideration. If mechanisation policy is to take shape in 2019-22, the sector will create high end jobs for about 17000 individuals and about 33,000 jobs if otherwise.

Table c5: Short-term and medium-term critical job demand

SN	JOBS	short-term requirement (16-18)	long-term requirement (19-22) *scenario 1*	long-term requirement (19-22) *scenario 2*
1	Account/Finance officer	24	26	26
2	Assembly worker	35	39	39
3	Belter	2550	2805	1403
4	Building Painter	25	28	28
5	Carpenter	2953	3248	1624
6	Civil Engineer	300	330	330
7	Construction machine operators	650	715	715
8	Construction Supervisor	62	68	68
9	Electrical Engineer	36	40	40
10	Electrician	73	80	80
11	Electronic Mechanic	11	12	12
12	Fabricator	38	42	42
13	Fiber machine operator	20	22	22
14	Fitter	398	438	438
15	Gas Welder	11	12	12
16	General Manager	12	13	13
17	Geologist	18	20	20
18	Heavy vehicle driver	398	438	438
19	Manager	32	35	35
20	Manual labour	821	903	301
21	Mason/Concrete workers	18254	20079	10040
22	Mechanical Engineer	30	33	33
23	Metal Molder	38	42	42
24	Motor Winder	27	30	30
25	Nozzle man	12	13	13
26	painter	32	35	35
27	Plumber	73	80	80
28	Rigger	1004	1104	368
29	Rod Binder	1089	1198	399
30	Sheet metal worker	136	150	150
31	Site supervisor	531	584	584
32	Structural metal worker	253	278	139
33	Surveyor	27	30	30
34	Tile layer	10	11	11
35	Turner	51	56	56
36	Welder	487	536	268
	TOTAL	**30521**	**33573**	**17963**

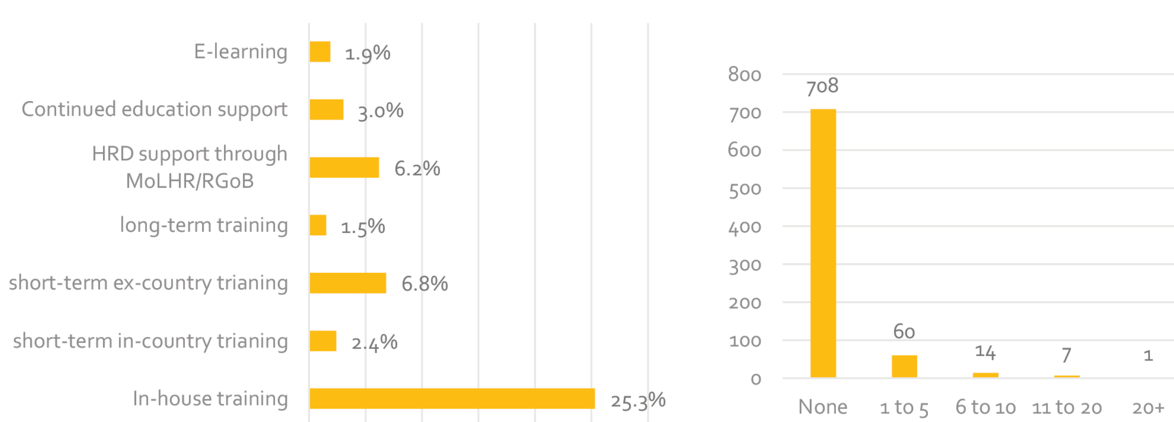
CRITICAL CAPABILITIES

SKILLS GAP IMPERATIVE

The 11 FYP HRD Masterplan of the MoLHR has identified construction as one of the economic sectors where HRD intervention is required. The HRD Masterplan is the only HRD implementation plan for the sector. The objective of the plan is to improve the quality of construction industry though enhanced management and to establish pool of experts in construction trades where Bhutan is weakest at present. Focused HRD interventions targeted to enhance the capacity of the managers (often the proprietors), site engineers, supervisors, and technicians in the construction industry in contracts management, construction project management, labour management, building services and facilities management, quality, safety, and productivity in construction projects, construction estimation and cost management, occupational health and safety hazards, construction material testing and calibration, procurement & stores management, and maintenance of equipment. Similarly, long term training support in structural engineering & design, construction Management, green construction, tunnelling engineering and environment management will be provided.

The industry on its own provides very little training support for their employees. 708 firms have provided no training for their staff in 2014. 60 industries trained about 1 to 5 workers. 25% said that they provide in-country training but other forms of training like long-term, e-learning and continued education are almost non-existent. 6% indicated that they have received and supported their staff training through MoLHR. Only 53 establishments said that they have spent financial resources to train their employs in 2014. None of the firms indicated that they have regular budget kept aside for training or human resource development activities.

Figure c10: Training support by industry (left) and employees trained in 2014 (right)



While little to no support was provided in training, the industry did see the value of trained workers. Majority of them have indicated that trainings have had significant improvement on the confidence and productivity of the workers and that in turn has had positive impact on the performance and productivity of their business.

Table c6:Impact of training by number of industries

Impact of Training	No Difference	Slight improvement	Moderate improvement	Significant improvement
Confidence	11	99	317	167
Work Productivity	10	100	233	249
Organizational productivity	10	131	296	152

TRAINING AND DEVELOPMENT REQUIREMENT

The construction sector has identified training and development requirement in construction project management, construction quality and safety, site supervision and management, occupational health and safety, and project management among others. Most of these training needs can be addressed through short-term in-country training. Long-term specialised training in structural/road/tunnel/hydro engineering will need serious consideration, taking into account the development in the hydropower and transportation infrastructures.

Table c7: Skills gap in the construction sector

1	Auto CAD training	18	Occupational health and safety
2	Building services and facility management	19	Procurement and store management
3	Construction estimation and cost management	20	Project management
4	Construction project management	21	Risk management
5	Construction material testing and calibration	22	Effective dispute management/arbitration
6	Construction quality and safety	23	Tunnel engineering
7	Green technology	24	Road engineering
8	Heavy machine maintenance	25	Structure engineering
9	Site supervision and management	26	Environment management plan & bioengineering
10	Building-finish training	27	Hydro-power construction engineering
11	Heating, ventilation and air con (HVAC)	28	specialized plumbing technology
12	Accounts training	29	Electrical engineering
13	Business management training	30	Geotechnical & spot hazard mapping
14	Finance management	31	Standardization in construction
15	Human resource management	32	quality testing of electrical equipment & materials
16	Labour management	33	Environmental impact assessment
17	Marketing	34	Environmental monitoring/auditing

PRODUCTION SECTOR

PRODUCTION SECTOR

INDUSTRY OUTLOOK

SECTOR PROFILE

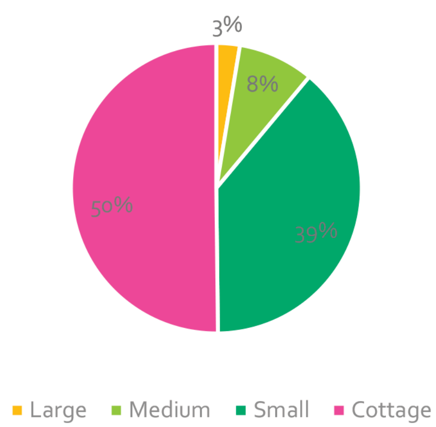
The production sector is gaining momentum in the recent year with the development of new and innovative businesses in agro & food processing, arts & craft, dairy, and other similar areas. The development of new products in the agriculture related activities has contributed to the development of the production industry as the sector directly relies on the goods produced by the primary sector. The EDP 2010 plans development in organic farming, biotechnology including pharmaceutical, nutraceuticals, traditional and herbal medicines, forest-based products, poultry, fisheries, floriculture, health food, animal feed, apiculture, horticulture and dairy. This will have huge implication in the development of new businesses in the sector. Simultaneously, export strategies are being drawn up to promote the 'Brand Bhutan' image. Brand Bhutan will be promoted to support those standard goods and services that ensure clean, culturally sensitive and supportive, organic, community based, and those that contribute to the philosophy of 'Gross National Happiness'.

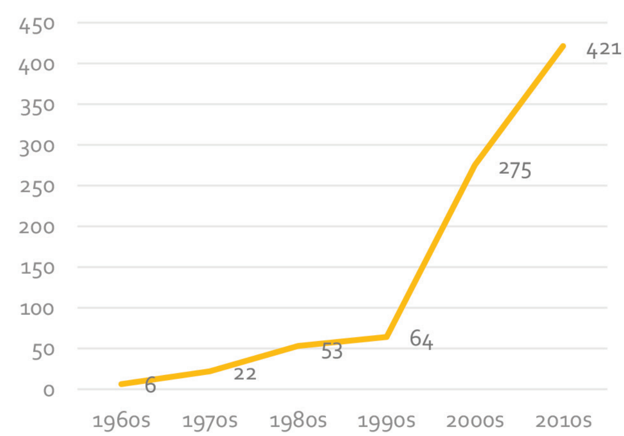
One of the biggest industries in the sector is the hydro-power production industry. A total of five hydro power plants are commissioned (Basochhu, Chhukha, Kurichhu, Tala, Dagachhu). A total of 3 constructions are in advanced stages (Punatsangchu I, II and Mangdechhu) and 2 are at initial stage of construction (Tangsibji and Kholongchhu). There are plan to construct 9 additional hydropower plants at a later stage.

Bhutan currently has 1755 licensed business establishments in the production sector (DoI 2015) and a total of 96 firms registered under the Company Act of the Kingdom. Unlike the earlier two sectors, where the sector businesses are homogenous, this sector has wide range of industries ranging from hydro-based, agro-based, dairy, forest-based and others. 14 different kinds of productions businesses were assessed to understand the industry profile and capture the demand profile. A total of 841 establishment participated in the employer survey.

Unlike the earlier two sectors, there are comparatively greater numbers of large and medium scale industries. These are mainly the manufacturing industries in the south and the hydro-power industries. About 89% of the businesses are small and cottage scale. Majority of these businesses were set up post millennium with majority of businesses being established post 2010. Similar to the earlier two sectors, there is an increasing trend in the establishment of new businesses in this sector. The number of establishments has particularly picked up in the 2010s.

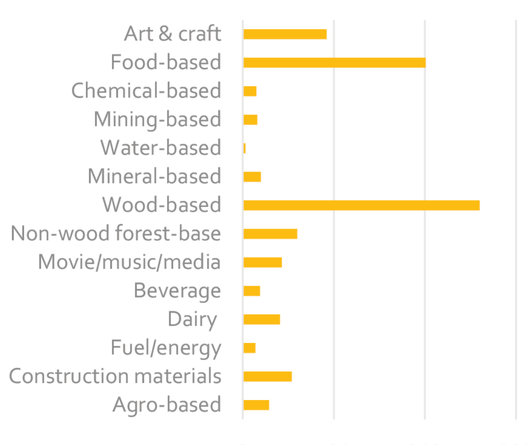
Figure p1: Production industry by scale of business (left) and year of establishment (right)

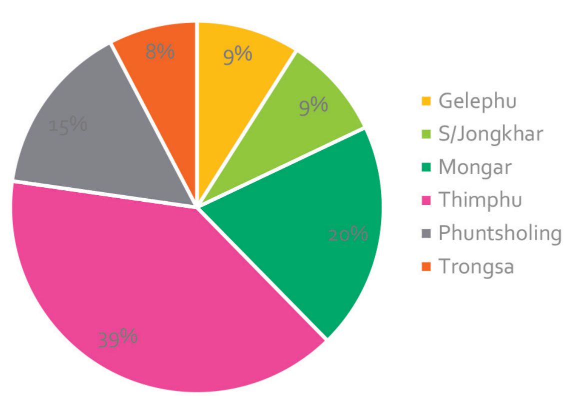




Unlike the tourism industry, the production sector has a good regional spread. While there are maximum numbers of establishments in Thimphu region, there are equally good numbers of establishment in other regions. Majority of businesses are engaged in wood-based, food-based and arts and craft businesses. These are mostly small and cottage scale businesses. 47 businesses are engaged in more than one area of business and 39 businesses are operation from more than one district.

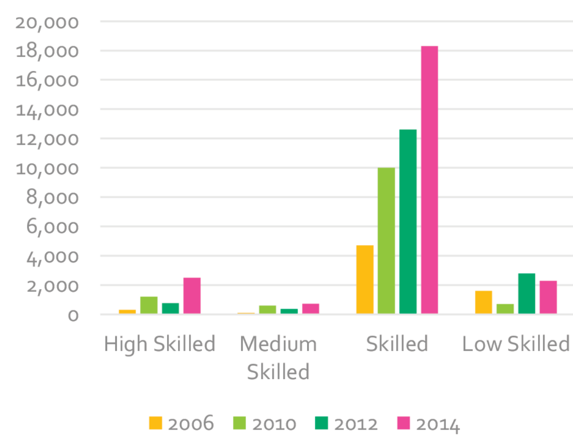
Figure p2: Production industry by area of business engagement (left) and regional location (right)

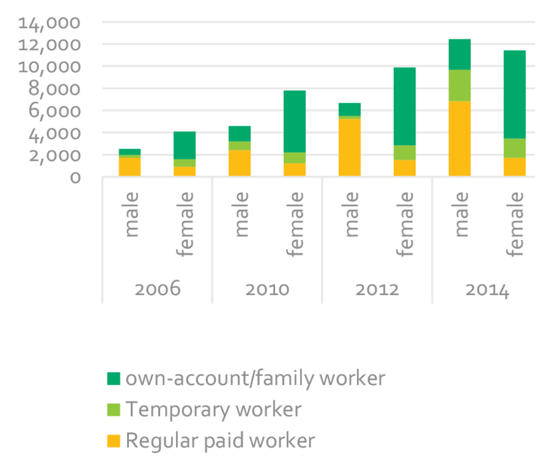




The workforce engagement in the sector has increased over the years. There has been moderate increased in the high skilled workforce and significant increase in the skilled workforce. The number of skilled workforce has increased by three-fold in 2014 as compared to 2006. The sector also employs good proportion of female workforce most of whom are own-account or family workers. There are fairly lesser regular paid workers which haven't improved over the years. This can mean that within the industry, there is preference to employ male worker. Majority of women are engaged as own-account or family worker.

Figure p3: Workforce profile by skills level (left) and nature of work engagement (right)





RECRUITMENT PRACTICES

Just like the two other sectors, prior work experience has been identified as an important factor over others while sourcing new talents followed by personal characteristic and skills and competencies. Attitude, loyalty, communication, customer relation and creativity has been highlighted crucial during the hiring process. In terms of qualification, vocational skills is been considered important over others. There were significant percent of those who said tertiary level education was very important.

Figure p4: Ranking of different recruitment category

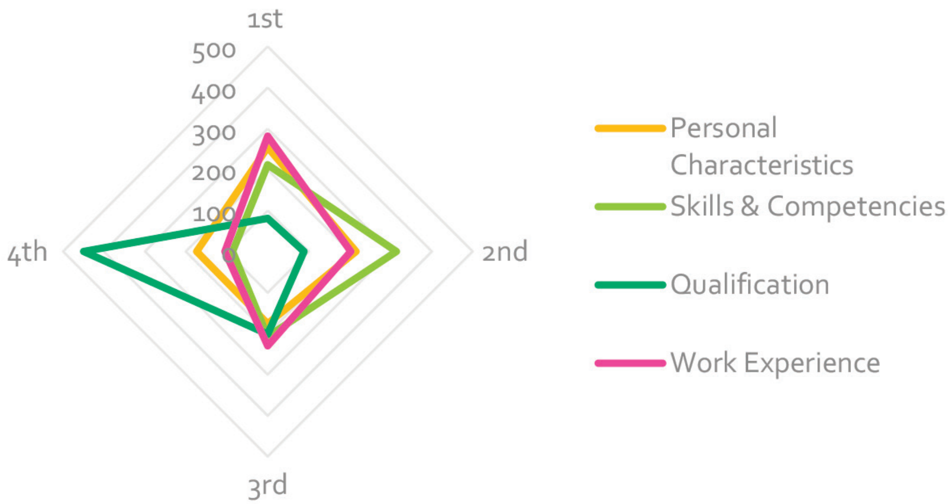


Table p1: Level of importance on different recruitment criteria in construction sector

	not important	moderately important	very important
Personal Characteristics			
Attitude	1.9%	15.3%	81.3%
Personal appearance	31.3%	39.1%	27.7%
Physical strength	6.9%	26.8%	64.9%
Loyalty & commitment	0.7%	9.6%	88.0%
Skills & Competencies			
Communication	3.4%	27.3%	67.8%
Writing	12.6%	41.7%	44.2%
Problem solving	9.3%	36.7%	52.6%
Analytical thinking	8.4%	32.5%	57.7%
Customer relations	3.8%	15.2%	79.5%
Creativity	4.6%	22.2%	71.7%
Qualification			
High school	17.7%	39.1%	41.4%
vocational/technical	17.2%	38.3%	42.9%
Degree	32.1%	38.5%	27.9%
Masters'	44.2%	31.4%	22.8%
Work Experience			
in same field	7.6%	24.3%	66.6%
in different field	14.6%	51.0%	32.8%
general experience	10.7%	38.3%	49.5%

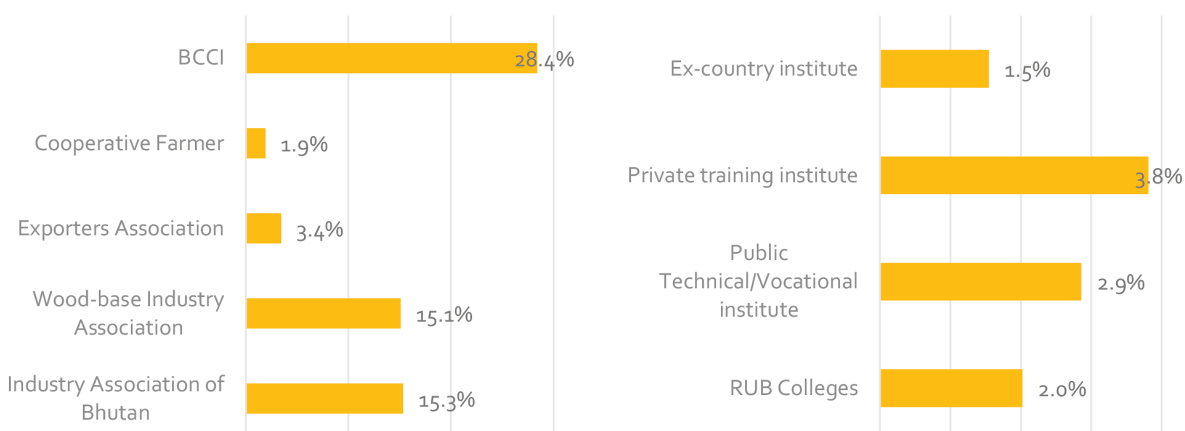
LINKAGES AND ASSOCIATION

Besides BCCI which represent diverse private sector industry, the production sector has numerous industry-specific associations. Some of them are; the Association of Bhutanese Industries (ABI) which represents mostly the manufacturing firms in the south; the wood-based industry association representing various sawmill and furniture houses; the exporters' association catering to those engaged in export business; and the various agro-based cooperatives representing those engaged in agro-based or food-based production.

Similar to the findings from the previous two sectors, the industry's association with the industry body is impressive. At least 62% of the industry indicated that they have linkage with one of the industry bodies mentioned above. On the other hand, it is clear that most industries do not have any direct linkages with the training or education institutions.

Many were not clear on the kind of support they receive from the sector body; few others indicated that they received support in training. Majority felt that it was not relevant for their business to have linkages with training or education institutions. Almost all industries could not identify areas where they could explore linkages.

Figure p5: Association with industry body (left) and linkage with HRD institutions (right)



The industries were asked on the level of support provided by any of the industry body on their training and development needs. The result is similar to the previous two sectors; little to no support is provided in terms of training, both long-term as well as short-term. The industry's workforce and human resource issues are also not an agenda for discussion for most of the sector body. While the industry body are mandated to provide HRD support to the member industries, majority of the industries have not received such support. The lack of fund within the sector bodies and focus on other issues could be one of the reasons. Though most industries are associated with one or more sector body, many were not very clear on the benefit of such associations.

Table p2: Level of support by industry body on training and sector HR

level of support	short-term trianing	long-term training	HR issues
No support at all	429	481	462
Little support	61	42	42
Moderate support	64	26	42
Frequent support	9	11	14

The industries were asked if they were satisfied with the competencies and performance of graduates coming out of the tertiary education and training institutions. More than 80% indicated high level of satisfaction with the quality of graduates from these institutions. While the industry themselves preferred other factors to qualification and skills during recruitment, there is greater degree of satisfaction with employment of those with higher skills and qualification.

Table p3: Industry's level of satisfaction with TVET/tertiary graduates

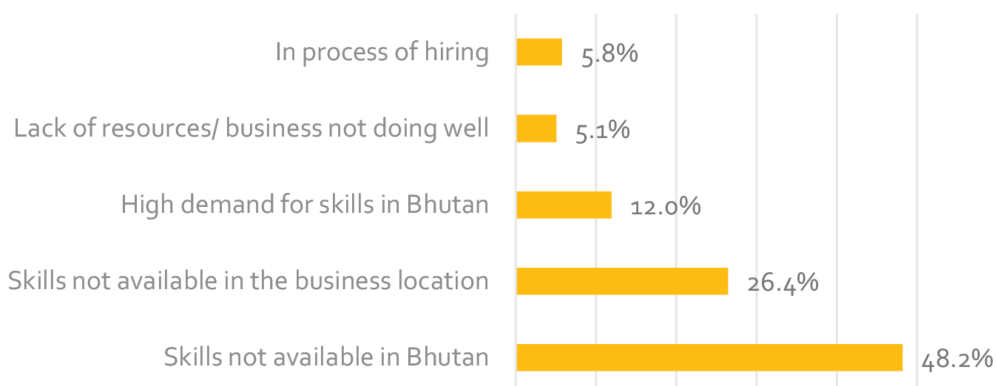
Competencies of graduates	Poor	Satisfactory	Very Good
RUB Colleges	21.6%	40.6%	37.8%
TTI Graduates	10.3%	41.7%	48.0%
Private training graduates	15.4%	50.9%	33.7%

DEMAND OUTLOOK

SKILLS SHORTAGE IMPERATIVE

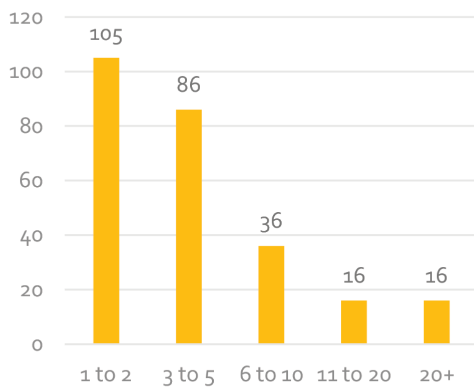
33% of the industries indicated that they are currently facing shortage of workers, meaning that these industries have potential to employ more people within their current situation. 48% indicated that the skills they require for the jobs are not available in Bhutan and 26% indicated that those skills are not available in their business location. 12% indicated that they are not able to get the required people for the job since they face competition from other similar businesses requiring same sets of skills. Majority are willing to source or hire new talents provided that skills are available in the labour market since very few gave an indication of their business not doing well.

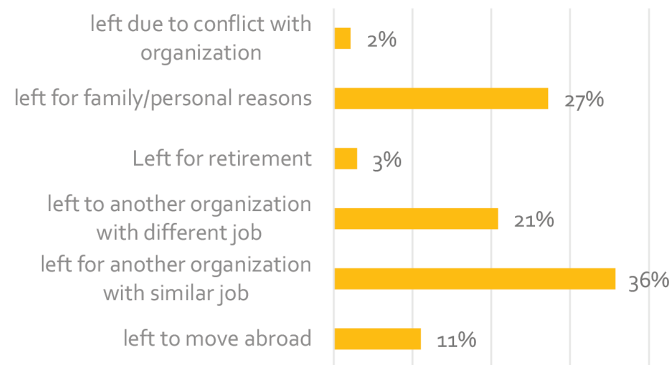
Figure p6: Reasons for skills shortage



Attrition is a huge challenge for the private sector and production industry is no exception. Over the last three years, about 100 industries indicated that, one to two workers have left and 86 indicated that one to five people left their organisation. Considering that almost 90% of the businesses are small and cottage scale, this is a very high turnover. The indication is that 36% left of a different organisation with similar jobs and 27% left due to personal reasons. Therefore, workers attrition and job hopping is a serious concern in this sector.

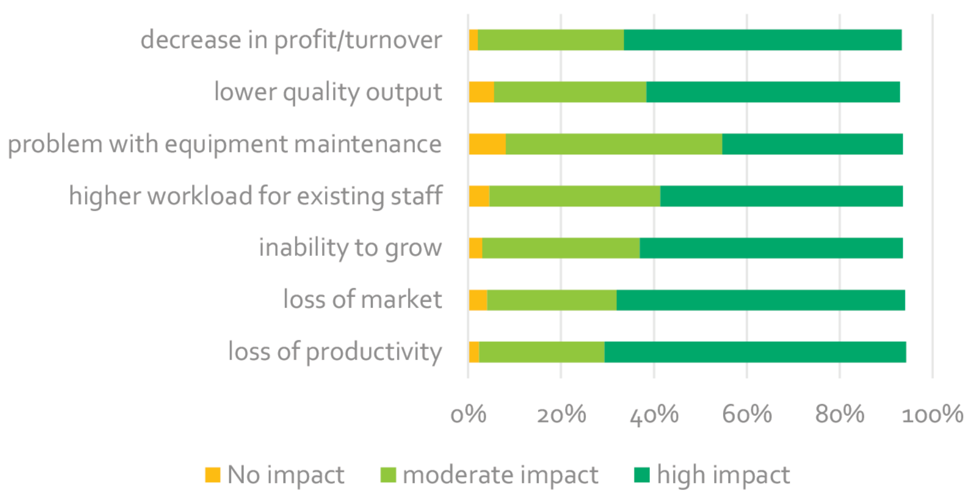
Figure p7: Average turnover in last 3 years by no. of industries (left) and reasons for attrition (right)





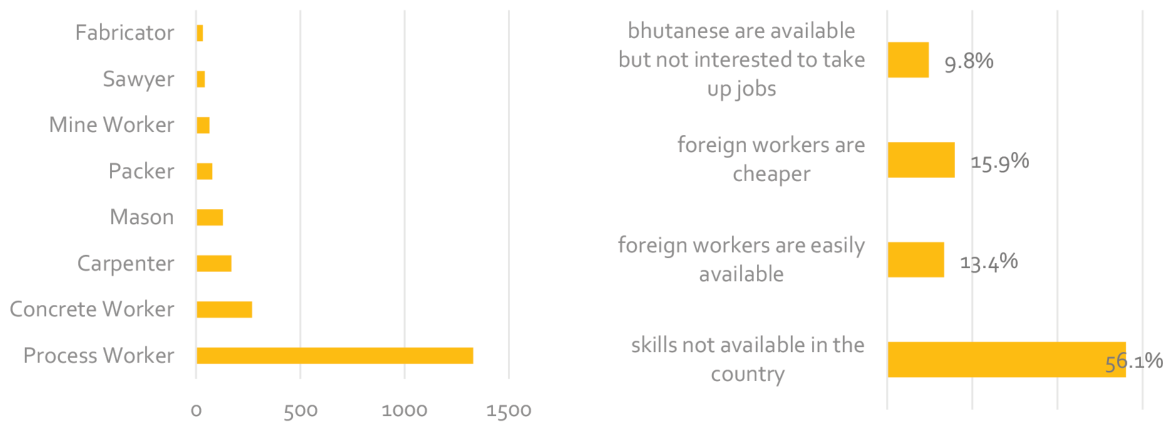
Most production industries are facing serious impact of skills shortage. Many indicated that it is affecting productivity and desire to produce quality product and services. Majority indicated that workers shortage has resulted in lower profit to the business and loss of market to other competitors.

Figure p8: Impact of skills shortage



The production sectors consistently imports about 6 to 7% of the foreign workers. These are mostly process workers working in the large manufacturing firms. Concrete workers, mason, and fabricator are working mostly in the construction material production firms. Sawyer and carpenter are high in demand in the wood-based construction firms. Majority said that they source foreign works since the skills are not available in the country.

Figure p9: Major occupation of import (left) and reasons for sourcing foreign workers (right)



CRITICAL JOBS

Unlike the previous two sectors, there are wide ranges of industries within the production sector. They vary not only in business delivery but also in size of operation. While the wood-based production firms identified carpenter as mission-critical job, the agro-based production firms identified food processor and technologist as their mission-critical jobs. Therefore, only assessment for hard-to-fill jobs and critical jobs were made as indicated in the following table.

Table p4: Hard-to-fill job and critical job

Hard-to fill jobs	Carpenter Farm/livestock caretaker Food processor Manager Manual worker Marketing officer Mechanic and machine operators Mining engineers Product designer

Critical jobs	Chemical engineer Metallurgist Chemist Fabricator Mining engineer Product designer Sawyer Marketing expert Carpenter Plants and machine operators *Zorig* artisan

CRITICAL JOB DEMAND (2016 – 2022)

Compared to the earlier two sectors, the production sector will see comparatively lesser jobs in the short-term and medium-term period. However, it is important to note that these are jobs within the existing establishments. This sector has huge potential for new entrepreneurs and new businesses. Conducive skilling and entrepreneurship programs can foster generation of new jobs in the sector.

Table p5 : Short-term and medium-term critical job demand

SN	JOBS	Short-term requirement (2016-18)	Medium-term requirement (2019-22)
1	Accountant	23	28
2	Baker	69	83
3	Cabinet maker	16	19
4	Cable operator	4	5
5	Caretaker	13	16
6	Carpenter/ wood-worker	207	248
7	Carver	25	30
8	CG expert	6	7
9	Civil engineer	34	41
10	Civil engineer diploma	24	29
11	Clerks	10	12
12	Product designer	34	41
13	Driver	19	23
14	Electrical engineer	114	137
15	Electrical engineer diploma	256	307
16	Fabricators	12	14
17	farm/livestock caretaker	13	16
18	Farm/livestock manager	8	10

19	Finance manager	16	19
20	Food processor	54	65
21	Food Safety officer	4	5
22	Geologist	2	2
23	HR officer	14	17
24	ICT technician	17	20
25	Inspection In charge	7	8
26	Loader	12	14
27	Manager	59	71
28	Manual workers	292	350
29	Marketing officer	116	139
30	Mechanical engineer	205	246
31	Mechanical engineer diploma	50	60
32	Mining Engineer	10	12
33	Packer	101	121
34	Pastry chef	5	6
35	Plant and machine operators	99	119
36	PLC operators	4	5
37	Researcher	2	2
38	Sawyer	45	54
39	Security guard	3	4
40	Store in charge	46	55
41	Tailor	14	17
42	Upholster	8	10
43	Weaver	65	78
44	Zorig Artisan	23	28
	Total	**2160**	**2592**

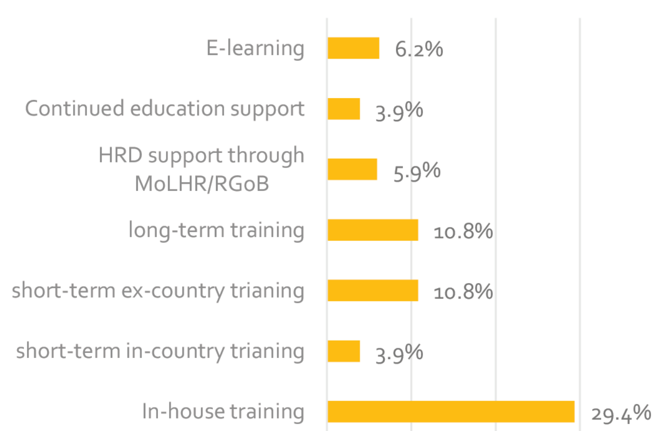
CRITICAL CAPABILITIES

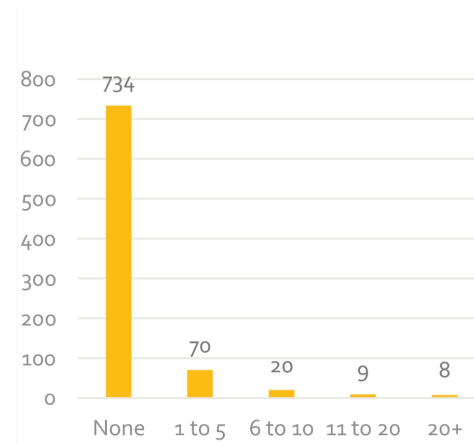
SKILLS GAP IMPERATIVE

Production is one of the economic sectors identified for the 11th FYP HRD Masterplan of the MoLHR. The sub-sectors identified within this broad sector are agriculture, wood-based, mining and arts and craft industry. The issues highlighted in the masterplan are the lack of competent human resource within the industry, the high amount of wastage due to lack of supply chain, and lack of innovation. On the other hand, there is greater diversity among the 841 establishments that participated in the employer survey.

About 29% of the industry provided in-house training, which require lesser resource and 10.8% provide support for ex-country and long-term training. Others forms of training support are negligible. 734 industries, which constitute 87% of the industries, indicated that none of their workers were trained in 2014. 70 industries trained 1-5 workers. Very little money is spent on these training, similar to the earlier two sector, most of the training with the exception of in-house training are funded through an external sources. Majority do no keep training fund for their staff with exception of few large scale industries.

Figure p10: Training support by industry (left) and employees trained in 2014 (right)





While training is not a priority, majority of the industry acknowledged the impact the training has had on the level of confidence and work productivity on their workers. The industry also recognise that this has in turn have had positive impact on their business productivity and performance. A wide range of training and development needs has been identified by the industry for their existing workforce.

Table p6: Impact of training by number of industries

Impact of Training	No Difference	Slight improvement	Moderate improvement	Significant improvement
Confidence	39	123	290	185
Work Productivity	37	118	289	195
Organizational productivity	71	85	291	191

TRAINING AND DEVELOPMENT REQUIREMENT

Table p7: Skills gap in the Production sector

1	Accounts and finance training	16	Livestock handling and care
2	Advance bakery training	17	Machine operation and maintenance training
3	basic book keeping and inventory training	18	Marketing strategy design and implementation
4	Business management training	19	Micro hydropower design and management
5	Disaster management	20	New product design and development
6	e-business strategy	21	Occupational health and safety
7	Export strategy	22	Product finishing
8	Fabric art & development training	23	Product packaging
9	Food Safety and hygiene	24	Renewable energy and distributed generation
10	Geomatics engineering applications	25	Sales and customer relation
11	Human resource management	26	Supply chain management
12	Hydrological analysis and planning	27	Total quality management
13	Hydrological modelling	28	Water resource management
14	Hydropower execution	29	Wood-work training
15	Leadership and management training		

ANNEXURE

ANNEXURE

TOURISM ESTABLISHMENTS THAT PARTICIPATED IN THE EMPLOYER SURVEY

1 Sonam Hotel
2 Udumwara Resort
3 Raven's Nest Resort
4 Zhiwa Ling Hotel Pvt. Ltd.
5 Tiger Nest Resort
6 Norwangs Logde
7 Nemjo Farm House
8 Hotel BI Gatshel
9 Janka Resort
10 Kichu Resort
11 Hotel Phunsum
12 Tashi Lhading Resort
13 Bhutan Nature View Tours & Treks
14 Hotel Dorjeeling
15 Pelri Cottages
16 City Hotel
17 Hotel Olathang
18 Ranjung Resturant
19 Kuzu Resturant
20 Travellers
21 Lhaijabling Resturant
22 Langur Eco Travels
23 Dechen Hill Resort
24 Galingkha Resort
25 Mandala Resort
26 Samdencholing Resort
27 Nirvana Lodge & Home Stay
28 Soechay Restaurant
29 Welcome Hotel-restuarant & Bar
30 Hotel Airport Food & Lodge
31 Dawa Restaurant
32 Spirit of Bhutan Tours & Trek
33 Phuensum Gakhil Hotel
34 Explorers Cafe & Pizza
35 Fly to Bhutan
36 Hotel Tandin
37 Hotel Tashi Phuntshok
38 Laya Tours & Treks
39 Hotel Silver Dine
40 Gakey Pelri Restaurant
41 Yegyel Cafe
42 Bhutan Haven Agency
43 Charo Restaurant
44 T.S.N Restaurant
45 Hotel KK
46 Hotel Jigmeling
47 Hotel Tashiling
48 Hotel Paro
49 Hotel Dragon
50 Roogya Restaurant & Bar
51 Suphel Restaurant
52 Hotel Holiday Home
53 Sambhav Apartments
54 Hotel Tsheyang
55 Hotel Peljorling
56 Sonam Trophel
57 Hotel Jomolhari
58 Paro Penlop Dawa Penjor Heritage
59 Phoenix Restaurant
60 Hotel Sonam T.
61 Hotel Sonam
62 Phendey Gakhil Lodge & Restaurant
63 Pegyel Hotel
64 Subash Hotel
65 Yuden Restaurant
66 Hotel Shivling
67 Tshomo Restaurant
68 Tashi Dema Hotel
69 Tshering Restaurant
70 Hotel Phinsum Degoling
71 Chimi Dolma Restaurant
72 Shangri-la Bakery
73 Dechen Pemo Bar
74 K. N Hotel
75 Gang Seng Hotel
76 Lhey Dhey Hotel
77 Divine Cafetering (firm house dining)
78 Rinchenling
79 Drubchhu Resort
80 Hotel Phuntsum
81 Black Necked Crane Hotel
82 Hotel Tashi Gatshel
83 Kinley Hotel
84 YongYang Restaurant
85 Friends Corner Restaurant
86 Momo Corner
87 New Town Hotel
88 Chimi Uden Bar
89 Namsey Restaurant
90 Dragon Nest Resort
91 Tshering Wangda Restaurant
92 Chimi Lhakhang Cafeteria
93 Chimi Namgay Bar Shop
94 Gato Kesum Restaurant
95 Kumar Hotel
96 T-Yang Restaurant
97 Tshering Choki Restaurant
98 Kinten Hotel
99 Thindrel Hotel & Bar
100 Aum Namgay Restaurant
101 Norzang Restaurant
102 Sonam Restaurant
103 Sonam Hotel
104 Momo Corner
105 Karma Restaurant
106 Dechen Restaurant
107 Hotel Haven Inn
108 Dawa Tours & Travels
109 Hotel Sinchula
110 Hotel Paradise Palace
111 Hotel Namgay
112 Hotel Galing
113 Punjab Grand Hotel
114 Dogar Hotel
115 Hotel Pelri
116 Yidga Handicraft
117 Udee Guesthouse
118 Restaurant, Tashicholing Hotel
119 Gongkhar Guest House.
120 Phuntsho Guest House
121 Leki Guest House
122 Ngekhor Hotel
123 Hotel Yedzin Wangel
124 Mountain Resort
125 River Lodge
126 Youzerling lodge
127 Chumey Nature Resort
128 Thongme Yeshi Yathra Factory
129 Owang Travel
130 Mythical Bhutan Travels
131 Bhutan Norter Adventure
132 Tashi Tours and Travels
133 Blue Poppy Tours and Treks
134 Bhutan Sungkay Travel
135 Bhutan Dorji Holiday
136 Amazing Dragon Holiday
137 AMJ Tours and Travel
138 Chhundu Tours and Travels
139 Boonserm Tours and Travel
140 Crystal Bhutan Travel
141 Bhutan Rythmic Mountain Tours & Treks
142 Bhutan Travel Connection
143 Dochula Resort
144 Lamzang International Travel
145 World Travel Service
146 Druk Executive Travel
147 Namgay Adventures Travel
148 Gadhencholing Tours and Travels
149 Bhutan Swallowtail Travel Company
150 Bhutan Kula Adventures & Ticketing
151 Himalayan Adventures
152 Restaurant
153 Hotel Druk Zom
154 Karma Hotel
155 Druk Zhongar Hotel
156 Dorjee Hotel
157 Dawa Loezor [Hotel]
158 Lekja Restaurant
159 Hotel Dendup
160 Nida Restaurant
161 Druk Deojung Hotel
162 Hungza Phendhen Hotel
163 Tamang Restaurant
164 Del Yang Restaurant
165 Pelden Sangay Restaurant
166 Jamtsho Hotel
167 Pelzang Restaurant
168 Namgay Jorphel Hotel
169 Newlee Hotel
170 Lhasa Hotel
171 Wangchuk Hotel
172 Jigme Hotel/Restaurant.
173 Mathang Hotel
174 Tashi ninjay guest house
175 Puenzhi guest house
176 Chadibjee Resort
177 Yangkhil Resort
178 Nana Tours And Treks
179 Gangri Tours & Treks
180 Authentic Bhutan Tours
181 Namgay Heritage Hotel
182 Bhutan Calling Tours & Treks
183 See Bhutan Travels
184 Hotel Sambhar
185 Hotlel Amodhara
186 Bhutan Hotel Pvt Ltd
187 Damchen Resort
188 Tashi Yangkhel Hotel
189 Hotel Home
190 Tshela Hotel
191 Jakar Village Lodge
192 Hotel Damchen
193 Grace Hotel
194 Punsum Hotel
195 Hotel Peljorling
196 Karma Hotel
197 Mountain Journey Tours & Treks
198 Gangtey Palace
199 Ugyen Phendyling Resort
200 Amankora
201 Olathang Resort
202 Nirvana Lodge & Homestay
203 Hotel Lhaki Yangcha
204 Phuntshok Juney Hotel
205 Hotel All Seasons

206 International Treks & Tours Pvt. Ltd
207 Hotel Kamakhya
208 Hotel Dechen
209 Yalama Bhutan Tours
210 Hotel Samden Norzin
211 Karma Restaurant
212 Karma Sherab Hotel
213 Surash Hotel
214 Gamri Hotel
215 Sonam Hotel
216 Karma Hotel
217 Ugyen Kngden Resturant
218 C/O Dalma Hotel
219 K.C Hotel
220 Lapcha Hotel
221 Metho Resturant
222 Sangay Wangmo Resturant
223 Cheki Zangmo Hotel
224 Tenzin Gembo Hotel and Bar
225 Phuensum Resturant
226 Nydra Resturant
227 Shunzey Hotel
228 Gatyurlam Hotel
229 Galaxy Resturant
230 Shangrila Hotel
231 Som Jams Hotel
232 Hotel Tashiling
233 Kuenkhor Resturant
234 Ugyen Choden Resturant
235 Yeedzin Guest House
236 Tours and travel
237 Hotel Thimphu Towers
238 Hotel Dragon
239 Hotel Osel
240 Bhutan Smart Travels
241 Hotel Gakyil
242 Guid Assocation of Bhutan
243 Bhutan Travel Bureau
244 Sinchula Indian Cuisine
245 Hotel Migmar
246 Hotel Pedling
247 Bhan Thai
248 Kara Journey
249 National Travel Servic
250 Bhutan Kaza Tours & Treks
251 Hotel Welcome Home
252 Hotel Ariya
253 Samaya Tours & Travels
254 Hotel Nemo
255 TLF Holidays
256 Holiday in Bhutan Tours & Trek
257 Wangchuk Hotel
258 Bhutan Norter Advanture
259 Palmotara Travels
260 Tsenden Travel Service
261 Bhutan Sandalwood Tours and Tracks
262 Bhutan Men lha Adventures
263 Saga Metho Travel
264 Etho Mentho Tour & Treks
265 Pureland Tours & Travels
266 Bhutan Reisen
267 Hotel Pema Karpo
268 Kalachakra Tour & Treks
269 Zopa Advanture Travels
270 Amen Bhutan Tours & Treks
271 Bhutan Yuden Tours
272 Hotel Centinnial
273 Babasa Village Restaurail
274 Bhutan Lalum Tours & Travels
275 Rochogpel Hotel
276 Bhutan Siliverpine Resprt
277 Khorwa Tours & Travel
278 Mercury Bhutan Tours & Travels
279 Khamsum Inn
280 Wind Horse Tours & Treks
281 Hotel Relax
282 Destiny Hotel
283 SCL Travels
284 Bhutan Everst Tours & Treks
285 Bhutan Sharchop Travel Agent
286 Gaki Tours
287 Bhutan Dynasty Travel
288 AMA Tours & Treks
289 Terma Linca Resort and Spa
290 Gurung Tours & Treks
291 Triple AB Tours & Travels
292 Bhutan Life Exposive Tours & Treks
293 Bhutan Jungle Advanture Travels
294 Hotel AV
295 Absolut Bhutan Travels
296 Takin Travel Services
297 Dorji Elements-boutique Hotel
298 Lhomen Tours & Trekking
299 Active Tours & Treks
300 Vajra Travels
301 Driental Travel Services
302 Jamtsho Bhutan Tours
303 Hotel Rainbow
304 Destiny Bhutan
305 A Way to Bhutan Tours & Travels
306 Gems Bhutan Travels
307 Namsay Advantures
308 Hotel Centernal
309 Bhutan Mountain Holiday
310 Tak Sang Chung Druk
311 Yudruk Tours & Trek
312 Hotel Tandin
313 Bhutan-Bhutan Travel
314 A Middle Path to Bhutan
315 Tashi Yoedling
316 Feminine Bhutan Travels
317 Bhutan Festivel Tours
318 Wine N Dine
319 Bhutan View Tours & Travels
320 Bhutan Foot Print
321 San Maru
322 Hotel Singye
323 Hotel Phuntsho Pelri
324 Le Meridien
325 Bhutan Stainless Travels
326 Padmtara Travel
327 Hotel Shantideva
328 Hotel Tashi Delek
329 Hotel Galingkha
330 Hotel Taksang
331 Hotel Zombala
332 Hotel Jumolhari
333 The Hermony Lodge
334 Hotel Deeya
335 Bhutan Friendship Holidays
336 ABC Travel
337 Atles Ticketing Agent & Tours
338 Bhutan Birind 7 Heritage Travels
339 Druk Sakura Tour
340 Bhutan Beauty Tours & Treks
341 Siliver Dragon Adventures
342 Aman Resort
343 Bhutan Majestic Travel
344 Namseling Boteque Hotel
345 Atlas Tour and Travel
346 Amankora
347 Lhazey Natshog Zakhang
348 Hotel Lobesa
349 Uma by Como
350 Dendup Bar
351 Hotel Pema Karpo
352 Sangay Wangmo Restaurent
353 Lekimo Restaurant
354 Phuntsho Namgyay Hotel
355 Tandin Restaurant
356 Hotel Sonam choden
357 Amankora
358 Diamond Hotel
359 K.N (momo coner)
360 Sonam Om Restaurant
361 Kingaling Hotel
362 Kunzang Zhing Resort
363 Dechen Hotel
364 Y.P Restaurant
365 Hotel Noryang
366 Tamang Restaurant
367 Sha Dagay Restaurant
368 Gauri Maya Yakha Restaurant
369 Dheisa Boutique Hotel
370 Zongthopelri Resort
371 Damchen Resort
372 Sangay Dem Tshongkhang
373 Hotel Vara
374 Y.T Hotel
375 Wangdi Resturant
376 Aum Uden Bar
377 Hotel & Bar (Continental)
378 Aya Tours & Travel
379 Deki Hotel
380 Park Hotel Bhutan
381 Asian Kitchen & Bar
382 Shelgoen Hotel
383 Bhutem Residence
384 Hotel Green Valley
385 Hotel New Everest
386 Hotel New Rignam
387 Hotel Everest
388 Central Hotel
389 Hotel Tashi Delek
390 Hotel Blue Dragon
391 Hotel Druk
392 Peling Resort
393 Gaphel Khachab Tours & Travels
394 Lhaki Hotel
395 The Orchaid Hotel
396 Holiday Hotel
397 Kunga Hotel
398 Hotel Fhola
399 Bhutan Hotel
400 Dechen Hotel
401 Peaceful Resort
402 Hotel & Restaurant Association of Bhutan
403 Bhutan Endless Journey
404 Heaven Resort Pvt. Ltd.
405 Simply Bhutan
406 Semten Guest House
407 Swiss Guest House
408 Hotel Ugyenling
409 Rinchealing Lodge
410 Hotel Kuenzang Norling International
411 Mipham Guest House
412 Kaila Guest House
413 Key to Bhutan
414 Le Meriden Paro, River Front
415 Hotel Peling
416 Amankora
417 Valley Resort
418 Hotel Druk Zom
419 Penjorling Hotel
420 Tashi Gasel Lodge
421 Menjong Hotel
422 Hotel Dekiling
423 Hotel Friends
424 DD Restaurant
425 Hotel Mountain
426 KD Hotel
427 Shambala Hotel
428 Karmaling Hotel
429 Zamling Hotel
430 Hotel Immannel
431 Galing hotel
432 Yangkhil Hotel
433 Panbang hotel
434 Twin dragon
435 Hotel Chorten
436 Kuku Hotel
437 Takin Travels
438 Adorable Bhutan Tours and Expedition
439 Best of Bhutan Tours and Treks
440 Bhutan Gateway Travels
441 Heavenly Bhutan Travels
442 Bhutan Calling
443 Access Bhutan Tours and Treks
444 Bhutan Adventure Travels and Ticketing
445 Bhutan Mask Travels
446 Bhutan Deeyab Tour and Treks
447 Bhutan Mindful Travels
448 Bhutan Haven Agency
449 A.B Travel
450 Aashang's bhutan travels
451 Zoid Jin Tours
452 Zheden Tours and Travels

453 Golden Footprint Tours and Travels
454 Gawaling Tours and Treks
455 Gangkar Adventures and Exp.
456 Green Mandala Tours
457 Sacred Himalaya Travel
458 Snow Leapard Trekking
459 Sophu Tours and Treks
460 Sherabling Tours and Treks
461 Sawaro Bhutan Tours and Treks
462 Sachok Bhutan Travels
463 Druk Holidays
464 Dainty Bhutan Tours and Travels
465 Druk Ugyen Travels
466 Druk Heritage Tours
467 Druk Gayden Tours and Treks
468 Dragon Villa Tours
469 Dharma Adventure Bhutan
470 Dream Paradise Treks
471 Dragon Trekkers and Treks
472 Expert Expedition
473 Reldik Tours and Travels
474 Rainbow Tours and Treks
475 Rewaling Tours and Treks
476 Kuengaling Travels
477 Inner Bhutan Tours and Treks
478 Impress Bhutan Travel
479 Imprint Bhutan Travel
480 Ideal Travel Creations
481 Himalayan Foothills Travels
482 Himalayan Pelay Travels
483 Happiness Kingdom Travels
484 White Umbrella Tours
485 World Tour Plan
486 We Cool Bhutan Tours and Treks
487 Destiny Bhutan
488 Druk Trips
489 Druk and Drukpa Tours
490 Druk Kingdom Expedition
491 Ambient Bhutan
492 Alaya Expedition
493 UT and Sons Travels and Adventures
494 Yelha Bhutan Tours and Travels
495 Yatara Adventure
496 Fertility Tours and Treks
497 Banyan Bhutan
498 Golden Gate Tours and Treks
499 Glimpses of Bhutan Tours
500 Gado Tours and Treks
501 Foot Loose Bhutan
502 Firefox Tours
503 Able Sherab Travels
504 All Bhutan Connection Private Limited
505 Always Bhutan
506 Amedewa Tours and Treks
507 Atma Seva
508 At Your Service Tours and Treks
509 Around Bhutan Tours and Treks
510 Ambrosia Bhutan Travels
511 All Access Bhutan
512 Ahyubada Tours and Travels
513 Awaken Bhutan Tours and Treks
514 Kuentshok Bhutan Tours and Treks
515 Zum Zum Bhutan Travels
516 Direction to Bhutan
517 Druk Happiness Excursian
518 Recess Bhutan Tours
519 Isolated Bhutan Travels
520 Impressive Bhutan Holidays
521 Bhutan All Travels
522 ALC Tours and Treks
523 Aten Bhutan Tour
524 Alaya Travels
525 Abhaya Bhutan Tours and Treks
526 Ardea Insignis Tours
527 Absolute Bhutan Travel
528 All about Bhutan Tours and Travels
529 A and A Bhutan Tours and Treks
530 Adventure Planet Travels
531 A Bucket List Adventure
532 Asia Escapades
533 Dorji Phalam travels
534 Himalayan Sunrise Travel
535 Window to Bhutan
536 Worth a Visit Tours and Treks
537 White Tara Tours and Treks
538 Wild Mountain Adventure
539 Dechen Cultural Tours and Treking
540 Ancient Path Holiday
541 Amuse Tours and Treks
542 Alo Drukpa Tours and Treks
543 All Bhutan Travels
544 Back Country Bhutan Tours and Treks
545 Across Bhutan Tours and Treks
546 Atlas Tour and Treks
547 Amulet luxury Travel Bhutan
548 Hotel Sernya
549 Kotel Kisa
550 Hotel Galingkha
551 Hotel Amodhara
552 Gangtey Goenpa Lodge
553 Gangtey Guest House
554 Hotel Tashi Gatshel
555 Nga Yapling Farm Lodge
556 Hotel Kinten
557 Hotel Dekiling
558 Hotel Dewachen
559 Punatsangchu Cottages
560 Wangclue Eco Lodge
561 Chendebji Resort
562 Norling Hotel
563 Raven Crown Resort
564 Tashi Ninjay Guest House
565 Druk Dedhjung Resort
566 Druk Deothjung Resort
567 Hotel K C
568 Lingkhar lodge
569 Gyelsa Boutique
570 Bhutan centennial
571 Bhutan Suites
572 Druk Hotel
573 Gakyil
574 Ghasel Hotel
575 Tashi Longched Trokhang Hotel
576 Tashi Namgay Resort
577 Gadhen Resort
578 Dheansa Hotel
579 Hotel Norbuling
580 Hotel Thinley Dhendup
581 Choki Farm House
582 Hotel Sonam Yangchen
583 Dangkhar Traditional Lodge
584 Twang Hotel
585 Bajay Hotel
586 Raven
587 Drukies Hotel
588 Bhutan Residence
589 Thrishing Yiwong Villa
590 Tenzinling Resort
591 Namsaycholing Resort
592 Khangkhu Resort
593 Hotel Taksang View
594 Hotel Drukchen
595 Bhutan Metta Resort and Spa
596 Base Camp Hotel
597 The Village Lodge
598 Tashi Phuntshok Hotel
599 Rema Resort
600 Naksel Boutique Hotel and Spa
601 Bongde Goma Resort
602 LhendudCholing Resort
603 Yugarling Resort
604 Wangdicholing Lodge
605 Bhutan Mandala Resort
606 Aum Om Homestay
607 Jakar View Guest House
608 Samyae Resort
609 Norling hotel
610 Hotel yoedzer
611 Gadhen khangzang apartment
612 Garuda inn
613 Hotel89
614 Hotel View Point
615 Meri Puensum Resort
616 Pradhan Hotel
617 Village Hotel
618 Uma Hotels
619 RKPO Green Resort
620 Gaki-choling Hotel
621 Trashigang Hotel
622 Hotel Newlee
623 Dolma Hotel
624 Phayul Resort
625 Tshering Guest House
626 Soednam Zingkha Heritage Lodge
627 TSCD Hotel
628 Lechuna Heritage Lodge
629 Risum Resort
630 Hotel Lhayul
631 Tshen Dhen Hotel
632 Hotel Kham Sang
633 Nirual Lodge
634 Rabten Apartments
635 Thori Resorts
636 Zimchu Serviced Apartment
637 Ugyen Hotel
638 The Horizon Hotel
639 Taj Hotel
640 Penjor Lodge
641 Khenrab Inn
642 Dewachen Resort
643 Hope Tours and travels
644 Shingkhar Retreat
645 Norbu Puensum Tours and Travels
646 Ancient Bhutan Tours
647 Golden Langur Travels bhutan
648 Zardha Tours and Travels
649 Himalayan Tribes and Wildlife Holidays
650 Yatra Bhutan Tours and Treks
651 For all Tours and Travels
652 Kuntugyu Tours and Treks
653 Asia Bhutan Travels
654 Uutlander Travels and Adventure
655 Om Travenza Tours
656 Nangyzer Tours and Expedition
657 Neptune Holidays Bhutan
658 Namo Tours and Treks
659 Ghaden Pelzom Tours and Treks
660 Gyatsho Bhutan Tours and Travels
661 Gothoenley Travel and Tours
662 Glorious Dragon Travel
663 Snow Line Style
664 Shangrila Bhutan Tours and Treks
665 Samdrup Norbu Adventures
666 Sonam Tshoey Travel
667 Sacred Destination Travel
668 Sukhata Tours
669 Snow White Treks and Tours
670 Smile Bhutan
671 Sergi Bumpa Tours and Travels
672 Sakta Tours and Treks
673 Gyeltshen Drindruel Tours and Treks
674 Druk Ugyen Travels
675 Dargyaling Tours and Trek
676 Dream Adventure Travel
677 Experience Bhutan Travel
678 Dhondham Travel
679 Excuision to Himalays
680 Enchanted Kingdom Tours
681 High Hills Travellers
682 Druk Asia Tours and Treks
683 Enhancing Drukyul Journeys
684 Reality Escape Bhutan
685 Rabsel Nima Bhutan Adventure
686 Tiny Himalayan Tours and Travels
687 Thunder Land Tours and Travels
688 The Wheels Tours and Treks
689 The Noble Traveller
690 Terton Travel Bhutan
691 Traveller's Joy Bhutan
692 New life Tours and Treks
693 Yel Zhing De Jung Tours and Treks
694 Yangzom Tours and Treks
695 Yana Expeditions, Inc
696 Yak Holidays
697 Flying Bird Tours and Treks
698 Bhutan Beckons-Bhutan Travel Designer
699 Bhutan Aries Tours and Travels

700 Bhutan Adventures
701 Green Mountain Tours and Treks
702 Great Bhutan Tours and Treks
703 Golden Sky Adventure
704 Dewa Rabsel Adventure
705 Songsten Bhutan Tours
706 D'zom Excursions and Travels
707 Dewa Gaki Tours and Travels
708 Dragon Leisure
709 Elite Scenic Voyage
710 Yangphel Adventure Travel
711 Finest Bhutan
712 Gawa Yarphel Adventure
713 Green Country Adventure
714 Zhidey bhutan Tours and Treks
715 Zhemgang Tours and Travels
716 Yuphel T. Tours and Treks
717 Yu Druk Tours and Treks
718 Druk Eye Tours and Travels
719 Druks Dakini Travels
720 Druk Himalya Travel Services
721 Eden Holiday Bhutan
722 Rinchen Treks
723 Himalaya Karakoram Travel
724 Himalayan Dragon Tours and Treks
725 Hello Bhutan Tours and Treks
726 Happy Holidays
727 Druk Saffari
728 Exotic Destinations
729 Relish Tours Bhutan
730 Revo Tours and Travels
731 Yeadraling Bhutan Tours and Treks
732 Xplore Bhutan
733 Xing Asia Bhutan Travel
734 Aargam Bhutan Expedition
735 Antique Expedition in Bhutan
736 Ananda Bhutan Tours and Treks
737 Access Bhutan Tours and Travels
738 Aakarling Expeditions
739 Knight Adventure Tours
740 Kins Traveller
741 Legendary Bhutan Tours and Travels
742 Zigkor Tours and Travels
743 Serenity Bhutan Travels
744 Happy Tabi Tours
745 Holistic Bhutan Tours
746 Good Karma Travels in Bhutan
747 Kulushey Tours and Travels
748 Kincho Tours and Travels
749 Khamsa Tours and Treks
750 Kesang Travels
751 Diethelm Travel Bhutan
752 Bhutan Infotainment Tours and Treks
753 Bhutan Gulliver Travels
754 Bhutan Gemini Tours and Travels
755 Bhutan Divine Travellers
756 Bhutan Depth Tours and Treks
757 Bhutan Blue Sheep Tours and Travels
758 Bhutan Nomad Adventures
759 Bhutan Merit Travel
760 Bhutan Lhakthong Adventure
761 Bhutan Jewel Travels
762 Bhutan Herders Expeditions
763 Bhutan Happiness Adventure
764 Bhutan Green Travel
765 Bhutan Flying Bird Tours and Travels
766 Bhutan Creative Tours
767 Bhutan Buddhism Travel
768 Bhutan Life exposure tours and treks
769 Bhutan Lhakhor Tours and Treks
770 Bhutan Dzongchen Tours
771 Bhutan Druk Adventiures
772 Oshi Tours and Travels
773 Off to Bhutan Travels
774 Norbulingkha Bhutan Tours and Treks
775 Norbu Bhutan Private Ltd.
776 Nenlee Bhutan Tours and Travels
777 Nirvana Expedition
778 Norge Bhutan and Treks
779 Sershing Tours and Travels
780 Delekkunjung Tours and Travels
781 Druk8 Tours and Treks
782 Druk Peaceful Tours and Treks
783 Druk Bhutan Tours and Treks
784 Druk Dra Travels
785 Discovery Bhutan
786 D and D Tours and Trek
787 REN Tours and Travels
788 Bhutan Omkarmaic Tours and Treks
789 Bhutan Oasis Travel
790 Hhutan Namdruk Adventure
791 Bhutan Karma Trails (BKT)
792 Bhutan Journeys
793 Bhutan Holiday Planner
794 Bhutan Exotic Adventure Travel
795 Bhutan Dragon Adventures
796 Bhutan Darshan Tours and Treks
797 Illuminating Tours
798 Rinson Tours and Treks
799 Yezhin Bhutan Travels
800 Yeti Homeland Adventures
801 Yeoong Tours and Travels
802 Yak Adventure Travel
803 All Traveling Bhutan
804 Almost Heaven Travels
805 Amazing Dragon Holidays
806 Amala Travels in Bhutan
807 Alpine Bhutan Travel Services
808 Bhutan Mak Adventures Travel
809 Gangyam Tours
810 Bhutan Dewdrop Travels
811 Outlander Advisor Travel
812 OHI Bhutan Travels
813 Namrok Tours and Treks
814 Droelma Tours and Travels
815 Dungchong Tours and Travels
816 Druk Trave Services
817 Deki Travel Services
818 Daj Expeditions
819 Bhutan Mahabodhi Tours and Treks
820 Bhutan Gakid Trophel Tours
821 Raidiant Bhutan Expedition
822 Norbu Dhoejung Travels
823 Namo Travels
824 Unique Bhutan Adventure
825 Uling Dharma Tours
826 Yeedzin Tours and Treks
827 Keebu Bhutan
828 High Asia Bhutan Tours and Treks
829 Finding Inner Peace Tours and Treks
830 Gelyoung Tours and Treks
831 Karma Dawa Tours and Treks
832 Northshog Bhutan Travels
833 Find Your Destiny Tours
834 Druk Norzoey Tours and Travels
835 Bhutan Melong Tours And Treks
836 Bhutan Glacier Travel Services
837 Yuden Tours and Treks
838 Hotel Dejong
839 High Valley Tours and Travel
840 Hotel zangtok Pelri

CONSTRUCTION ESTABLISHMENTS THAT PARTICIPATED IN THE EMPLOYER SURVEY

1 U Gee Construction
2 Yid-Ga Construction
3 M/S Phuntshok Gakhil Construction
4 Jambay Construction
5 M/S Somgay Thinley Construction
6 Deki Construction
7 Rinzin Jamtsho Construction
8 Kheng
9 A2Z Construction
10 Dawa Builders
11 Sonam Tenzin Builders
12 Tsamgar Construction
13 PC Enterprise
14 Sangay Sales
15 Mawangpa water solution
16 Mountain Construction
17 H.T Construction
18 Khutshakha Construction
19 B.B Tiwari Construction
20 Chimmi RD Construction Company Pvt Ltd
21 Sangay Zhetho Nangten Construction
22 Tashi Wangchuk Pvt Construction
23 Pema Tenzin Pvt Construction
24 Royal Hardware and Electrical
25 Samphel Construction Pvt. Ltd.
26 Samphel Engineering Works
27 Jigme Polytex Pvt. Ltd.
28 Bumchu Construction
29 Construction of Jyoti Structure Ltd.
30 Yarkay Group Pvt. Ltd.
31 Jhabab Kinley Construction
32 Kinley Phuensum Construction
33 Loeb Construction
34 UL Construction
35 Lungsigang Construction
36 Kora Construction
37 M/s Druk Zamling Builders
38 Yoti Structure (T.N-D division)
39 PHPA-I
40 PHPA-II
41 Tashi Rabphel Construction
42 Hi-Tech Company Pvt Ltd
43 Kinley Phuensum Construction
44 Druk Impex
45 Sonam Rabphel Construction
46 Sonam Rinchen Construction
47 DR Construction
48 Dechen Construction
49 Namgay Construction
50 Dramtse Aane Construction
51 Tshering Samden Construction
52 Dan Peng Construction
53 SNS Construction
54 KW Builders
55 YAS Construction
56 DZS Construction
57 Rigsel Construction
58 Druk Tshering Phumsum Construction
59 Druk Phunsum Construction
60 Pawan Construction
61 Karsang Construction
62 Lozza Construction
63 ADP Bhutan Construction
64 Tashi Samphel Dhondrup Construction
65 Ganesh Construction
66 Norzang Construction

67 Alpha-Beta Construction
68 Choki Construction
69 Arjun Construction
70 Ravan Builders and Company Pvt. Ltd.
71 Lhanam Pelmo Construction
72 Dhungel Construction
73 Thang Tong Builders
74 NN Construction
75 Loygoi Construction
76 KNT Constrution
77 Salden G Construction
78 Chotsho Construction
79 Jorden and Sons Construction
80 Gyalcon Infrastructure Pvt. Ltd.
81 Tiwari Constrution
82 Gortala Construction
83 Rinzing WD Construction
84 Gem Construction
85 UB Construction
86 C & T Construction
87 Somu Construction
88 L.G Construction
89 M/S Chime Phagma
90 Shamling Construction
91 Norbu Construction Pvt. Ltd.
92 Mindu Construction Pvt. Ltd.
93 Chimi S Construction
94 Shari Construction
95 ST Construction and Machinery Hiring
96 Kesang Construction
97 Karma Tsherimg Kinzom Construction
98 Chimi RD Construction
99 Tshozhong Construction
100 Palden Lham Dorji
101 Druk Nano Construction
102 Tandin Penjor Construction
103 Yarab Construction
104 Chencho Dorji Construction
105 Soms Construction
106 Rinchen SD Construction
107 J.K Construction
108 STT Construction
109 Tawa Construction
110 Y. C Construction
111 Doejay Construction
112 Dolma Construction
113 Somden Construction
114 Ugyen Chophel Construction
115 Dupchu Construction
116 Ugyen Tshering Construction
117 Ugyen Construction
118 Sangay Construction
119 Rinchen Construction
120 Tshering Dagyel Construction
121 Choeyuel Construction
122 Naala Construction
123 Lha-Ten Construction
124 Choi Lodey Construction
125 Pema Jamtsho Construction
126 Shadang Construction
127 Namsel Yarphel Construction
128 Gayser Construction
129 Lhendup Construction
130 Panday Construction
131 Druk Namsey Construction
132 Ugyen Dema Dupchu Construction
133 Remin Construction
134 Phuntsho Rabjorling Construction
135 Sonam Yeshey Construction
136 Sunshine Construction
137 Friendship Builders
138 Ap Phunsum Construction
139 Seldon Construction
140 Rickphel Construction
141 Apex Construction
142 Kelwang Private Limited
143 Thinsum Construction
144 Thilam Construction
145 K/W Construction Company
146 Deki Samphel Construction
147 Sons Builders
148 SNS Construction
149 Norbu Choden Construction
150 Druk Lhayuel Construction Pvt. Ltd.
151 K. Ngawang Construction
152 Welcome Construction
153 M/S Rinzin Construction
154 Paldhen Namgyal Construction
155 Taju Construction Pvt. Ltd.
156 Rinchen Gyeltshen Construction
157 KC Construction Pvt. Ltd.
158 M/S Pema Juney Pvt. Ltd.
159 Bhutan Engineering Company Pvt. Ltd.
160 M/S. NC Construction
161 Neten Construction Private Limited
162 D. K Construction
163 T.P Wangmo Construction
164 Kabab Construction
165 J. D Pvt. Ltd.
166 Druk Trading Equipment Pvt. Ltd.
167 Real Estate Business (NHDCL)
168 Karma Yangki Construction
169 M/S Lhawang Construction Pvt. Ltd.
170 Druk Kunzang Construction
171 Druk Ngawang Dorji Construction
172 Thuen lam Pvt. Ltd.
173 Druk samdeen Construction
174 M/S Phuensum Builders Pvt. Ltd.
175 M/S Namgay Construction
176 Panglung Construction
177 NEO Engineering
178 M/S NTT Construction
179 Ud & Partners: Advocates and Consultants
180 Drukair Construction Pvt. Ltd.
181 Gyelsa Tewa Real Estate Construction
182 Druk Paju Construction
183 Parkay Construction
184 Add Bhutan Construction
185 Tashi Enginerring Workshop
186 K.S.D Ventures
187 Dekiling Builders Pvt. Ltd.
188 Gaseb Construction Pvt. Ltd.
189 Mamshin Shitaka Construction Co. Inc.
190 Jaiprakash Associates Ltd.
191 M/s Gyambo Construction
192 Kuenga Construction Pvt. Ltd
193 Bhutan Engineering Company Pvt. Ltd.
194 Norbu Yeabar Foreign Workers
195 Cement Agent
196 Norzang Builders
197 Drukar Construction Pvt. Ltd.
198 Chimmi K D Construction Pvt. Ltd.
199 Khangma Construction
200 D 10 Zi Builders
201 Pasang Construction
202 Lamnekha Construction Pvt. Ltd.
203 Singye Construction Pvt. Ltd.
204 Construction Association of Bhutan
205 Environment Friendly Cont. Pvt. Ltd.
206 STP Construction
207 Rigdrel Construction
208 Sunlight Construction
209 Yarab T Construction
210 D D Construction
211 Tshering Construction Pvt. Ltd.
212 Norbu Dhendup Construction
213 S T Thuendrel Construction
214 Druk Tshering Construction
215 Samten Construction
216 S N Construction
217 Druk Himalayan Construction Pvt. Ltd.
218 M/s K. T. Jamsel Construction
219 Kachopa Construction
220 Fearless Construction
221 Tha Yee Theak Construction
222 Four Brothers Construction
223 T. W. Wooling Construction
224 Norzin Samdrup Construction.
225 Phendey Dendup Construction
226 Jigme Wangchuk Construction
227 Pema Yoedzor Construction
228 Choney Dema Construction
229 R. Lhaden Construction
230 Tenzin Builders
231 JND Cnstruction
232 KSD Venture
233 Druk Wangyel Construction
234 Gyeseling Construction
235 Nyda kar Sum Construction
236 LP Construction
237 Karzin Construction
238 Phuntsho Construction
239 DD Construction
240 Tenzin Wangchuk Construction
241 Rephey Construction
242 Tenzin Construction
243 Chung Construction
244 Tshering Construction
245 Penjor Construction
246 KST Construction
247 Khandu Construction
248 Cheychey Construction
249 Druk Penjor Construction
250 Paychu Construction
251 Tshering Chuenga Construction
252 Tshechu Construction
253 Phuntsho Nima Construction
254 Rickey Construction
255 Yongba Construction
256 Chophel Construction
257 M/S Ugyen Tshering Construction
258 Khorapan Construction
259 Chechung
260 Tashi Gongphel Jangchuk Construction
261 M/S Wongjur Construction
262 Mongling Construction
263 Pema Dhendrup Construction
264 Rinzin Wangyel Construction
265 M/S TDE Construction
266 Singyel Construction
267 Tenzin Tshedrup Construction
268 Tacho Construction
269 KTP Construction
270 Phayul Construction
271 Sonam Construction
272 Ringdrel Construction Pvt. Ltd.
273 Karma Group of Construction
274 Gadhen Chhoetse Construction
275 T Norbu Construction
276 Dorji Builders
277 Tshering Construction Works
278 Kuenchap Construction
279 Rabjung Construction
280 Sherab Construction
281 PT Construction
282 A Bhutan Construction
283 M/S Eight Builders
284 M/S Sipsu Construction
285 RP3 Builder
286 M/S KN Construction Pvt. Ltd.
287 Eight Builders
288 M/S TNG Construction
289 Norbru Construction Company Pvt. Ltd.
290 Construction Development Corporation Ltd.
291 Aaja Construction
292 Bhutan Urban Development
293 Chakta Construction
294 Banga Construction
295 Carpenter Dorji Construction
296 C.T Construction
297 Cheki Wangmo Construction
298 C. Lhaki Construction
299 Tangsibji Hpdro Poer Plant
300 S.L construction Pvt. Ltd.
301 K & P Construction
302 K & W Construction Company
303 K Jigme Tshomo Construction
304 K. Rangrik Cons. Com. Pvt. Ltd.
305 K. Rinzin Construction

306 K. Tobgyel Construction
307 K.Bhim's Construction
308 K.J. Builders
309 K.K. borthers Construction
310 K.K.P Construction
311 K.M.G. Construction
312 K.P Construction
313 K.R. Construction
314 Kaila Construction
315 Kamal Builders
316 Kapurung Construction
317 Kararia Construction
318 Karden Construction
319 Karju Construction
320 Karma Choden Construction
321 Karma Construction
322 Karma Construction
323 Karma Dhendup Construction
324 Karma Dorji Construction
325 Karma Dupchu Construction
326 Karma Dzambala
327 Karma Engineering Construction
328 Karma Gyeltshen Sherpa Construction
329 Karma Jigme Construction
330 Karma Layrabling Construction
331 Karma Nidup Construction
332 Karma Pee Construction
333 Karma Rabten P. Construction
334 Karma Rigphel Construction
335 Karma Samphel Construction
336 Karma Samyul Construction
337 Karma Singye Construction
338 Karma Tashi Construction
339 Karma Tenzin Construction
340 Kencho Tshering Construction
341 Kencho Tshering Construction
342 Kencho Wangmo Construction
343 Kenphu Construction
344 Keshidung Construction
345 Kessyoe Construction
346 Kexiphu Construction
347 Khamphu Construction
348 Kharsa Construction
349 Khazhi Construction
350 Khem Nath Construction
351 Khempajong Const.
352 Khenab Drawa Friendly Construction
353 Khensey Construction
354 Khiney Construction
355 Khominang Construction
356 Khorlo Construction
357 Khoushan Construction
358 Khuju Construction
359 Khulal Construction
360 Khuzu Construction
361 Kibulungten Construction
362 kibulungtsen Construction
363 Kichu Construction
364 Kinzang Construction
365 Kuenzang Wangmo Construction
366 Kuku Construction
367 Kunchap Tshering Construction
368 Kunjung Phendey Construction
369 Kunzang Delay Construction
370 Kunzang Dhendup Construction
371 Lamluk Construction
372 Lamzang Builders
373 Langa Dorji Construction
374 Langa Tshering Construction
375 Kholongchu Construction
376 Kilkhor Construction
377 Kinga Namdrub Construction
378 kinga Tandin Construction
379 Kinley Builders
380 Kinley Construction Pvt. Ltd.
381 Kinley Jabab Construction
382 Kinley Tenzin cons.
383 Kinley Tshokey Dorji Construction
384 Kinley Wangmo Construction
385 Kinzang Duba Construction
386 Kinzang Lhaden Construction
387 Kinzang Rapten Construction
388 Kinzang Wangchuk Construction
389 Kipchu Construction
390 Kismat Construction
391 Kither Nangkhor Construction
392 KKTS Construction
393 KKTS Construction
394 KKW construction
395 KNCC
396 Kosphu Construction
397 KP. Builder
398 KSL Construction
399 KSS Construction
400 KT Construction
401 KTK Construction
402 Kuenchab Construction
403 Kuenchab Rabten Construction
404 Kuenden Norbu Phuntsho Construction
405 Kuenga Dendup Construction
406 Kuenga Dhendup Construction
407 Kuenjam Construction
408 Kuenjung Construction
409 Kuenjung Norbu Builder Construction
410 Kuenlay Construction
411 Kuenphen Norden Mining
412 Kuenphen Samdrup Construction
413 Kuenphen Tshering Construction
414 Kuenzang Construction
415 Kuenzang Construction
416 Kuenzang Parkaling Construction
417 Kuenzang Steel Fabrication Yard
418 Kuenzang Yoezer Construction
419 L&K Construction
420 L. Norbu Construction
421 Labchen Construction
422 Lachu Construction
423 Lakden Construction
424 Lama Construction
425 Lama Construction
426 Lamdruel Zang Builder
427 Lamki Construction
428 Lamzang Builders
429 Langchen Rabtsel Construction
430 Larjab Construction
431 Larjab Construction
432 Lawang Jaging Construction
433 Layo Construction
434 Lekden Construction
435 Lekdra Construction
436 Lekey D. Construction
437 Leki Construction
438 Leki Wangmo Const.
439 Lekphel Dargay Construction
440 Leksoo Construction
441 Lekzin Construction
442 Lha Tshering Construction
443 Lhab Tshering Construction
444 Lhachen Construction
445 Lhamo Wangyel Construction
446 Lhamun Phublu Construction
447 Lhanan TRM Construction
448 Lhanzin P Construction
449 Lhatsham Construction
450 Lhawang Gyajin Construction
451 Lhawang jajin Construction
452 Lhawang Tshultrim Construction
453 Lhayul Lhamton Construction
454 Lhendup Choling Construction
455 Lhendupcholing Const. Mongar
456 Lhenduptse Construction
457 Lhenpo Construction
458 Lhoushing Construction
459 Lichen Construction
460 Lingden Builders
461 Lingmu Construction
462 Lingzhi Construction
463 Longcho Phuntsho Construction
464 Lotey Construction
465 Lovely Construction
466 LRK Construction
467 LS Construction
468 Luchu Construction
469 Lucky Builder Construction
470 Lucky Gongphel Construction
471 Lucky Seven Construction
472 Lunglay Thilkor Construction
473 M.T. Construction
474 M/s ABG Construction
475 M/s Balay Construction
476 M/s Budha Construction
477 M/s Chang Sonam Construction
478 M/s Chhoeying Construction
479 M/S Chophel Construction
480 M/s Dargaythang Builders
481 M/S Dhen Den Construction
482 M/S Drupchen Construction
483 M/s Gangzur Construction
484 M/s Gesarling Construction
485 M/s Hem Raj Construction
486 M/s Jaishi Tsangkhar Construction
487 M/s Jamyang Deker Construction
488 M/s K.B. Construction
489 M/s Keltsho Construction
490 M/s Kelzang Dee Construction
491 M/s Krishna Construction
492 M/s Lama Industry
493 M/s Lhendup Norbu Construction
494 M/s Moktan Construction
495 M/S Mongling Construction
496 M/s Mukhia Construction
497 M/s Namchu Construction
498 M/s Norbugang Construction
499 M/s Omchu Construction
500 M/s Paradise Construction
501 M/s Purna Construction
502 M/S Rukphel Construction
503 M/S Sershong Construction
504 M/s SNS Construction
505 M/s Tashi Dhargay Construction
506 M/S Tenzin Dorji Construction
507 M/s Tenzin Lhendup Const.
508 M/S Thukten R Tshering Construction
509 M/s Thukwang Construction
510 M/s Tshering Dorji Construction
511 M/S U. C Construction
512 M/S Ugyen Chophel Construction
513 M/s Yeshey T. Denkar Construction
514 Machi Sonam Construction
515 Maha Guru Construction
516 Mahaba Lha
517 Mahat Construction
518 Mangal Bir Construction
519 Mangmu Construction
520 Sonam Jamtsho Bros. Construction
521 Sonam Jordden Construction
522 Sonam Samphel Norbu Construction
523 Sonam Tshewang PL
524 Sonam wangchuk Construction
525 Sothi Construction
526 Southzone Builders
527 T.T. Construction
528 T.Tobgyal Construction
529 T.W. Construction
530 T.Wangdi Construction
531 Tabdey Zakhang
532 Tachey Construction
533 Tadongchen Construction
534 Tangmachu Construction
535 Tangpa Construction
536 Tashi Cheki Construction
537 Tashi Commercial Corporation
538 Tashi Construction
539 Tashi D Wangmo Construction
540 Tashi Deyjung Construction
541 Tashi Dorji Construction
542 Tashi Gatshel Construction
543 Tashi Gongphel Construction
544 Tashi Gongphel Construction
545 Tashi Lhadhar Construction
546 Tashi Samdrup Construction
547 Tashi Samphel Construction
548 Tashi Zagay Construction
549 Tashilhakha Construction
550 Tashiling Construction
551 Tawla Construction
552 TDC Construction
553 TDE Construction
554 TDL Construction.

555 Tenzin Wangmo Construction
556 Terbura Construction
557 Terdha Construction
558 TGD Builder
559 TGD Construction
560 Thak Chu Choey Yang Construction
561 Tharchen D K Construction
562 Tharzom Construction
563 Thimphu Construction
564 Thimphu Home Builders
565 Thingaysa Construction
566 Thinley Gyeltshen Construction
567 Thinley Pema Construction
568 Thong Brag Construction
569 Thrimla Construction
570 Thruebaap Construction
571 Thrungthrung Construction
572 Thuempa Phunsum Construction
573 Thuji Construction
574 Thukdyrel Construction
575 Thukten Construction
576 Thukten Tshering Construction
577 Tobden Dorji Wangdi Construction
578 Tobden Tendrel Wangchuk Construction
579 Tobden Tshewang Lhaden Construction.
580 Toe Toe Construction
581 Toetsho-Kheni Construction
582 TP Wang Construction
583 TPT Construction
584 T-Pyalvor Construction
585 Trophel Construction
586 Trustma Construction
587 Tsasum Construction
588 Tsasum Yangphel Construction
589 Tsewa Chesum Construction
590 Tshachu Construction
591 Tshamchey Construction
592 Tshangkha Construction
593 Tshangkhab Construction
594 Tshe Lha Nam Sum Construction
595 Tshe Tshe Construction
596 Tshechab Construction
597 Tsheltrim Dorji Construction
598 Tshen Construction
599 Tshenda Construction
600 Tshenden Pema Construction
601 Tsheram Construction
602 Tshering Che-nga Construction
603 Tshering Choden
604 Tshering Choekhor Construction
605 Tshering Construction, Lhuntshi
606 Tshering Construction
607 Tshering Dugay Construction
608 Tshering L Construction
609 Tshering Nidup Construction
610 Tshering Nima Construction
611 Tshering Peldhar Construction
612 Tshetrim Rinzin Construction
613 Tshomen Construction
614 Tshomo Construction
615 Tshondrup Construction
616 Tshongdi Construction
617 Ugyen Donnga Weazer Construction
618 Ugyen Guru Construction
619 Ugyen Guru Construction
620 Ugyen Lhamo Construction
621 Ugyen Namkha Dorji Construction
622 Ugyen Norlha Construction
623 Ugyen Penden Construction
624 Ugyen Samden Dendup Construction
625 Ugyen Samphel Construction
626 Ugyen Samten Dendup Construction
627 Ugyen Sonam Construction
628 Ugyen Tenzin Construction
629 Ugyen Tshendhen Construction
630 Ugyen Tshokling Construction
631 Ugyen Tshomo Construction
632 Wangdi Shermung Construction
633 Yargay Phuensum Construction
634 Yarphel Construction
635 Yarpheling Construction
636 Yearang Construction
637 Yeched Construction
638 Yegha Construction
639 Yenrig Gongphel Construction
640 Yenten Construction
641 Amochu Builders
642 Barchu Construction
643 Bayling Construction
644 BBT Construction
645 Brother Construction
646 Buli Builder
647 Buli Construction
648 Bumthang Construction
649 Busum Construction
650 Butter Lamp Construction
651 Cheda Construction
652 Cheelay Construction
653 Cheki Dorji Construction
654 Chemkhar Construction
655 Chenathang Construction
656 Cheney Construction
657 Chenrigzey Construction
658 Chenzom Construction
659 Chethuen Construction
660 Chime Phagma Construction
661 Choda Construction
662 Choki Lodey Construction
663 Choni Construction
664 Chophel Seldon Construction
665 Chorphu Kinzang Construction
666 Chorten Kora Construction
667 Daksar Construction
668 Damcho Lhamo Construction
669 De-Zang Construction
670 Dhadrel Construction
671 Dhakzhen Phendhey Construction
672 Dhalikhar Construction
673 Dhaniyal Construciton
674 Dhanka Chen Construction
675 Dhedjung Lhameh Construction
676 Dhejung Sarma Construction
677 Dongdi Dzong Construction
678 Dongnga Cheling Choki Construction
679 Dorji Construction
680 Dorji Drakpa Construction
681 Dorji Gyeltshen Const.
682 Dramaru Const.
683 Dramay Khorlo Construction
684 Drime Kuendhen Construction
685 Druk Chedhen Construction
686 Druk Cherthen Construction
687 Druk Choki Construction
688 Dungla Construction
689 Gaki Phuntsho Construction
690 Garab Wangchuk Construction
691 Gayphu Construction
692 GD Phub Construction
693 Gems Construction
694 Golden Construction
695 Gongza Construction
696 J.K. Lhaden Construction
697 Jaibab Penjor Construction
698 Jakeer Construction
699 Jam Nying Gar Construction
700 Jamtsholing Construction
701 Jamyang Naku Construction
702 Jangchub Wangdi Construction
703 Jangchubling Construction
704 Jangchukla Construction
705 JD Construction
706 Jeeba Construction
707 Jetshen Dema Construction
708 Jigdrel Construction
709 Jigme C. Construction
710 Jigme Dorji Construction
711 Jogdra Construction
712 Jogta Construction
713 John Dzana Engineering Works
714 Jonshing Construction
715 Nagtshang Construction
716 Namgay D. Wangchuk Construction
717 Namsay Norbu Construction
718 Namshing Construction
719 Nangsel Dema Construction
720 Neten Duba Construction
721 Ninda Gapailing Construction
722 NKK Construction
723 Norzin Norphel Construction
724 Nuermo Pamo Construction
725 Nyamchung Construction
726 Yumzor Construction
727 Yungdrung Construction
728 Zambala Construction
729 Wangchen Talop Construction
730 Wangchuck Duppa Steme Pvt. Ltd.
731 Wangdi Construction
732 Wangling Construction
733 Wangmo Construction
734 Wangs Pvt. Ltd.
735 Woesel Norchen Construction
736 Zagmay Pakchu Builders
737 Zambala Construction
738 Zamsa Construction
739 Zangden Construction
740 Zawang Lhazom Construction
741 Zeko Dukpa Construction
742 Zhabky Construction
743 Zhalzey Construction
744 Zhemgang Construction
745 Zhenphen Dorji Construction
746 Zobel Construction
747 Zomiling Construction
748 Zomnaya Construction
749 Rabgay Noryang Construction
750 Rabnyur Construction
751 Rabsel Charu Construction
752 Rabsel Construction
753 Rabten Lhanam Construction
754 Rada Dorji Gyeltshen Construction
755 Radak Construction
756 Radhi KYW Construction
757 Ragna Construction
758 Raj Construction
759 Rana C. Builders
760 Rangjung Dewa Construction
761 Rapten Losel Construction
762 Raven Builders & Co. Pvt. Ltd
763 Rayna Kuendrup Construction
764 RC & BM Construction
765 RDP Construction
766 Rewa Samphel Construction
767 Rigsar Construction Pvt. Ltd.
768 Pelbar Geyphel Construction
769 Pelbayu Construction
770 Pelchen Jungney Construction
771 Peldang Construction
772 Pelden Drukpa Construction
773 Peling Construction
774 Peling Sherab Construction, Mongar
775 Peljor Lhendrup Construction
776 Peljore Gongphyell Construction
777 Pelnor Construction
778 Pem Cee Construction
779 Pem Peljor Construction
780 Pema Construction
781 Pema Construction
782 Pema Dorji Electrical Construction
783 Pema Dungtse Construction
784 Pema Nyngpo Construction
785 Pema Q Construction
786 Pema Rinchen Construction
787 Pema Wangdi Construction
788 Pema Wangmo Construction
789 Pema Weezer Construction
790 Pema Yangdon Builders

PRODUCTION ESTABLISHMENTS THAT PARTICIPATED IN THE EMPLOYER SURVEY

1 Bhutan Polymers Corporation Limited
2 Samphel Furniture House
3 Palabi Furniture
4 Kuenphen Norden Mining
5 NGN Technologies Pvt. Ltd.
6 K Norphel Enterprise
7 Khandum Furniture and Décor
8 Bhutan Observer Private Limited
9 Image Arts, Pants and Rubber Seal
10 Norphel Chocha Handicraft
11 Dezang Pezokhang
12 Excel Furniture and Home Furnishing
13 Godrej Furniture
14 KR Furniture
15 Bhutan Enterprise (Furniture)
16 BK Furniture
17 Druk Horticulture Private Limited
18 Kuenchap Bakery
19 Yiga Radio
20 Bumzang Fabric and Paper Unit
21 KMT Printing Press
22 Bhutan Agro Industrial Limited
23 Willy's Ice Cream
24 Nima Lotey Fiber Services
25 Sky Bakery
26 RSA private limited limestone unit
27 Quality Stone and Aggregate Factory
28 Manufacture of Glass fiber concrete
29 Kuenphen Wood Works and Fabrication
30 Interlocating Cement Earth Block
31 Karma Furniture house/Zobel Furniture
32 Mejir Handicraft
33 Highland wood
34 Loten Fabrication
35 Chunder Bakery
36 Dairy Milk Sale Counter
37 Bubu Bakery
38 DMT Bricks
39 Laki Zangmo Handicraft
40 Dorji's Bakery
41 Y.B.M (concrete products)
42 Besogang Stone Quarry Private Limited
43 Ghasel Handicraft
44 Kabisa Dairy Products Outlet
45 The Gourmet Food House
46 White Tare Ceramics
47 Singye Stone and Sand Factory
48 Taktsang Aggregate and sand company
49 Sonam Sawmill
50 Ngawang Wood Works
51 Nortak Mines and Minerals
52 Druk Menjong Wood Industry
53 Tashi Lhendrup Furniture
54 Tshejor's Ayzey
55 Nado Poiokhang
56 Kinz Farm Mushrooms
57 Life Painting Demonstration
58 Yoedpame Studios
59 Army Welfare Sawmill
60 Central Café
61 Menjong Sorig Pharmacatrical
62 Big Bakery
63 Dhom Zang Wood Works
64 Samphel Furniture House
65 Zamling Arts and Rubber Stamps
66 The Druk Pizza
67 Rabten Wire Industry
68 Natsho Fabrication works
69 Gyeltshen Drezim Incense Unit
70 Bhutan Ferro Alloys Limited
71 Jigdrel Woodworks
72 Dechen Sawmill
73 Sonam Lhaden Yatha Tshongkhang
74 Samden Chuzing Furniture House
75 Sangay Dorji Tailoring
76 CDCL Mining and Quarry
77 Dorji Tailoring
78 Roja Resturant and Bar
79 Puensum Bakery
80 Tashi Yangthang Tailoring
81 Choki Restaurant
82 Ratna Bakery
83 Sonam Pem Restaurant
84 Noryang Tailoring
85 Lhashoes Bakery
86 Khuenphen Poultry Farm
87 Natshe Furniture
88 Samdrup Shingkham Kunkhaup Incense
89 Lhendrup Furniture House
90 Gyelposhing Furniture House
91 KCT Blocks and Aggregate Supply
92 Norbu Sawmill
93 Quality Furniture House
94 Norbu Furniture/Showroom
95 Nida Karsum Hotel
96 Lhazang Mushroom
97 Thinley Choden Handicraft
98 Shangirila Bakery
99 Choden Sawmill
100 Echo Cement Whole Seller
101 Dungsam Cement Corporation
102 Dwazang
103 Penden Cement Authority Limited
104 Bhutan Fruit Product Pvt. Ltd.
105 Jigme Sawmill
106 State Mining Corporation Ltd.
107 ICE Beverages Private Limited
108 Tshering Stone and Aggregate Factory
109 Kuenphen Wang Pharmacy
110 Chheden Mill
111 Yangnor Beer Agency
112 Rewas Enterprise
113 Sonam Enterprise (Distributor)
114 KYT Photo Studio
115 Jai Prakash Grocery
116 DGM Geology and Mines
117 Norbuling Bakery
118 Samtse Poultry Corporative
119 Norbuling Poultry Farm
120 Sonam Pelzom Tailoring
121 Khamsum Wangdi Confectionery
122 Kden Darma Production
123 Tsong Tsong Ma Production
124 Tshering Meto Audio Visual
125 Choezang Motion Picture
126 Atsara Entertainment
127 Pelbarling Audio Visual
128 Yailoring
129 Lhazang Handicraft
130 Druk Handicraft
131 Shiva Modern Arts
132 Buddhist Art Gallery
133 Tashi Dagay Handicraft
134 Authentic Bhutanese Furniture
135 Norbu Handicraft
136 Kuensel Corporation
137 Om Tara Handi Craft
138 Pema Choden Furinture
139 Tshenda Confectionery Bakery
140 K.K Furniture
141 Jangchub Furniture
142 Chenga Dawa Sawmill & Furniture
143 Integrated food processing plant
144 Rinchen Poultry Farm
145 Dharma Arts and craft
146 RSA Pvt. Ltd.
147 Chundu Timber Industry
148 National Seed Centre, MoAF
149 City Print
150 Printing Press
151 Norbu Dezang Incense Factory
152 Bhutan Concrete bricks
153 Bhutan School of art and music
154 Lamp Cement Agent
155 Gurung Flowers & Plants (Nursery)
156 Dargon Impex
157 Kinzang Choden Incense Making
158 Bakery
159 Manufacturing of Beer
160 Choden Cement Agency
161 Tashi Commercial Corporation
162 Ugyen Ferro Alloys Pvt. Ltd.
163 Lhamo Printing Press
164 Chimi Sawmill and Wood Industries
165 Quantity Gases Pvt. Ltd.
166 Kimpex Pvt. Ltd. (soap unit)
167 Tashi Carpet Factory
168 Propical Toppings
169 Zangpo Bakery
170 Dralha Flour Mill
171 Tashi Matha Factory
172 Tashi Tarpaulin Factory
173 Kingyal Coke & Chemicals Pvt. Ltd.
174 Bhutan Salt Enterprises
175 Bhutan Indo Company Pvt. Ltd.
176 Jigme Saw Mill & Furniture
177 Drangchu Beverages Pvt. Ltd.
178 Bhutan Plastic Industry
179 Tashi Beverages Limited
180 Phuntsho Timber Industry
181 KMT Printing Press
182 Gognphel Wood Industries
183 Yangden Wood Based Industry
184 Lakey Cable Network
185 Langchenphu Livestock Fishery
186 Tsheiring Steel works
187 Barma Chemical Industry
188 Tashi Commercial Corporation
189 Pema Lhaden Sawmill
190 TD Metho Cable Service
191 Karma Furniture House
192 Himalayan Wooden Furniture House
193 Norphel Handicraft
194 Prayer Wheel Handicraft
195 Dorji Jeweleries Handicraft
196 Namsay Textile
197 Rinchen Furniture House
198 Chenzo Furniture House
199 Namgay Furniture House
200 Kay Tee Furniture
201 Ani Furniture House
202 Jigme Furniture
203 Jachung Bakery
204 Dechen Furniture House
205 Kuenga Sawmill and Furniture Unit
206 Jigdrel Handicraft
207 Bhutan Broadcasting Service
208 Gyeltshen Furniture House
209 Bhutan Communications Services
210 Kelven Furniture House
211 Sky Bakery
212 Green Manufacturing and Repairing
213 Buddhist
214 Bhutan Stone and Aggregate Factory
215 Rabten Sawmill
216 Asha Bakery
217 Ugyen's Silverlining Handicrafts

218 Choki Lhamo Tailoring
219 Traditional Boot House
220 Choe Cha Arts and Crafts
221 Art Café
222 Tashi Delek Handicraft
223 Art Shop Gallery
224 Norling Cable
225 Druk Orchid Nursery
226 Nono Furniture
227 Puensum Bakery
228 Green Print
229 Norbu Bakery
230 Yarkay Production
231 GSM Furniture and Fabrication
232 Ongdi Timber Industries
233 KNG Fabrication
234 Bhutan Concrete Bricks
235 The Green Road
236 Wood Craft Centre Ltd.
237 Gagyel Lhundrup Weaving Center
238 Bumthang Fabrication Work
239 JK Furniture
240 Ugyen Om Sawmill
241 Lhacham Mineral Industry
242 Lhaki Cement
243 Kenpa Pvt. Ltd.
244 Passang Tara Wood & Woods
245 Rinpung Sawmill
246 Chencho Dema Furniture House
247 Karma Dema Furniture House
248 Lhamo Choden Furniture Unit
249 Zangmo Furniture House
250 Chencho Handicraft
251 Wangchuk Wood Tech Unit
252 National Women's Association of Bhutan
253 Bhutan Film Association
254 Swiss Bakery
255 Lhaki Steels and Rolling Pvt. Ltd.
256 Bhutan Metals Pvt. Ltd.
257 Staples and Jattu Wood Industry
258 Druk Cement
259 Zimdra Food Pvt. Ltd.
260 Sampheling Meday Bja Nyamrub Detshan
261 Druk Ferro Alloys Limited
262 Food Corporation of Bhutan
263 Bhutan Furniture and Steel Furniture
264 KTM Bakery
265 Mil Processing Unit
266 Pema Mobile Sawmill
267 Bumthang Brewery
268 Udee Enterprises
269 Sonam Woodworks
270 Weaving Centre
271 Raven Furniture House
272 A & Di Furniture
273 Bhutan Media and Communi-cations
274 Druk Men-Wang Fabric Unit
275 Om Bakery
276 Bhutan Wood & Panel Industries
277 Bhutan packaging industry
278 Karma Steel and Wood Industry
279 SD Eastern Bhutan Ferro Silicons Ltd.
280 Druk Plaster & Chemicals Ltd.
281 Geyzor Poultry Farm
282 SD Eastern Bhutan Load Co. Ltd.
283 Pema Bekery
284 Kuenchap Wood Based Industry
285 Tashi Phuntsho Furniture House
286 M/S Karma Zokhang
287 Sonam Bricks Manufacturing
288 Gaylek Palter Furniture House
289 Tshering Steel Works
290 Pema Tyres
291 Thinley Pelber Printer Press
292 Chodak Trading & Tyres
293 S.T Bakery
294 Bhutan Sweet & Snacks Bakery
295 Mountain Fresh Private Limited
296 Army Welfare Project Ltd.
297 Karten Oil Mill
298 Druk Green Power Corporation Limited
299 Bhutan Polythene Co. Ltd.
300 Thangtong Iron& Steel Production
301 Ation Bitumen Enulision Manufacturing
302 Bhutan PLY
303 Tyre Zone
304 SDEBFS (P) Ltd.
305 Tashi Lngchi Trokhang
306 Druk Satair Corporation Ltd.
307 Bhutan Oil Corporation
308 Bhutan Power Corporation
309 Demcha Supplier & Distributer
310 Tashi Group of Agent
311 Damchen Agencies
312 Gelephu Bakery
313 Kuendey Printing Press
314 Kuengacholing Poezokhang
315 Kuengacholing Cement Concrete Brick
316 Beverage Production
317 Bhutan Oil Corporation
318 Kunjung IT & Innovation
319 Bhutan Power Corporation
320 Tashi Commercial Corporation
321 DPCL, (Tashi Commercial Cooperation)
322 Samdrup Sawmill
323 Bhutan Bakery
324 Yangjung Sonam Bricks & Steel Fab. Ent.
325 Gyaltshen Wood Industries.
326 Gyaltshen Furniture House
327 Karma Cement Agent
328 Booster Printing Press
329 Dungsum Polymers Ltd
330 Food Processing Unit
331 Druk Photo Lab
332 Agro Production (Bhukari)
333 Namsel Handicraft
334 P.D Production
335 Piggery Farm
336 Phuensum Entertainment
337 Sangay Bakery
338 Sangay Arts and Crafts
339 Samden Sand and Stone Quarry
340 Samphel Workshop/Fabrication
341 Samba Auto Workshop
342 Bhutan Hydropower Services Ltd.
343 Neetshel Pvt. Ltd.
344 Nephu Handicraft
345 Ngawang Dapa
346 Ngawang Furniture House
347 Ngawang Sonam Lhundup /Work-shop Fabrication, Mongar
348 Ngawang Tenzin Potato Chips
349 Nidup Pemo Dairy Farm, Gangzur
350 Nidup Zangpo Dapa
351 Nima Chozey Khang Handicraft
352 Nima Desho Production
353 Nima Karma Dapa
354 Nima Yosel Presents
355 Niwong Piggery Farm
356 Norbu Dapa
357 Norbu Wangdi Dapa
358 Norbu Wangdi Piggery Farm
359 Norgay Fabrication
360 Norgay Bakery, Duksum
361 Norlha Indigenous Painting Handicraft
362 Norzod Stone crushing plant
363 NT Sound & Vision
364 Nyamro Fabrication
365 Bhutan Polymers Corporation Ltd.
366 Samphel Furniture House
367 Palabi Furniture
368 Kuenphen Norden Mining
369 NGN Technologies Pvt. Ltd.
370 K Norphel Enterprise
371 Khandum Furniture and Décor
372 Bhutan Observer Private Limited
373 Image Arts, Pants and Rubber Seal
374 Norphel Chocha Handicraft
375 Dezang Pezokhang
376 Excel Furniture and Home Furnishing
377 Godrej Furniture
378 KR Furniture
379 Bhutan Enterprise (Furniture)
380 BK Furniture
381 Druk Horticulture Private Limited
382 Kuenchap Bakery
383 Yiga Radio
384 Bumzang Fabric and Paper Unit
385 KMT Printing Press
386 Bhutan Agro Industrial Limited
387 Willy's Ice Cream
388 Nima Lotey Fiber Services
389 Sky Bakery
390 RSA private limited limestone unit
391 Quality Stone and Aggregate Factory
392 Manufacture of Glass fiber concrete
393 Kuenphen Wood Works and Fabrication
394 Interlocating Cement Earth Block
395 Karma Furniture house/Zobel Furniture
396 Mejir Handicraft
397 Highland wood
398 Loten Fabrication
399 Chunder Bakery
400 Dairy Milk Sale Counter
401 Bubu Bakery
402 DMT Bricks
403 Laki Zangmo handicraft
404 Dorji's Bakery
405 Y.B.M (concrete products)
406 Besogang Stone Quarry Private Limited
407 Ghasel Handicraft
408 Kabisa Dairy Products Outlet
409 The Gourmet Food House
410 White Tare Ceramics
411 Singye Stone and sand Factory
412 Taktsang Aggregate and sand company
413 Sonam Sawmill
414 Ngawang wood Works
415 Nortak Mines and Minerals
416 Druk Menjong Wood Industry
417 Tashi Lhendrup Furniture
418 Tshejor's Ayzey
419 Nado Poiokhang
420 Kinz Farm Mushrooms
421 Life Painting Demonstration
422 Yoedpame Studios
423 Army Welfare Sawmill
424 Central Café
425 Menjong Sorig Pharmacatrical
426 Big Bakery
427 Dhom Zang Wood Works
428 Samphel Furniture House
429 Zamling Arts and Rubber Stamps
430 The Druk Pizza
431 Rabten Wire Industry
432 Natsho Fabrication works
433 Gyeltshen Drezim Incense Unit
434 Bhutan Ferro Alloys Limited
435 Jigdrel Woodworks
436 Dechen Sawmill
437 Sonam Lhaden Yatha Tshongkhang
438 Samden Chuzing furniture House
439 Sangay Dorji Tailoring
440 CDCL Mining and Quarry
441 Dorji Tailoring
442 Roja Resturant and Bar
443 Puensum Bakery
444 Tashi Yangthang Tailoring
445 Choki Restaurant
446 Ratna Bakery
447 Sonam Pem Restaurant
448 Noryang Tailoring
449 Lhashoes Bakery
450 Khuenphen Poultry Farm
451 Natshe Furniture
452 Samdrup Shingkham Kunkhaup Incense
453 Lhendrup Furniture House
454 Gyelposhing Furniture House
455 KCT Blocks and Aggregate Supply

456	Norbu Sawmill
457	Quality furniture House
458	Norbu furniture/Showroom
459	Nida Karsum Hotel
460	Lhazang Mushroom
461	Thinley Choden Handicraft
462	Shangirila Bakery
463	Choden Sawmill
464	Echo Cement Whole Seller
465	Dungsam Cement Corporation
466	Dwazang
467	Penden Cement Authority Limited
468	Bhutan Fruit Product Pvt. Ltd.
469	Jigme Sawmill
470	State Mining Corporation Ltd.
471	ICE Beverages Private Limited
472	Tshering Stone and Aggregate Factory
473	Kuenphen Wang Pharmacy
474	Chheden Mill
475	Yangnor Beer Agency
476	Rewas Enterprise
477	Sonam Enterprise (Distributor)
478	KYT Photo Studio
479	Jai Prakash Grocery
480	DGM Geology and Mines
481	Norbuling Bakery
482	Samtse Poultry Corporative
483	Norbuling Poultry Farm
484	Sonam Pelzom Tailoring
485	Khamsum Wangdi Confectionery
486	Kden Darma Production
487	Tsong Tsong Ma Production
488	Tshering Meto Audio Visual
489	Choezang Motion Picture
490	Atsara Entertainment
491	Pelbarling Audio Visual
492	Yailoring
493	Lhazang Handicraft
494	Druk Handicraft
495	Shiva Modern Arts
496	Buddhist Art Gallery
497	Tashi Dagay Handicraft
498	Authentic Bhutanese Furniture
499	Norbu Handicraft
500	Kuensel Corporation
501	Om Tara Handi Craft
502	Pema Choden Furinture
503	Tshenda Confectionery Bakery
504	K.K Furniture
505	Jangchub Furniture
506	Chenga Dawa Sawmill & Furniture
507	Integrated Food Processing Plant
508	Rinchen Poultry Farm
509	Dharma Arts and Craft
510	RSA Pvt. Ltd.
511	Chundu Timber Industry
512	National seed Centre, MoAF
513	City Print
514	Printing Press
515	Norbu Dezang Incense Factory
516	Bhutan Concrete bricks
517	Bhutan School of Art and Music
518	Lamp Cement Agent
519	Gurung Flowers & Plants (Nursery)
520	Dargon Impex
521	Kinzang Choden Incense Making
522	Bakery
523	Manufacturing of Beer
524	Choden Cement Agency
525	Tashi Commercial Corporation
526	Ugyen Ferro Alloys Pvt Ltd
527	Lhamo Printing Press
528	Chimi Sawmill and Wood Industries
529	Quantity Gases Pvt. Ltd.
530	Kimpex Pvt. Ltd. (soap unit)
531	Tashi Carpet Factory
532	Propical Toppings
533	Zangpo Bakery
534	Dralha Flour Mill
535	Tashi Matha Factory
536	Tashi Tarpaulin Factory
537	Kingyal Coke & Chemicals Pvt. Ltd.
538	Bhutan salt Enterprises
539	Bhutan Indo Company Pvt. Ltd.
540	Jigme Saw Mill & Furniture
541	Drangchu Beverages Pvt. Ltd.
542	Bhutan Plastic Industry
543	Tashi Beverages Limited
544	Phuntsho Timber Industry
545	KMT Printing Press
546	Gognphel wood industries
547	Yangden Wood based Industry
548	Lakey Cable Network
549	Langchenphu Livestock Fishery
550	Tsheiring Steel Works
551	Barma Chemical Industry
552	Tashi Commercial Corporation
553	Pema Lhaden Sawmill
554	TD Metho Cable Service
555	Karma Furniture House
556	Himalayan Wooden Furniture House
557	Norphel Handicraft
558	Prayer Wheel Handicraft
559	Dorji Jeweleries Handicraft
560	Namsay Textile
561	Rinchen Furniture House
562	Chenzo Furniture House
563	Namgay Furniture House
564	Kay Tee Furniture
565	Ani Furniture House
566	Jigme Furniture
567	Jachung Bakery
568	Dechen Furniture House
569	Kuenga Sawmill and Furniture Unit
570	Jigdrel Handicraft
571	Bhutan Broadcasting Service
572	Gyeltshen Furniture House
573	Bhutan Communications Services
574	Kelven Furniture House
575	Sky Bakery
576	Green Manufacturing and Repairing
577	Buddhist
578	Bhutan Stone and Aggregate Factory
579	Rabten Sawmill
580	Asha Bakery
581	Ugyen's Silverlining Handicrafts
582	Choki Lhamo Tailoring
583	Traditional Boot House
584	Choe Cha Arts and Crafts
585	Art Café
586	Tashi Delek Handicraft
587	Art Shop Gallery
588	Norling Cable
589	Druk Orchid Nursery
590	Nono Furniture
591	Puensum Bakery
592	Green Print
593	Norbu Bakery
594	Yarkay Production
595	GSM Furniture and Fabrication
596	Ongdi Timber Industries
597	KNG Fabrication
598	Bhutan Concrete Bricks
599	The Green Road
600	Wood Craft Centre Ltd.
601	Gagyel Lhundrup Weaving Center
602	Bumthang Fabrication Work
603	JK Furniture
604	Ugyen Om Sawmill
605	Lhacham Mineral Industry
606	Lhaki Cement
607	Kenpa Pvt. Ltd.
608	Passang Tara Wood & Woods
609	Rinpung Sawmill
610	Chencho Dema Furniture House
611	Karma Dema Furniture House
612	Lhamo Choden Furniture Unit
613	Zangmo Furniture House
614	Chencho Handicraft
615	Wangchuk Wood Tech Unit
616	National Women's Association of Bhutan
617	Bhutan Film Association
618	Swiss Bakery
619	Lhaki Steels and Rolling Pvt. Ltd.
620	Bhutan Metals Pvt. Ltd.
621	Staples and Jattu Wood Industry
622	Druk Cement
623	Zimdra Food Pvt. Ltd.
624	Sampheling Meday Bja Nyamrub Detshan
625	Druk Ferro Alloys Limited
626	Food Corporation of Bhutan
627	Bhutan Furniture and Steel Furniture
628	KTM Bakery
629	Mil Processing Unit
630	Pema Mobile Sawmill
631	Bumthang Brewery
632	Udee Enterprises
633	Sonam Woodworks
634	Weaving Centre
635	Raven Furniture House
636	A & Di Furniture
637	Bhutan Media and Communi-cations
638	Druk Men-Wang Fabric Unit
639	Om Bakary
640	Bhutan Wood & Panel Industries
641	Bhutan packaging industry
642	Karma Steel and Wood Industry
643	SD Eastern Bhutan Forro Silicons Ltd.
644	Druk Plaster & Chemicals Ltd
645	Geyzor Poultry Fram
646	SD Eastern Bhutan Load Co. Ltd.
647	Pema Bekery
648	Kuenchap Wood Based Industry
649	Tashi Phuntsho Furniture House
650	M/S Karma Zokhang
651	Sonam Bricks Manufacturing
652	Gaylek Palter Furniture House
653	Tshering Steel Works
654	Pema Tyres
655	Thinley Pelber Printer Press
656	Chodak Trading & Tyres
657	S.T Bakary
658	Bhutan Sweet & Snacks Bakary
659	Mountain Fresh Private Limited
660	Army Welfare Project Ltd.
661	Karten Oil Mill
662	Druk Green Power Corporation Limited
663	Bhutan Polythene Co. Ltd.
664	Thangtong Iron & Steel Production
665	Ation Bitunem Enulision Manufacturing
666	Bhutan PLY
667	Tyre Zone
668	SDEBFS (P) Ltd.
669	Tashi Lngchi Trokhang
670	Druk Satair Corporation Ltd.
671	Bhutan Oil Corporation
672	Bhutan Power Corporation
673	Demcha Supplier & Distributer
674	Tashi Group of Agent
675	Damchen Agencies
676	Gelephu Bakery
677	Kuendey Printing Press
678	Kuengacholing Poezokhang
679	Kuengacholing Cement Concrete Brick
680	Berverage Production
681	Bhutan Oil Corporation
682	Kunjung IT & Innovation
683	Bhutan Power Corporation
684	Tashi Commercial Corporation
685	DPCL, (Tashi Commercial Cooperation)
686	Samdrup Sawmill
687	Bhutan Bakery
688	Yangjung Sonam Bricks & Steel Fab. Ent.
689	Gyaltshen Wood Industries
690	Gyaltshen Furniture House
691	Karma Cement Agent
692	Booster Printing Press
693	Dungsum Polymers Ltd.
694	Food Processing Unit
695	Druk Photo Lab
696	Agro Production (Bhukari)

697 Namsel Handicraft
698 P.D Production
699 Piggery Farm
700 Phuensum Entertainment
701 Sangay Bakery
702 Sangay Arts and Crafts
703 Samden Sand and Stone Quarry
704 Samphel Workshop/Fabrication
705 Samba Auto Workshop
706 Bhutan Hydropower Services Ltd.
707 Neetshel Pvt. Ltd.
708 Nephu Handicraft
709 Ngawang Dapa
710 Ngawang Furniture House
711 Ngawang Sonam Lhundup /Work-shopFabrication, Mongar
712 Ngawang Tenzin Potato Chips
713 Nidup Pemo Dairy Farm, Gangzur
714 Nidup Zangpo Dapa
715 Nima Chozey Khang Handicraft
716 Nima Desho Production
717 Nima Karma Dapa
718 Nima Yosel Presents
719 Niwong Piggery Farm
720 Norbu Dapa
721 Norbu Wangdi Dapa
722 Norbu Wangdi Piggery Farm
723 Norgay Fabrication
724 Norgay Bakery, Duksum
725 Norlha Indigenous Painting Handicraft
726 Norzod Stone crushing plant
727 NT Sound & Vision
728 Nyamro Fabrication
729 Bhutan Polymers Corporation Ltd.
730 Samphel Furniture House
731 Palabi Furniture
732 Kuenphen Norden Mining
733 NGN Technologies Pvt. Ltd.
734 K Norphel Enterprise
735 Khandum Furniture and Décor
736 Bhutan Observer Private Limited
737 Image Arts, Pants and Rubber Seal
738 Norphel Chocha Handicraft
739 Dezang Pezokhang
740 Excel Furniture and Home Furnishing
741 Godrej Furniture
742 KR Furniture
743 Bhutan Enterprise (Furniture)
744 BK Furniture
745 Druk Hoticulture Private Limited
746 Kuenchap Bakery
747 Yiga Radio
748 Bumzang Fabric and Paper Unit
749 KMT Printing Press
750 Bhutan Agro Industrial Limited
751 Willy's Ice Cream
752 Nima Lotey Fiber Services
753 Sky Bakery
754 RSA Private Limited Limestone Unit
755 Quality Stone and Aggregate Factory
756 Manufacture of Glass Fiber Concrete
757 Kuenphen Wood Works and Fabrication
758 Interlocating Cement Earth Block
759 Karma Furniture house/Zobel Furniture
760 Mejir Handicraft
761 Highland wood
762 Loten Fabrication
763 Chunder Bakery
764 Dairy Milk Sale Counter
765 Bubu Bakery
766 DMT Bricks
767 Laki Zangmo Handicraft
768 Dorji's Bakery
769 Y.B.M (concrete products)
770 Besogang Stone quarry Private Limited
771 Ghasel Handicraft
772 Kabisa Dairy Products Outlet
773 The Gourmet Food House
774 White Tare Ceramics
775 Singye Stone and sand Factory
776 Taktsang Aggregate and Sand Company
777 Sonam Sawmill
778 Ngawang Wood Works
779 Nortak Mines and Minerals
780 Druk Menjong Wood Industry
781 Tashi Lhendrup Furniture
782 Tshejor's Ayzey
783 Nado poiokhang
784 Kinz Farm Mushrooms
785 Life Painting Demonstration
786 Yoedpame Studios
787 Army Welfare Sawmill
788 Central Café
789 Menjong Sorig Pharmaceutical
790 Big Bakery
791 Dhom Zang Wood Works
792 Samphel Furniture House
793 Zamling Arts and Rubber Stamps
794 The Druk Pizza
795 Rabten Wire Industry
796 Natsho Fabrication Works
797 Gyeltshen Drezim Incense Unit
798 Bhutan Ferro Alloys Limited
799 Jigdrel Woodworks
800 Dechen Sawmill
801 Sonam Lhaden Yatha Tshongkhang
802 Samden Chuzing Furniture House
803 Sangay Dorji Tailoring
804 CDCL Mining and Quarry
805 Dorji Tailoring
806 Roja Restaurant and Bar
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808 Tashi Yangthang Tailoring
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