

# Education Insights

## BANGLADESH

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INTERNATIONAL  
EDUCATION  
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# ABOUT THIS REPORT

This report is designed to equip UK education institutions with the data and analysis to drive successful engagement and student recruitment strategies. Using the latest data from the most reliable sources, this market brief represents a window onto Bangladesh's student recruitment market, as well as the economic, demographic and policy factors that shape the country's higher education sector.

If you have further questions about this market or our other global services, please contact us at [insightsandconsultancy@britishcouncil.org](mailto:insightsandconsultancy@britishcouncil.org).

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# INTRODUCTION

Over the past two decades, Bangladesh has ranked among the fastest growing economies in the world, making huge strides in improving quality of life for its citizens. Its development has been primarily driven by the country's rise in garment manufacturing, with Bangladesh now placed second in the world in terms of annual apparel exports by value. Though it trails distantly behind China, it is rapidly gaining ground in the textiles sector as Chinese labour costs skyrocket. Bangladesh, meanwhile, has one of the lowest minimum wages in the world. This creates opportunities and challenges for the future, as Bangladesh seeks to balance between seizing the moment to follow China up the 'manufacturing escalator' with a pressing need to address working conditions and social unrest.

Even as Bangladesh continues to expand its role in low-cost manufacturing, the country has a growing demand for highly-skilled workers, as well as the education pathways to develop them. The number of students enrolled in tertiary education in Bangladesh has increased by a staggering 1 million since 2010. With a severe shortage of HE places available domestically, and universities frequently disrupted by political and social unrest, study abroad has more than doubled over the past five years. Malaysia remains by far the top destination for Bangladeshi students, owing to its relatively open visa policies and low tuition fees. The US, Australia and Canada have captured most of the remaining growth in outbound study – all have seen enrolments rise by over 50 per cent in the past five years of reported data.

Meanwhile, the UK has struggled to capitalize on the growing overseas study trend, with enrolments falling by half over the same time frame. Only three UK HE institutions had more than 100 Bangladesh-domiciled enrolments in 2016/17, down from 10 just five years earlier. Removal of the post study work visa and more stringent visa vetting are mainly to blame. The market could now be turning a corner, however, with UK study visa rising by 40 per cent between 2016 and 2018.

In the medium-term, Bangladesh will remain a price-sensitive market. The choice of study destination will be influenced by tuition fees, availability of scholarships, post study work options and overseas family networks that can help alleviate costs. Nevertheless, demand for study abroad will continue to increase, supported by a strong economy, a lack of capacity in domestic universities, few transnational education (TNE) opportunities in-country and requirements to up-skill the labour force as the economy continues to industrialise. Overall, it appears to be a favourable time for UK institutions to re-engage with Bangladesh and to think creatively about how to capture the significant opportunity on offer over the next few years.

# EXECUTIVE SUMMARY: BANGLADESH AT GLANCE

## Economic Environment



- Over the past two decades Bangladesh has ranked among the fastest growing economies in the developing world, recording stellar annual average GDP growth of 6 per cent. Economic growth rose to 7.9 per cent in 2018 – supported by remittances from an estimated 7.5 million Bangladeshi's living abroad – and is expected to remain robust over the medium term.
- Huge strides have been made in recent years across a range of socio-economic indicators, including: reduction in the poverty rate; decline in maternal and child mortality; increase in life expectancy; and higher participation in education, including achieving gender parity at primary and lower secondary level.
- The backbone of the industrial sector is the production of ready-made garments, with textiles representing 80 per cent of the total exports and 20 per cent of GDP. However, poor infrastructure (including electricity supply) is a barrier to growth and foreign investment in the sector. While agriculture accounted for 15 per cent of GDP in 2017, nearly half of Bangladeshis were employed in agriculture, mostly in rice production.
- The currency in Bangladesh is the Bangladeshi taka (BDT) and the central bank operates a managed float exchange regime. Due to a persistent current account deficit (i.e. the value of imports exceeds the value of exports) the taka is likely to continue to weaken against most major currencies in 2019.
- The minimum wage for Bangladeshi garment workers was increased by 51 per cent in December 2018 to taka BDT8,000 (US\$95) per month. However, apparel workers in Bangladesh are still among the lowest paid by global standards.

## Political Environment



- The Peoples Republic of Bangladesh follows a parliamentary democratic model. The Awami League (AL) party won a third consecutive term in parliament at the December 2018 election; however, the election results were disputed by the main opposition party, citing polling irregularities.
- International engagement with China will continue to deepen, given the rising number of Chinese-backed infrastructure projects. Additionally, Bangladesh maintains strong relations with India, Saudi Arabia and the UAE, as many Bangladeshis work in these countries.
- Bangladesh experiences frequent bouts of social unrest, including protests over low wages, unsafe working conditions, and road safety. In recent years, local Islamist groups have carried out a number of terrorist attacks, though statistics gathered by the Global Terrorism Database show a substantial decline in reports of terrorism incidents since 2015.<sup>1</sup>

<sup>1</sup> National Consortium for the Study of Terrorism and Responses to Terrorism (START), Global Terrorism Database (2018). Retrieved from <https://www.start.umd.edu/gtd>.

- A brutal crackdown by the Myanmar armed forces has driven around 720,000 Rohingya refugees into Bangladesh since August 2017. It is unlikely that the refugees' planned repatriation will be completed anytime soon.

## Education Priorities



- The Strategic Plan for Higher Education in Bangladesh (2017-2030) proposes the creation of a National Research Council, increasing the research capacity of the country, and awarding competitive research grants. The plan expects the share of spending on the education sector to increase from 2 per cent of GDP in 2016 to 3 per cent by 2021 and 6 percent by 2030.
- The Seventh Five Year Plan (2016-2020) included a target to increase higher education enrolment rate to 20 per cent by 2020 (it reached 17.6 per cent in 2017), placed increased emphasis on research and training via the Bangladesh Research Network, and planned to establish an accreditation council.
- Key challenges identified in the higher education sector include: poor infrastructure; low female participation at the tertiary level (14.5 per cent versus 20.6 per cent for males); too few science, technology and applied subjects; and intense competition for the limited seats in public universities.
- The Bangladesh government has committed to meeting the United Nations Sustainable Development Goals: Agenda 2030, which includes a goal to "ensure inclusive and equitable quality education and promote lifelong learning opportunities for all".

## Country Risks



- While Bangladesh is vulnerable to issues affecting global trade (including financial market developments, escalating trade protectionism, and heightened geopolitical tensions), the downside risks are predominantly domestic.
- Poor infrastructure (including electricity supply), a shortage of key skills in technical fields, ICT gaps and requirements to adopt new technologies to cope with higher quality and safety standards all represent threats to continued economic growth. Aid from bilateral and multilateral donors will remain critical to improving infrastructure and reducing poverty.
- The economic, social and environmental impacts of the Rohingya refugee crisis could become significant if repatriation does not proceed as swiftly as planned. While external financial assistance has thus far been generous, donor support could wane over time.
- Underlying political tensions remain and the risks from political and social unrest could increase. The potential threat of terrorism also continues to be a source of concern.

## Outbound Study Trend



- UNESCO reports that 55,787 Bangladeshi students were studying abroad in 2017, over double the amount in 2012. Malaysia is by far the most popular student destination, followed by the US, Australia, UK and Canada.
- While overseas education is in high demand and fuelled by an expanding middle class, it remains unaffordable for the vast majority of Bangladeshis.
- New destinations such as Germany and China are becoming more popular, owing to lower study costs and scholarship / funding supports on offer.

## UK Recruitment



- In the South Asia region, Bangladesh is the third largest recruitment market for the UK, behind India and Pakistan.
- In 2017/18, 2,345 students from Bangladesh were enrolled in higher education institutions in the UK, a 53 per cent drop on 2014.
- The collapse of UK enrolments from Bangladesh is generally attributed to the introduction of the Points Based System in 2009 and the repeal of the post-study work visa category in 2012. The heightened risk of student visa refusals has caused some UK universities to shift focus elsewhere.

## Student Supply



- With 2.2 million students enrolled at tertiary level, Bangladesh has a large and rapidly expanding student population. It is likely that the number of students travelling abroad to study will double again over the next five years.
- Female participation in higher education has grown significantly, and the proportion of female Bangladeshi students in the UK increased from 20 per cent in 2010 to 30 per cent in 2016/17.
- Demographics provide only a loose guide to the prospects for recruitment of students from Bangladesh, given limited affordability for study abroad. In 2017/18, the UK recruited more students from Qatar (with a population of just 2.6 million) than from Bangladesh (with a population of 165 million).

## Study Level and Subject Areas



- 64 per cent of students from Bangladesh in the UK in 2016/17 were pursuing postgraduate programmes; the majority of these (70 per cent) on taught master's programmes. However, 58 per cent of new enrolments on Computer Science programmes were studying at the undergraduate level.
- Business & Administration is by far the most popular subject for students from Bangladesh in the UK, although new enrolments fell by 35 per cent in 2016/17. Law and Engineering are also popular, with the new enrolments for the latter registering a slight increase in 2016/17, despite overall student numbers from Bangladesh falling by 20 per cent.

## Scholarships



- As a developing country, Bangladeshi students are eligible to apply for a wide range of scholarships, including Fulbright, Chevening, Commonwealth, Australia Award and DAAD scholarships, as well as scholarships from national governments, such as those of China, Japan and India.

## Drivers of Student Mobility



- Intense competition for places in local public universities makes study abroad an attractive alternative option for those who can afford it.
- Limited TNE options in-country makes study abroad necessary for many students interested in gaining an international qualification.
- As a developing country, the availability of international funding sources – such as scholarships, grants and tuition fee waivers – has a major influence on the choice of international study destination.
- Many Bangladeshis view study abroad and subsequently working abroad as interlinked. Therefore, accommodative visa and post study work policies are a major driver of mobility to the top destinations. Existence of family networks also plays a large role.



## Recruitment Channels



- Newspaper readership in Bangladesh is high, driven by rising literacy rates and digital newspapers. The top English-medium paper is *The Daily Star*.
- Facebook dominates the social media landscape, accounting for 93 per cent of the market in 2018, with most people accessing the internet on their phone.
- Student recruitment fairs run frequently in Dhaka (to a lesser extent in other cities), organised by national education bodies from the UK, Australia, Canada and New Zealand, as well as numerous agents operating in the country.

## Barriers to Student Mobility



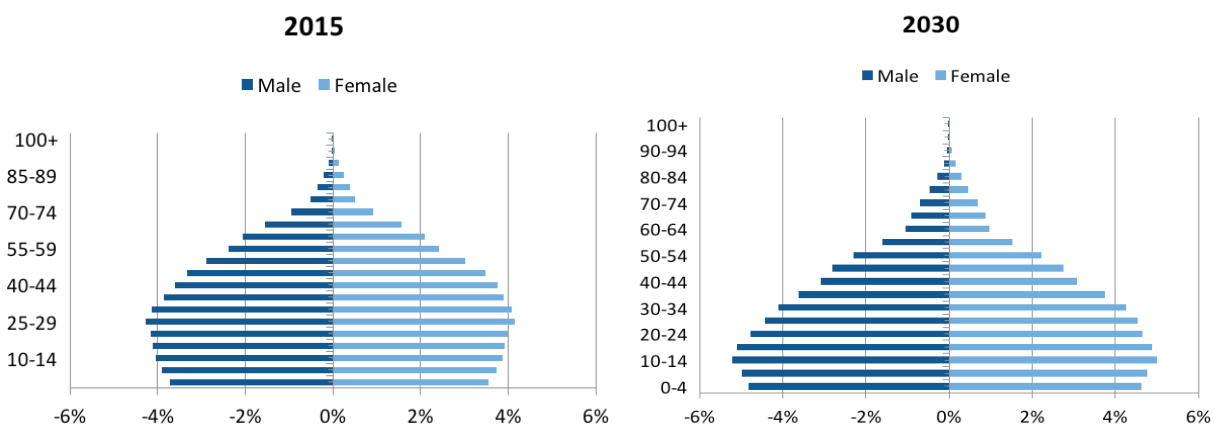
- As a 'lower middle-income' country, with a GDP per capita of US\$1,516 in 2017, affordability will remain a key barrier to student mobility.
- Many countries don't accept the Bangladesh Higher Secondary Certificate (HSC) as eligible for gaining access to their higher education institutions. Further qualifications such as GCE A-levels or foundation courses are generally required for study in the UK.
- English language competency is low amongst the broad student population.

# DEMOGRAPHICS

Population size and growth rate are based on estimates, owing to the lack of reliable census data. In 2017 the World Bank estimated the population at 165 million, making Bangladesh the world’s eighth most populous nation.<sup>2</sup> This figure is forecast to rise to 170 million by 2020 and could exceed 200 million within the next 30 years.<sup>3</sup> Bangladesh has a comparatively small landmass, meaning that population density is very high at over 1,200 people per square kilometre in 2015.<sup>3</sup> As a result, many people are landless and forced to live on and cultivate flood-prone land, while falling water tables cause intermittent water shortages in the northern and central parts of the country. Bangladesh is among the most exposed countries to climate change worldwide. A three-foot rise in sea level would flood almost 20 per cent of Bangladesh and displace more than 30 million people.<sup>4</sup>

In 2016, 35 per cent of the population lived in urban areas; up from 24 per cent in 2000.<sup>1</sup> As the world’s most densely populated country (excluding small-population countries and city states), Bangladesh faces significant infrastructural challenges as it urbanises and industrialises, as well as the challenges posed by its low-lying land and vulnerability to natural disasters. Rural–urban migration is happening at a rapid pace, resulting in unplanned urban development and the creation of slums lacking basic healthcare and infrastructure. The capital, Dhaka, is one of the world’s largest and fastest-growing cities. The World Bank reports that Bangladesh’s hope of achieving middle-income status rests on how it develops its urban spaces. The government’s current Five-Year Plan (2016-2020) aims to ensure access to water for all urban dwellers, and to expand coverage of the urban drainage system to 80 per cent. The three most populous cities in Bangladesh are Dhaka (26 million), Chittagong (15 million) and Rajshahi (6 million).<sup>5</sup>

**Figure 1 Bangladesh’s Population Pyramid, 2015 and 2030**



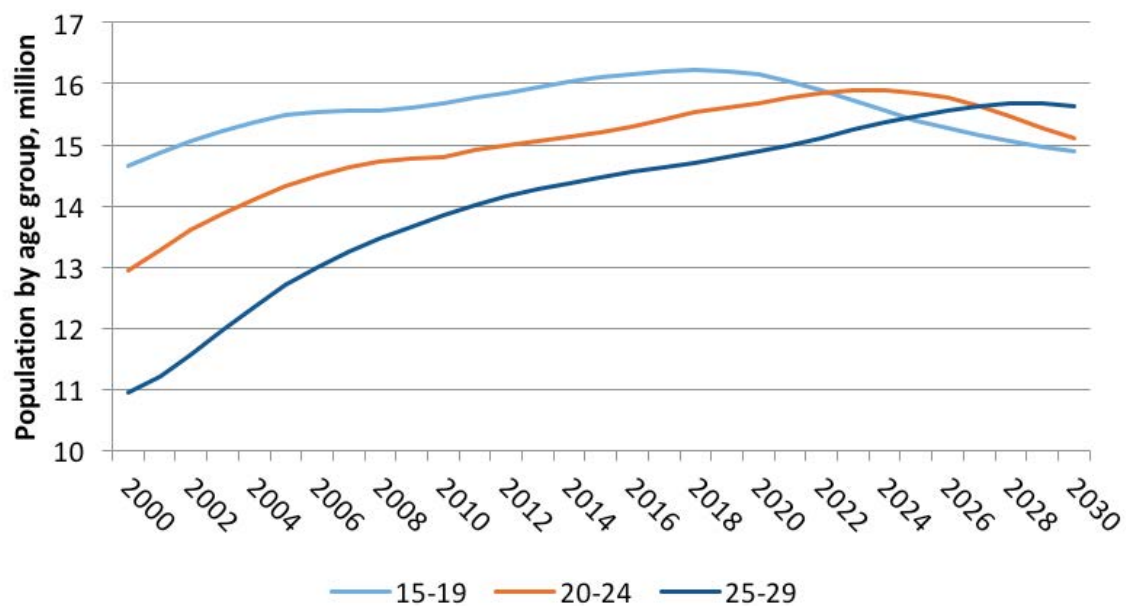
Source: UN Population Division

<sup>2</sup> World Bank Data Bank  
<sup>3</sup> UN World Population Prospects World Population Prospects 2017  
<sup>4</sup> Scientific American, 21 April 2017 *The Unfolding Tragedy of Climate Change in Bangladesh*  
<sup>5</sup> Bangladesh Bureau of Statistics, Ministry of Planning Population and Housing Census 2011

Bangladesh's fertility rate has fallen from 4.0 children per woman in the mid 90's to 2.1 in 2015, which is below the global average of 2.5. The decrease in fertility is partly attributed to higher female participation in secondary and tertiary education, which provides women with greater decision-making power, including deciding to marry later. Also, improved maternal and child healthcare and a fall in child mortality rates have encouraged parents to opt for smaller families.<sup>6</sup> The declining fertility rate has resulted in annual population growth slowing from 2.7 per cent in the 1980s to 1 per cent per cent in recent years.

Bangladesh has a relatively young population with a median age of 26 years in 2015, compared with 27 in India and a global average of 30. The UN projects Bangladesh's median age to increase to 32 by 2030, as illustrated by the upward shift in the structure of the population pyramid in Figure 1.

**Figure 2 Bangladesh's Student Age Population**



Source: UN Population Division

The declining fertility rate has resulted in the proportion of the population aged 0-14 falling from 37 per cent in 2000 to 29 per cent in 2015. As can be seen in Figure 2, the absolute number of 15-19 year olds is already estimated to have peaked, whereas the 20-29 age segment is due to peak within the next 5-10 years.

Demographics provide only a very loose guide to the prospects for recruitment of students from Bangladesh, given that such a small proportion of the student population can afford to study abroad. On balance, the prospective market for recruitment of international students is expected to grow, primarily due to economic rather than demographic considerations.

<sup>6</sup> D+C Development and Cooperation, 16 June 2018, "[How Bangladesh reduced the average number of children per woman](#)"

The ongoing transition from a largely rural agricultural society with high fertility and mortality rates to a mainly urban industrial society, with low fertility and mortality rates, presents an opportunity for Bangladesh known as the 'democratic dividend'. At an early stage of this transition, fertility rates fall, leading to fewer young mouths to feed. During this period, the labour force temporarily grows more rapidly than the population dependent on it, freeing up resources for investment in economic development and family welfare. However, a key challenge relates to the country's need to ensure a large, educated and skilled workforce that will fully capture this potential.

Bangladesh's population is composed largely of ethnic Bengalis, with smaller proportions of tribal groups and regional migrants, including an influx of Burmese Rohingya refugees fleeing human rights abuses in Myanmar since mid 2017. At the last census in 2011, 90 per cent of the population was Sunni Muslim, making Bangladesh home to one of the world's largest Muslim populations; 9 per cent of the population is Hindu, with a small number of Buddhists and Christians.<sup>7</sup> Secularism is one of the four pillars of the constitution, although religious legal systems exist and religious extremism is a concern. The main language is Bengali, followed by English, while minority ethnic languages, including Urdu, are often predominant in border areas.

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<sup>7</sup> Bangladesh Bureau of Statistics *Population and Housing*.

# ECONOMICS

Over the past two decades Bangladesh has ranked among the fastest growing economies in the world, recording annual average GDP growth of 6 per cent. Economic growth amounted to 7.9 per cent in 2018 supported by remittances from the estimated 7.5 million Bangladeshi's living abroad, garment exports, increased wages and low inflation.<sup>8</sup> Continued growth is expected given macroeconomic stability along with credit growth and increased private investment. According to the World Bank, GDP per capita was US\$1,516 in 2017, which lags behind neighbouring Pakistan (US\$1,547) and India (US\$1,939), but Bangladesh is gaining ground on both.<sup>9</sup>

Bangladesh graduated to 'lower-middle-income'<sup>10</sup> status in 2015 and the government's current five-year plan (2016–2020) aims for Bangladesh to reach 'middle-income' level by 2021, the year that marks the 50<sup>th</sup> anniversary of Bangladesh's independence. Along with reducing the poverty rate in half since 2000 (from 48 per cent to 24 per cent of the population below the poverty line), other social-economic indicators like gender disparity in education and maternal mortality have also been significantly improved. Since 1990, life expectancy has risen by 14 years to 72 and the infant mortality rate has been halved. Notwithstanding all this progress, Bangladesh remains a poor and overpopulated country.

Bangladesh's transformation has involved diversification away from an agrarian to a more manufacturing-based economy. The backbone of the industrial sector is the production of ready-made garments, with textile exports representing 80 per cent of the total exports and 20 per cent of GDP. There are about 2 million workers in the garment industry (most of them women) and another 15 million depend indirectly on the industry.<sup>11</sup> Leveraging its low-cost labour, Bangladesh is set to rival, and potentially overtake China in the ready-made garment market. However, poor infrastructure, including electricity supply, is a barrier to growth and foreign investment in the sector, which has also experienced a series of fatal factory accidents and crippling strikes over poor pay and working conditions.

The government is attempting to diversify its economy and has identified key target areas, including: garment design, production, ICT and business services; pharmaceuticals and life sciences; and agribusiness and leather products. While agriculture accounted for 15 per cent of GDP in 2017, nearly half of Bangladeshis were employed in agriculture, mostly in rice production, but also tea, jute, wheat, sugarcane and tobacco.<sup>7</sup>

The minimum monthly wage for Bangladeshi garment workers was increased by 51 per cent to BDT8,000 (approximately US\$95) in December 2018.<sup>12</sup> The last time garment workers' salaries were raised was in 2013, immediately following the Rana Plaza disaster, in which an industrial building housing several garment factories collapsed, killing more than 1,130 workers. However, apparel workers in Bangladesh are still the lowest paid by global standards, according to a survey conducted by the Japan External Trade Organization in March 2018 which found that average monthly wages in Bangladesh are just \$101, compared with \$135 in Myanmar, \$170 in Cambodia, \$234 in Vietnam and \$518 in China.<sup>13</sup>

Tax revenues in Bangladesh are currently low at 9 per cent of GDP — the average for non-resource rich, low-income countries is around 15 per cent. This reflects the high proportion of the workforce engaged in the informal economy.

<sup>8</sup> Nordea Trade, December 2018, [The Economic Context of Bangladesh](#).

<sup>9</sup> World Bank Data Bank.

<sup>10</sup> Lower middle-income economies are those with an income per capita between \$1,026 and \$4,035, as measured by the World Bank. [New country classifications by income level](#).

<sup>11</sup> Euromonitor, Bangladesh Country Report, December 2018.

<sup>12</sup> Fashion United UK, 14 September 2018, [Bangladesh raises minimum wages for garment workers](#).

<sup>13</sup> Dhaka Tribune, 12 November 2018, [Apparel workers in Bangladesh still the lowest paid by global standards](#).

According to data reported in local media in 2016, 77 per cent of the total urban labour force is employed in the informal sector and 60 per cent of those live in slum and squatter settlements.<sup>14</sup>

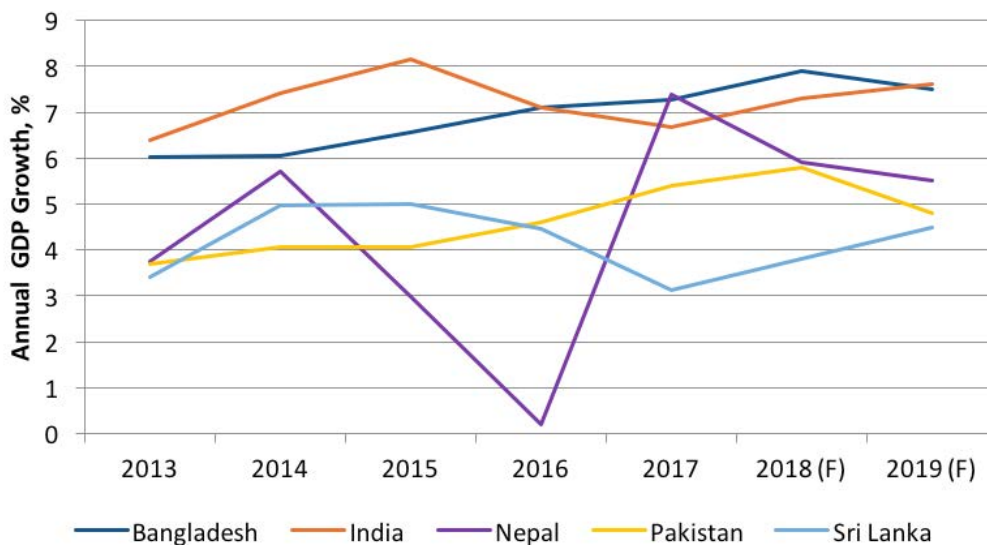
2018 budget gave priority to the development of education, technology, transport, communication and defence. Almost 14 per cent of the annual budget is dedicated to education, although such spending is still below UNICEF recommendations of 20 per cent.

Bangladesh has been a pioneer in financial inclusion. The introduction of microfinance, mobile financial services, and agent-based banking are notable initiatives. The authorities also promote lending for small and medium-sized enterprises and female entrepreneurs, and require that banks open at least 50 percent of their branches in rural areas. However, the banking sector is weak and profitability is declining. The existence of several state-owned commercial banks (which account for over 30 per cent of all banking assets) undermines efficiency.<sup>10</sup>

According to the World Bank, Bangladesh needs to create more and better jobs by boosting private investment, diversifying exports and building human capital. The country also needs to make doing business easier, complete its mega-projects on a fast track, improve financial sector governance and ensure a reliable supply of electricity.<sup>15</sup> Indeed much progress has been made in recent years, with access to electricity increasing from 47 per cent of the population in 2009 to 80 per cent in 2017.

As a developing country, Bangladesh is a major recipient of development assistance from multilateral agencies such as the World Bank and Asian Development Bank, as well as national agencies in Japan, US, Germany and the UK. Bangladesh mainly utilises foreign aid to build its infrastructure and cut poverty.<sup>16</sup>

**Figure 3: Economic Growth: South Asia Countries**



Source: Asian Development Bank<sup>17</sup>

<sup>14</sup> *The Daily Star*, 25 September 2016 *A major shift in household income survey.*  
<sup>15</sup> *The World Bank*, 2 October 2018 *Economic reforms can make Bangladesh grow faster.*  
<sup>16</sup> *The Financial Express*, 13 July 2018 *FY '18 foreign aid flow up by 66%.*  
<sup>17</sup> *Asian Development Bank, 2018 Bangladesh Economy.*  
 Market Intelligence Brief: Bangladesh

As illustrated in Figure 3, economic growth in Bangladesh has outpaced, and been more consistent than, its neighbours in recent years. Economic forecasters are optimistic of continued growth, with Euromonitor and EIU forecasting annual average growth of 7 per cent and 7.7 per cent, respectively, over the medium term.

Consumer price inflation has fallen from 10 per cent in 2011 to 5.6 per cent in 2018. Bangladesh's rising income levels could fuel inflation in 2019, driven by an increase in the minimum wage in the garment sector and an increase in consumer spending. However, the EIU expects consumer prices to increase by 5.4 per cent on average in 2019 and 2020.

The currency of Bangladesh is the taka and the central bank operates a managed float exchange regime. Exchange rates against the taka have a big impact on the value of remittances from overseas workers. The taka is likely to continue to weaken against most major currencies in 2019 owing to a persistent deficit on the current account. The EIU expects the taka to dollar exchange rate to average BDT85 in 2019, a slight appreciation from BDT84 the previous year.

Bangladesh ranks 103 (out of 140 countries) in the World Economic Forum's (WEF) 2018 Global Competitiveness Index,<sup>18</sup> scoring relatively high on 'market size' and 'macroeconomic stability', but low on 'property rights' and 'openness to trade'. In the World Bank's 2018 'Ease of Doing Business' report,<sup>19</sup> Bangladesh is ranked 176 (out of 190 economies), scoring second lowest of all countries on 'enforcing contracts', which measures the time and cost for resolving commercial disputes.

<sup>18</sup> World Economic Forum, 2018 *The Global Competitiveness Report 2018*.

<sup>19</sup> World Bank (2018) *Doing Business 2018*.

# POLITICS & POLICY

**The Peoples Republic of Bangladesh follows a parliamentary democratic model with the President as a mainly ceremonial head of state and executive power vested in the Prime Minister. The current prime minister, Sheikh Hasina Wazed, is the country's longest serving prime minister since independence in 1971 (having held the office since January 2009), and is also the country's second female prime minister. The Economist Intelligence Unit ranked Bangladesh 88 (out of 167 countries) in its 2018 Democracy Index, classifying it as a 'hybrid regime', which is somewhere between an 'authoritarian regime' and a 'flawed democracy'.<sup>20</sup>**

Bangladesh is governed by a 350-member parliament (House of Nations) elected for a five-year term. Three hundred of its members are directly elected and 50 seats are reserved for female nominees by political parties. The Awami League (AL) party won a third consecutive term in parliament at the December 2018 election and the election results were disputed by the main opposition party (Bangladesh Nationalist Party), citing concerns regarding election irregularities. Protests by the opposition challenging the legitimacy of the government are expected to continue but are unlikely to pose a risk to the AL's tight grip on power. Relations between the two parties are poor and the political system remains confrontational and highly centralised. Democratic institutions, including Parliament and local government, are generally considered to be weak.

In terms of international relations, Bangladesh will continue to centre its attention on India and China. While ties with India will remain strong, the issue of illegal migration from Bangladesh is an increasing source of friction. Economic engagement with China will continue to deepen, given the rising number of Chinese-backed infrastructure projects in Bangladesh. According to the EIU, China is already Bangladesh's largest source of imports and its main supplier of military equipment.<sup>21</sup> Relations with Myanmar will remain tense in the medium term owing to the Rohingya refugee crisis. Additionally, Bangladesh maintains strong relations with countries in the Middle East, particularly Saudi Arabia and the UAE, as these countries are major employers of Bangladeshis working outside the country.

In recent years, Bangladesh has experienced a number of terrorist attacks conducted by radical local Islamist organizations targeting religious minorities, secularist writers and bloggers and LGBT rights activists. The most serious incident occurred in July 2016, when five militants opened fire in a bakery, killing 29 people. Since then, the security forces have been largely successful in thwarting attempts. However, the UK Foreign Office warns that "terrorists are very likely to try to carry out attacks in Bangladesh", citing the most recent attack as having occurred in June 2018.<sup>22</sup> The risk remains that terrorists could target important landmarks and areas where foreign nationals are known to gather in an effort to undermine the government's control over national security.

A brutal crackdown by the Myanmar armed forces has driven around 720,000 Rohingya refugees into Bangladesh since August 2017. The Rohingya people are a stateless Indo-Aryan ethnic group often described as the world's most persecuted minority. There were an estimated 1 million Rohingya living in Myanmar before the crisis. It is unlikely that the refugees' planned repatriation will be completed anytime soon, as the scheme will be hindered by Myanmar's stringent

<sup>20</sup> EIU Democracy index 2018 "A hybrid regime is one where irregularities exist in elections preventing them from being fair and free...commonly have governments that apply pressure on political opponents, non independent judiciaries, and have widespread corruption, harassment and pressure placed on the media".

<sup>21</sup> EIU Bangladesh Country Report, January 2019.

<sup>22</sup> Foreign and Commonwealth Office [Foreign travel advice: Bangladesh](#).



verification process for re-entry and the refugees' unwillingness to return there, as security measures to protect the community remain poor.

Bangladesh experiences frequent bouts of social unrest, which are expected to continue throughout 2019 and 2020. In January 2019, workers in the garment sector held large-scale protests over low wages, as despite an increase in December, Bangladesh still has one of the lowest minimum wages in the world. In July 2018 students staged widespread protests in the capital, Dhaka, over road safety, which resulted in authorities taking forceful measures to restore order. Issues such as these will likely remain a feature of the political landscape in Bangladesh.

## Main Education Policy Agencies

The Ministry of Education has the overall responsibility for formulating policy, strategic leadership and preparing the national budget for public funding in higher education. The University Grants Commission (UGC) is the regulatory body for both public and private universities. An expansionist approach has been followed, particularly in the sphere of degree colleges under the National University and in approving the charters for private universities.

Between 2009 and 2018, the UGC implemented the Higher Education Quality Enhancement Project (HEQEP) which was jointly funded by the World Bank as a total cost of US\$91.5 million.<sup>23</sup> The main objective of the project was to improve the quality and relevance of the teaching and research environment in higher education institutions through encouraging both innovation and accountability within universities and by enhancing the technical and institutional capacity of the higher education sector.

The Directorate of Technical Education (DTE) and the Bangladesh Technical Education Board (BTEB) oversee vocational and technical education (VTE) provided by both public and private institutions. Private sector institutions are increasing, especially in the IT sector and in response to opportunity for work abroad as skilled and semi-skilled workers. Under the National Skills Development Policy 2011, National Technical and Vocational Qualifications Framework (NTVQF) has been designed to improve the quality and consistency of nationally recognized qualifications. The NTVQF is also intended to provide a new benchmark for the international recognition of the skills of Bangladeshi workers, who are recognized as an increasingly important export.

## Education Related Policies

### Strategic Plan for Higher Education in Bangladesh: 2017-2030<sup>24</sup>

The plan (which encompasses both public and private institutions) addresses the importance of enhancing teaching quality by increasing the number of faculty members holding PhDs. The document proposes the creation of a National Research Council, which would be responsible for planning national research priorities, coordinating activities between different partners and funding sources, increasing the research capacity of the country, and awarding competitive research grants. The plan expects the share of GDP for the education sector to be 3 per cent by 2021 and 6 per cent by

<sup>23</sup> World Bank *Bangladesh: Higher Education Quality Enhancement Project*.

<sup>24</sup> *Strategic Plan for Higher Education in Bangladesh*

2030. The plan also proposed to establish a university specialising only in research.<sup>25</sup>

## Seventh Five Year Plan (2016-2020): Accelerating growth, Empowering Citizens<sup>26</sup>

Chapter 11 sets out the education section development strategy. Key tertiary level initiatives included the HEQEP project mentioned above, a target to increase the higher education enrolment to 20 per cent by 2020 (it reached almost 18 per cent in 2017),<sup>27</sup> emphasis on research and training (via the Bangladesh Research Network), and establishment of an accreditation council. Key challenges identified in the higher education sector include: poor infrastructure, gap between the formulation and actual implementation of development projects in the universities, only 45 percent of tertiary students are female, disciplines remains inclined towards humanities and social sciences instead of science, technology and applied subjects, and intense competition for the limited seats in public universities.

## United Nationals Sustainable Development Goals: Agenda 2030<sup>28</sup>

The Sustainable Development Goals are a collection of 17 global goals set by the United Nations General Assembly in 2015, to be achieved by 2030. Goal number four relates to Quality Education to “ensure inclusive and equitable quality education and promote lifelong learning opportunities for all”. The Bangladesh government reported in Nov 2017 that the 2030 Agenda has been incorporated into its 7th Five-Year Plan for 2016-2020, and that an additional US\$928 billion will be needed to fully implement the Goals in Bangladesh.

## Vision 2021

In 2008 the Government of Bangladesh declared ‘Vision 2021’ with a target to make Bangladesh a middle-income country by 2021, the golden jubilee of the nation.<sup>29</sup> The concept of a Digital Bangladesh is central to the strategy. However, the policy has been criticized for technological optimism in the context of low internet penetration and inadequate electricity generation.

<sup>25</sup> *The Daily Star*, 20 May 2017 [Bangladesh - Rise from the ashes](#).

<sup>26</sup> *Local Government Engineering Department 7th Five Year Plan (2016-2020)*.

<sup>27</sup> *UNESCO Education and Literacy* Gross tertiary enrolment rate of 17.6 per cent in 2017 (20.6 per cent for males and 14.5 per cent for females).

<sup>28</sup> *United Nations Sustainable Development Goals Sustainable Development Goals*.

<sup>29</sup> *Bangladesh Hi-Tech Park Authority The government of Bangladesh has declared 'Vision 2021'* (Page 5).

# EDUCATION

## Pre-Tertiary Education

Bangladesh's Ministry of Primary and Mass Education (MoPME) is responsible for primary education (grades 1 to 5), and the Ministry of Education (MoE) oversees secondary and post-secondary education, with some overlap of responsibility between the two.<sup>30</sup> The education system is divided into three streams: general, technical and religious (madrasah). Five years of education are compulsory from the age of six (Grades I–V). The Government had planned to extend free and compulsory primary education to all students through grade 8 (lower secondary level) by 2018, however this goal has not been met.

Nevertheless, Bangladesh has made huge strides over the past two decades by ensuring access to education, especially at the primary level and for girls. The country's net enrolment rate at primary level increased from 80 percent in 2000 to 98 percent in 2015, and secondary enrolment increased from 45 per cent to 54 per cent over the same period. The percentage of children completing primary school is now 80 percent, and Bangladesh has achieved gender parity in access at primary and lower secondary level.<sup>31</sup> However, the World Bank has identified a number of challenges that remain:

**Quality.** Bangladesh's workforce is largely undereducated (only 4 percent of workers have higher than secondary education), and the overall quality of the country's human capital is low. In general, students have weak reading skills, and curricula, teaching approaches and examination systems at all levels focus more on rote learning than on competencies, critical thinking and analytical skills.

**Equitable Access.** Repetition (the number of times students repeat grades) and dropout rates are still significant in Bangladesh, and only 50 percent of the students who enrol in first grade reach grade 10. Around 5 million Bangladeshi children between the ages of 6 and 13 – mostly from poor families, urban slums, and hard-to-reach areas – remain out of school. Women continue to lag behind men in higher secondary and tertiary education.

Participation in education is also hampered by a low marriage age for girls, with more than one in five girls with primary education married before the age of 15. Overall, 48 per cent of the population has not completed primary school and Bangladesh is home to one of the world's largest illiterate populations.

**Financing.** Government spending on education as a share of the gross domestic product is around 2 percent, the second lowest in South Asia, and lower than in most other countries at similar levels of development.

Bangla is the main teaching medium, although some programmes are taught in English, particularly at private schools. English is necessary for university entry and proficiency is highest among the country's middle class and elite, particularly in urban areas. Increasing English proficiency is a challenge given the need to first achieve basic literacy, which remains as low as 30 per cent among the poorest young people.

<sup>30</sup> *The Daily Star*, 4 April 2018 [Education Goal 2030 - What will it take to reach it? "What happens between grade 5 and 8 is hamstrung by the responsibility for school education being divided between two ministries"](#).

<sup>31</sup> World Bank, 13 October 2016 [Bangladesh: Ensuring Education for All Bangladeshis](#).

## Higher Education

Bangladesh's higher education institutions are comparatively young and many were founded after the 1992 Private University Act. The tertiary education sector in Bangladesh is comprised of universities, colleges (including professional and teacher training) and madrasas (religious education) institutions, all of which are provided by the public and private sectors. The Bangladesh Bureau of Educational Information and Statistics (BANBEIS) publishes an impressively detailed annual summary of education statistics and key performance indicators.<sup>32</sup>

As of early 2019, the University Grants Commission recognised 42 public and 103 private universities, most of which are located in the capital, Dhaka.<sup>33</sup> In addition, there are about 560 public and almost 5,000 private colleges (excluding madrasas) in operation.

As a result of broadening primary, secondary and higher secondary education, demand for tertiary education in universities continues to increase. The problem regarding access to higher education arises from the fact that there is intense competition for the limited seats in public universities and a few prestigious institutions, and for fields perceived as having high market value. The emergence of private universities has been able to partially meet demand. There are also concerns about the quality level of teaching and learning in private institutions.<sup>34</sup>

Separate to the above institutions, there are 288 public and 5,609 private institutions offering Technical and Vocation Education programmes at mid-secondary, upper-secondary and post-secondary-non-tertiary level. Female participation in these public institutions is typically less than 20 per cent.

Unlike public institutions, which are extremely low cost, private universities charge about US\$1,200 per year, putting them out of reach of many families. Some of the top ranked private universities can charge over US\$5,000 per year.<sup>35</sup> However, private institutions may have quotas for low-income students, and some offer higher education grants and tuition fee discounts to female applicants.

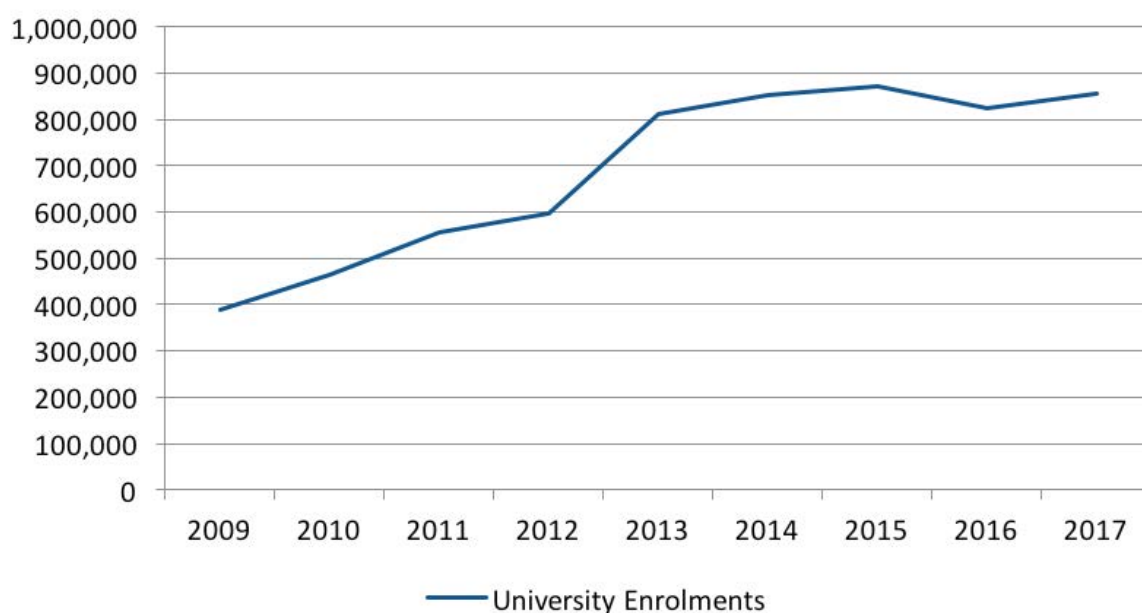
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<sup>32</sup> BANBEIS Education Database.

<sup>33</sup> University Grants Commission List of universities.

<sup>34</sup> 7<sup>th</sup> Five Year Plan (2016-2020), page 544.

<sup>35</sup> World Scholarship Forum [Top 10 private universities in Bangladesh and State University Bangladesh Tuition & Fees](#).

**Figure 4 Domestic Higher Education Students**

Source: BANBEIS<sup>31</sup>

In 2017, 2.9 million students were enrolled on tertiary programmes; a phenomenal increase of 1 million students since 2010. As shown in Figure 4, enrolment in universities has increased from 390,000 in 2009 to 860,000 in 2017, of which 45 per cent are enrolled in private universities and 11 per cent are enrolled at postgraduate level. Growth has moderated in recent years as the MoE has adopted a more cautious approach to licensing of new universities, owing to quality concerns. UGC issues periodic warnings to students not to enrol in certain private universities on the grounds of various problems, including irregular holding of classes and exams, and mismanagement. The government has closed several such institutions. Blacklisted institutions are named on the UGC website.<sup>36</sup> On the other hand, the MoE approved two new private universities in 2018, with eight more awaiting approval.<sup>37</sup>

University places are in high demand and most tertiary students (around 63 per cent) attend university affiliated higher education colleges. While only about one third of university students are female, about 45 per cent of students enrolled in the university affiliated colleges are female. Given the large population size and increasing demand for education, there is significant potential for development within the higher education sector, particularly in terms of increasing access for girls and students from poorer households.

<sup>36</sup> UGC List of private universities (See institutions with an asterisk beside their name).  
<sup>37</sup> BDNews24, 18 April 2018 [Government approves two new private universities](#).

## International Student Recruitment

### Overall Outbound Trend

The lag between domestic provision and demand arising from an expanding middle class is seeing an increasing number of students looking further afield for higher education. UNESCO reports that 55,787 Bangladeshi students were studying abroad in 2017, over double the amount in 2012 (23,036).<sup>38</sup> As this represents an outbound mobility rate of just 2.0 per cent — due to Bangladesh's large student population — the scope for further growth is apparent.

According to UNESCO data, Malaysia is by far the most popular student destination (28,456) followed by the US (6,492), Australia (4,652), UK (3,116) and Canada (2,028).<sup>39</sup> Overseas education is in high demand given the competitive local job market and high value placed on international qualifications; however, it remains unaffordable for the vast majority of Bangladeshi's. Bangladeshi students going abroad are generally from the affluent class and English-medium background, but over time students from the middle class are also aspiring to study abroad.

At upper-secondary level, Bangladeshi students study for the Higher Secondary Certificate (HSC). This is broadly equivalent to UK GCSEs, the Australian Senior Secondary Certificate of Education and the US High School Graduation Diploma. In Bangladesh, the HSC gives access to undergraduate study, although further qualifications such as GCE A-levels or a foundation course are generally required for undergraduate programmes abroad. High-scoring students with a Bachelor of Arts, Science and Commerce (honours) may be considered for master's programmes abroad while ordinary (non-honours) degree holders may access undergraduate programmes.

As students from a developing country, Bangladeshi students are eligible to apply for a wide range of scholarships, including Fulbright, Chevening, Commonwealth, Australia Award and DAAD scholarships, as well as scholarships from national governments, such as those of China, Japan and India. Bangladeshi government scholarships are also available for high-achieving students through the Economic Relations Division of the Finance Ministry. Study abroad is also sponsored by a large number of private sector agencies.

### UK Recruitment

In 2017/18, 2,345 students from Bangladesh were enrolled in higher education institutions in the UK, a 53 per cent drop from 5,025 students recruited in 2013/14. This is despite outbound mobility from Bangladesh more than doubling over this period, and despite the UK having strong historical ties with Bangladesh, a large Bangladeshi Diaspora and a similarly structured public education system. The cause of this collapse is generally attributed to the change in UK student migration policy in 2012, when the UK government scrapped the post-study work visa which had allowed international (non-EU) students to stay in the UK and work for up to two years after graduation. With the introduction of a visa interview process, many students from Bangladesh (and elsewhere in South Asia) were declined study visas for failing to convince the visa officers about the authenticity of their stated intentions, and UK universities began to switch their focus away from this region.

<sup>38</sup> UNESCO Institute for Statistics *UIS.Stat*.

<sup>39</sup> UNESCO Institute for Statistics *Global Flow of Tertiary-Level Students*.

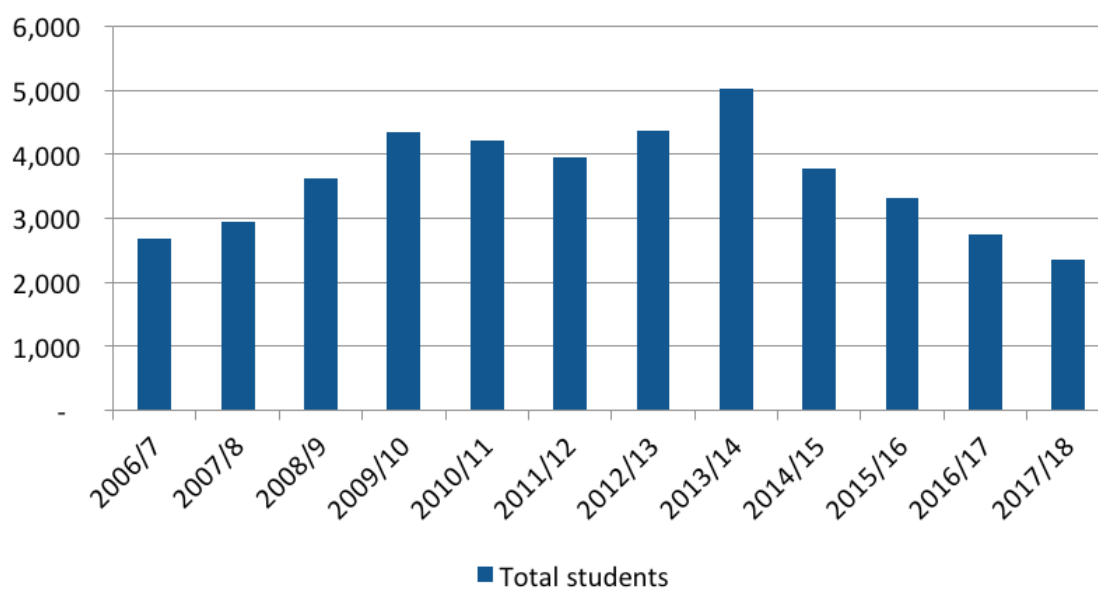
As summarised in table 1, Bangladesh is the third largest recruitment market in South Asia for the UK, behind India and Pakistan. Nearly two thirds of students from Bangladesh in the UK were pursuing postgraduate programmes in 2016/17; the majority of these (70 per cent) on taught master's programmes.<sup>40</sup> The proportion of female Bangladeshi students in the UK increased from 20 per cent in 2010 to 30 per cent in 2016/17.

**Table 1 South Asian Country Enrolment in UK**

Country	Students in UK 2017/18	% Change since 2013/14
India	19,750	-6%
Pakistan	5,610	-22%
Bangladesh	2,345	-53%
Sri Lanka	1,135	-56%
Nepal	525	71%

Source: HESA

**Figure 5 Bangladesh Student Enrolments in the UK**

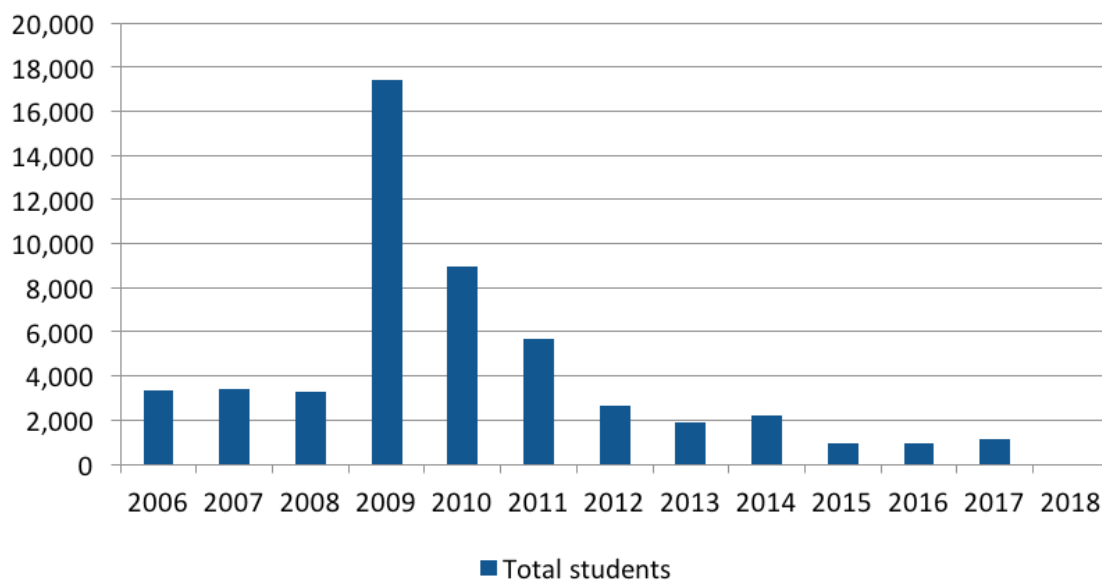


Source: HESA

<sup>40</sup> UK Higher Education Statistics Authority (HESA).

A surge in student visas issued to students from Bangladesh (and other countries) in 2009 led to concerns about potential abuse of the visa system by unscrupulous agents and bogus colleges.<sup>41</sup> In response, applications for student visas from students in north India, Bangladesh and Nepal were temporarily suspended in early 2010. UK student visa issuance fell dramatically from a peak of 17,449 in 2009 to just 961 in 2016, an 18-fold decrease – reflecting both a tightening of the immigration system, and a decrease in demand for study in the UK by students from Bangladesh.

**Figure 6 UK Student Visas (Tier 4 and Equivalent)**



Source: UK Home Office

## Recruitment Channels

Newspaper readership in Bangladesh is high, driven by rising literacy rates and digital newspapers. Indian media are particularly popular and English language media can be found in urban areas. In 2018, the highest-circulation daily was *Bangladesh Pratidin*, followed by *Prothom Alo*, *Kaler Kantha* and *Jugantor*, while the top English-medium paper was *The Daily Star* – a consistent raking for the past few years.<sup>42</sup>

Owing to the high cost of having a fixed internet connection in the home, internet centres and cafes are widespread. Internet access is often interrupted by planned and sporadic power cuts. Nonetheless, the government is aiming for a 'Digital Bangladesh' by 2021, meaning that IT infrastructure should improve in the coming years. The number of mobile Internet users is increasing as the middle class grows and handset and contract prices fall.

<sup>41</sup> BBC News, 13 May 2010 [Bogus students facing global crackdown](#).

<sup>42</sup> Department of Films and Publications, 'national daily circulation and advertising rates', May 2018.



According to the Bangladesh Telephone Regulatory Commission (BTRC), as of June 2017, 81 million citizens have Internet access; two fold more than a decade ago, and 93 per cent access internet through their mobile network. Facebook dominates the social media landscape, accounting for 93 per cent of the market in 2018.<sup>43</sup> The popularity of Facebook means that online student groups and forums often use this medium. In 2017, Dhaka was ranked second in terms of having the most active Facebook users (22 million) in the world, after Bangkok with 30 million.<sup>44</sup>

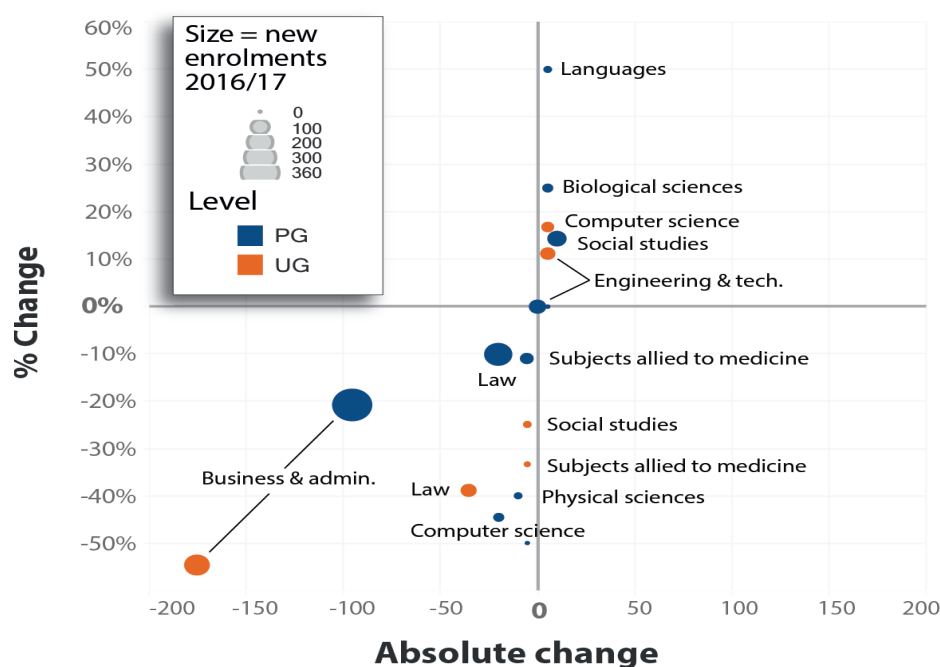
Student recruitment fairs run frequently in Dhaka (to a lesser extent in other cities), organised by national education bodies from the UK, Australia, Canada and New Zealand, as well as numerous agents operating in the country.

### Subject Area Demand

Business & Administration is by far the most popular subject for students from Bangladesh in the UK, although new UK enrolments fell by 35 per cent in 2016/17. Law and Engineering are also popular, with the new enrolments for the latter registering a slight increase in 2016/17, despite overall student numbers from Bangladesh falling by 20 per cent. The number of new enrolments on Education programmes more than doubled to 65 students in 2016/17.

In 2016/17, almost two thirds of students from Bangladesh were enrolled on postgraduate programmes in the UK, although 58 per cent of new enrolments on computer science programmes and 43 per cent on engineering programmes were at undergraduate level.

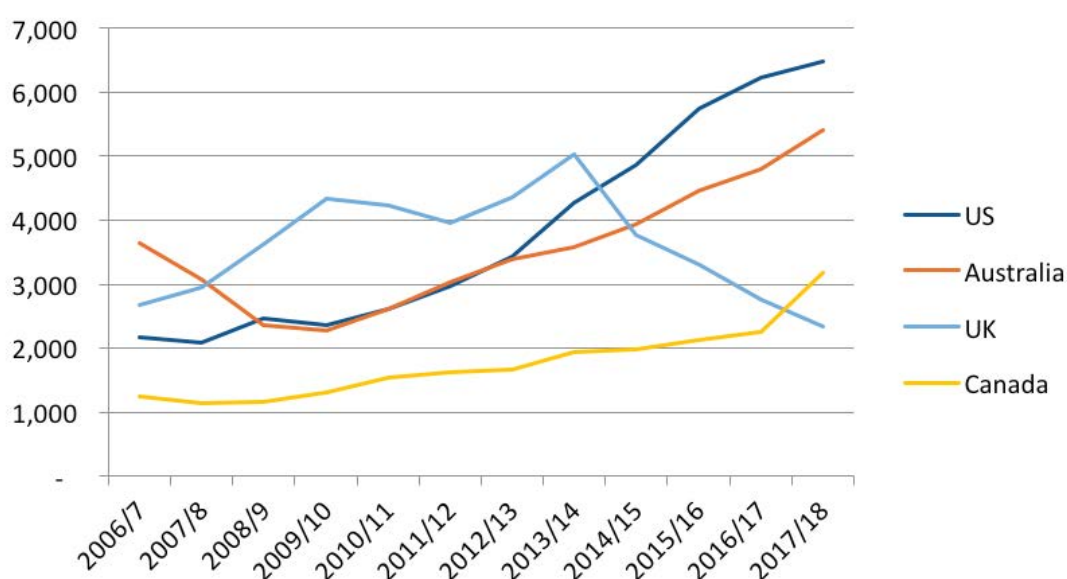
**Figure 7: Change in UK Enrolments by Subject Area, 2014/15 through 2016/17**



<sup>43</sup> Statcounter Global Stats, Jan 2019 "social media stats Bangladesh".  
<sup>44</sup> Bdnews24.com, April 2017 "Dhaka ranked second in number of active Facebook users".

## Competitor Activity

**Figure 8 Bangladesh enrolments in the UK and other countries**



Source: HESA, IIE, AusTrade, StatCan

According to 2017 UNESCO data, Malaysia is by far the most popular student destination (28,456) followed by the US (6,492), Australia (4,652), UK (3,116) and Canada (2,028).

The number of Bangladeshi students in Malaysia has been fairly steady over the past four years, marginally decreasing from 29,146 in 2014 to 28,456 in 2017. The main reasons for Malaysia being the most popular destination are reported as: lower education cost (per semester tuition fees for international students at University of Malaya range from \$1,270 to \$3,580); relatively low cost of living for international students (\$2,370-2,840 per year, including food, travel and accommodation); and many Malaysian universities having joint programmes with universities in the UK, US and elsewhere.<sup>45</sup>

The data contained in Figure 7 are from national sources but correspond reasonably well with the UIS data discussed above. According to IIE data, the US has seen tertiary enrolments from Bangladesh almost treble since 2009/10, hitting 6,472 in 2017/18. Australia hosted 5,401 Bangladeshi students in 2017 after a decade of steady growth. And Canada looks set to have overtaken the UK as a destination in 2017/18.

India was historically a major destination for Bangladeshi students but expansion of the private universities system in

<sup>45</sup> *New Age Bangladesh*, 31 August 2018, [Bangladeshi students heading for univs abroad on rise](#)

Bangladesh reduced the outflow, with about 1,100 travelling to India for study in 2016. The Indian government continues to offer a range of scholarships to Bangladeshi nationals through the Indian Council for Cultural Relations and has so far awarded 3,000 such scholarships.<sup>46</sup>

China has provided full government scholarships to Bangladeshi students since 2013, increasing the number from 162 to 192 in 2016. In 2015 almost 1,000 Bangladeshis were reported to have studied in China under different sponsorship schemes.<sup>47</sup> The Chinese Ministry of Education reported in 2018 that India and Pakistan are among its top 10 source countries for foreign students.<sup>48</sup>

Germany also appears to be an increasingly important destination; UNESCO reports that 2,008 Bangladeshi students studied there in 2016. While Germany abolished tuition fees for undergraduate students at all public universities in 2014 (making study free for both domestic and international students) since 2017 non-EU students must pay to study in the Baden-Wurttemberg area (home to Stuttgart).

## Transnational Education

In 2014, the Bangladesh Ministry of Education formulated a rule allowing foreign universities, branch campuses or study centres to operate academic activities in the country.<sup>49</sup> Before the rule, it was illegal for foreign universities to establish branches or run academic activities or distance education in Bangladesh under the Private University Act 2010. However, while the UGC was supportive of foreign university branches, the ministry has blocked approval of several applications, including from a United Kingdom branch campus and from Monash University in Australia.<sup>50</sup> Private university owners have routinely opposed government moves to allow foreign universities to open branches in Bangladesh, and their lobbying appears to have been influential. In May 2018 UGC issued a notice stating that it has not permitted any foreign university to set up branch, campus or study centre in Bangladesh, warning students against admission to entities that claim to belong to this category.

Overall, Bangladesh is not an active host country for TNE programmes and opportunities appear muted at present. Between 2013/14 and 2016/17, the number of Bangladeshi students enrolled on UK TNE programmes increased by 2 per cent as compared with a 24 per cent increase in India and 44 per cent in Sri Lanka. Most of the Bangladeshi TNE students are enrolled on UK distance learning programmes, supported by local tuition providers who are often affiliated to the UK institution.

<sup>46</sup> [bdnews24.com](#), 7 January 2018, [India announces scholarships for Bangladeshi students](#)

<sup>47</sup> [bdnews24.com](#), 7 April 2016 [China increases full scholarships for students from Bangladesh](#)

<sup>48</sup> China Ministry of Education, 3 April 2018 [Growing number of foreign students choosing to study in China](#)

<sup>49</sup> University Grants Commission, [Rules for operating a foreign branch campus or a study centre 2014](#) (Bengali only)

<sup>50</sup> University World News, 15 December 2016 [Education ministry blocks foreign university branches](#)

