

Market Intelligence Brief

Bangladesh

February 2024



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1 Executive Summary

Bangladesh is one of the most densely populated countries in the world and lies on flat, flood-prone land sandwiched between India to the west and north, Myanmar to the east, and the Bay of Bengal to the south. After decades of unbroken and fast-paced economic growth, the country has enjoyed significant economic progress and poverty reduction. Since gaining independence in 1971, Bangladesh has gone from being one of the world's poorest nations to reaching lower-middle income status in 2015 and is on track to graduate from the UN's Least Developed Countries (LDC) list in 2026.

Strong economic growth in Bangladesh has been aided by favourable demographics. With a population of almost 170m in 2021, Bangladesh is the eighth most populous country in the world, and the third most populous in South Asia, after India and Pakistan. Although population growth is slowing, according to the UN, the population will continue to grow in the years ahead to 184m by 2030 and to more than 200m by 2050. Alongside the scale of its population, Bangladesh has a remarkably youthful population, with around 36 per cent of the population being under the age of 20 in 2021.

The large youth population poses a significant challenge to the country's education system, but over the past decade, Bangladesh has made strong progress in expanding access for students and enrolment ratios at the primary, secondary and tertiary levels have increased significantly. However, there remains a concerning number of out-of-school children, particularly at the secondary education level and demand for high-quality tertiary education far outstrips supply. Furthermore, while access to education has improved, the quality of education provision remains a significant challenge.

According to estimates from UNESCO, almost 53,000 students from Bangladesh travelled abroad to study at the higher education level in 2021. This makes the Bangladeshi outbound student market comparable in size to other emerging economies such as Colombia, Egypt and Malaysia, but still considerably smaller than other South Asian markets including India (508,000), Nepal (89,000) and Pakistan (72,000). Outbound student numbers from Bangladesh peaked at around 62,000 in 2016, before falling to 44,000 by 2019. However, growth resumed in 2020 and 2021, with 2021 levels now around 15 per cent below previous peak levels.

Looking at the UK's recruitment of Bangladeshi international students, after peaking at just over 5,000 in the 2013/14 academic year, student numbers fell consistently for several years thereafter, declining to just 2,700 in 2018/19. This sharp decline came against the backdrop of strong growth in total outbound student numbers from Bangladesh over the same period. As such, 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.

However, there has been a significant reversal in fortunes in this market over recent years, with growth resuming in the 2019/20 academic year, before surging strongly in 2020/21 to over 6,000 students and further in 2021/22, to just over 12,000 students. The sharp increase in the UK's popularity as a study destination for Bangladeshi students is attributed to the UK's introduction of the Graduate Route in summer 2021, with Bangladesh becoming the UK's 12th largest source market for international students globally in 2021/22.

The transnational education (TNE) market in Bangladesh is relatively underdeveloped, with 2,160 Bangladeshi students enrolled on UK TNE and distance learning courses in the 2021/22 academic year. This compares to other South Asian markets such as Sri Lanka (45,980), India (12,075), Nepal (10,700) and Pakistan (9,770) where there are considerably more TNE students enrolled. Significant policy development and clarification is required for the Bangladeshi TNE market to reach its potential.

2 Introduction

This report was produced by the British Council's South Asia Education Insight Hub, with external research support provided by Oxford Economics.^[1] This report is designed to provide UK education institutions with unparalleled data, insight and analysis to support their international education strategies, recruitment activities and partnership development work. The report is also targeted at a UK and Bangladeshi policy maker audience, by highlighting opportunities and barriers to education and research cooperation that exist between the two countries.

Using the latest data from the most reliable sources, this Market Intelligence Brief represents a window onto Bangladesh's education system and student population, as well as the economic and demographic factors, and policy priorities and developments that shape the country's international education outlook. The report examines various aspects related to the internationalisation of Bangladesh's education system – including student mobility, transnational education programmes and research collaboration – and highlights national-level education projects and partnerships between the UK and Bangladesh.

The information contained in this report is based primarily on desk-based research and data analysis, supplemented with insight and context provided by British Council colleagues on the ground in Bangladesh.

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Comments, queries and suggestions in relation to this report are welcome and may be submitted to **Sandeepa Sahay, Head of South Asia Education Insight Hub** at email sandeepa.sahay@britishcouncil.org

^[1] www.oxfordeconomics.com/

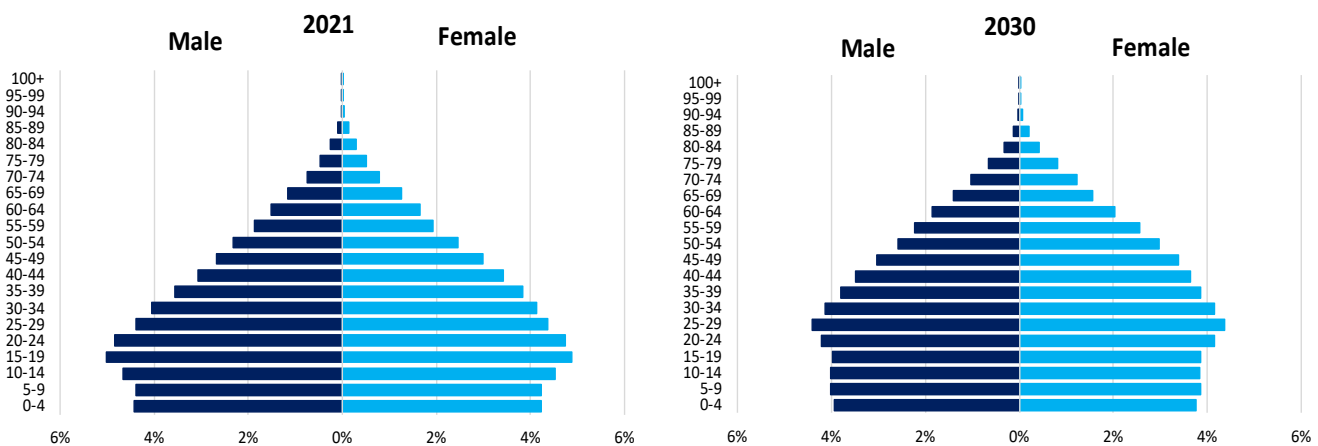
3 Macro Environment

3.1 People

With a population of almost 170m in 2021, Bangladesh is the eighth most populous country in the world, and the third most populous in South Asia, after India and Pakistan.¹ However, while strong relative to many other countries around the world, population growth has slowed in recent decades, from an average of 2.5 per cent per year in the 1980s to around 1.2 per cent per year over the last decade. This has been driven by a consistent decline in Bangladesh’s total fertility rate, which has declined from 6.3 at the start of the 1980s to around 2 in 2021.² This is slightly below both the global (2.3) and South Asia (2.2) averages and will mean that by the 2030s, population growth in Bangladesh will slow to less than 1 per cent per year. Nonetheless, according to the UN, Bangladesh’s population will grow to 184m by 2030 and to more than 200m by 2050.

Bangladesh has a remarkably youthful population, with around 36 per cent of the population being under the age of 20 in 2021. Looking ahead, although the population is expected to age gradually in future, the proportion of under 20s in the population is expected to remain high at around 31 per cent by 2030. At the same time, the share of the population aged over 65 currently stands at around 6 per cent and is expected to rise marginally to 8 per cent by the end of the decade.

Figure 1: Bangladesh’s population pyramid, 2020 and 2030



Source: UN Population Division

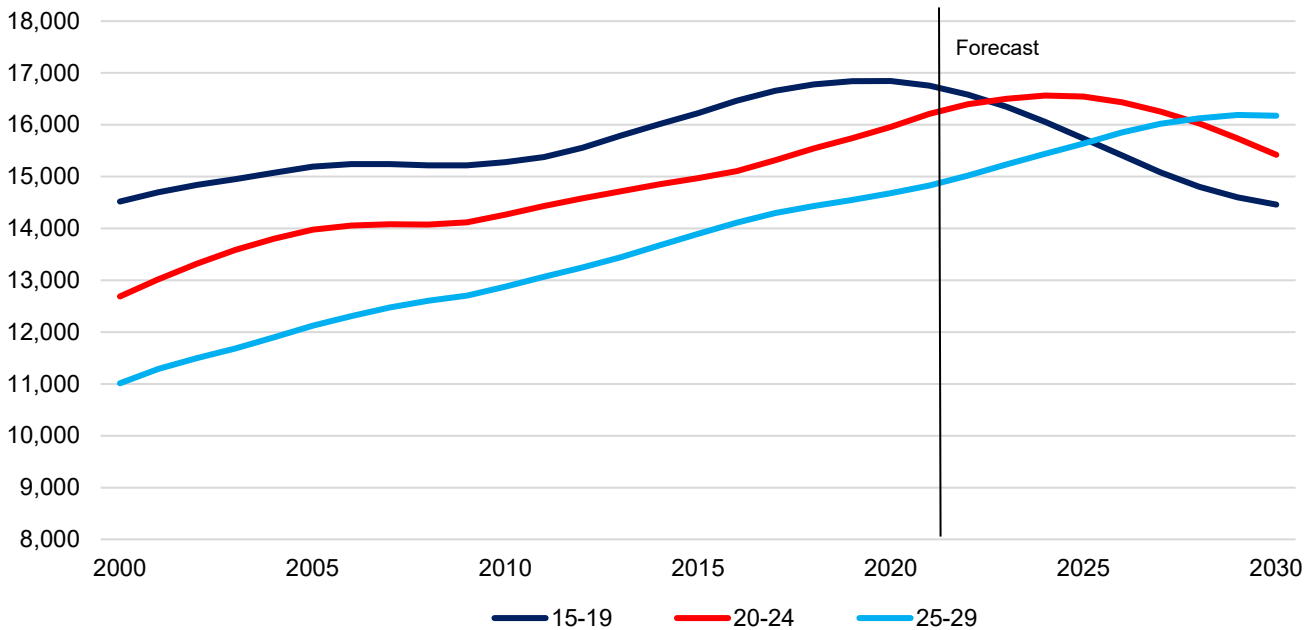
Looking specifically at the age bands of most relevance to UK higher education institutions (HEIs), the populations of each of these groups have grown strongly and consistently over most of the last two decades. Over this period, the student age population (15-29) grew from around 38m in 2000, to 42m by 2010 and further to almost 48m by 2021. However, looking ahead a significant

¹ World Population Prospects, United Nations Population Division, 2022, www.population.un.org/wpp/

² Fertility rate, total, (births per women), World Bank, 2023, www.data.worldbank.org/indicator/SP.DYN.TFRT.IN

reversal is expected, with declines expected in both the 15-19 and 20-24 age groups. Continued growth is anticipated in the 25-29 age group, but this will not be enough to offset the declines expected in the other age groups. This means that overall, the 15-29 age group is projected to contract to 46m by 2030.

Figure 2: Bangladesh’s student age population (000s)



Source: UN Population Division

Bangladesh’s favourable age structure offers significant potential for driving economic growth, through a ‘demographic dividend’, which started in 2007 and is projected to continue until 2040. However, to fully benefit from its demographic dividend, Bangladesh needs to prioritise improvement in education, healthcare, and job opportunities for the youth, while ensuring social welfare and healthcare for the growing elderly population. Substantial changes in these areas are still lacking, posing a risk of losing this once-in-a-lifetime opportunity. Indeed, in education, Bangladesh has made remarkable progress in establishing a comprehensive education infrastructure to meet the needs of its youthful population, comprising primary schools, colleges, and universities. But to fully leverage the potential of its growing student population, the country must prioritise education quality alongside infrastructure development in the years ahead.³

According to the UN, around 40 per cent of the Bangladeshi population lived in urban areas in 2022, which is marginally ahead of the South Asia average of 38 per cent. The urbanisation rate is expected to rise to approximately 46 per cent by the end of the decade and further to 58 per

³ Utilise the demographic dividend as an asset, before it becomes a liability, *The Daily Star*, 2023, www.thedailystar.net/opinion/views/news/utilise-the-demographic-dividend-asset-it-becomes-liability-3333396

cent by 2050.⁴ Dhaka is the most populous city in Bangladesh with a population of over 10m, followed by Chittagong (4.0m) and Khulna (1.3m).⁵

Islam is the largest religious denomination in Bangladesh, with the vast majority (88 per cent) of the population identifying as Muslim. Other religions including Hinduism, Buddhism and Christianity make up the remaining 12 per cent of the population.⁶ Bangladesh's official language is Bangla and is spoken by the vast majority (98.8 per cent) of the population. Due to the British colonisation of the country, English is also a widely spoken and commonly understood language in Bangladesh. Several other languages are also spoken in Bangladesh, including Arakanese, Assamese and Chak.⁷

According to the English First (EF) English Proficiency Index, Bangladesh has a 'moderate' level of English proficiency, ranking 60th out of the 113 countries covered by the analysis in 2023 and 8th out of 23 Asian countries in the analysis, with a similar level of English proficiency as in other South Asian countries such as India and Nepal.⁸

3.2 Economy

Bangladesh has a strong track record of economic growth and development, with its demographic dividend, strong ready-made garment (RMG) exports, resilient remittance inflows, and stable macroeconomic conditions supporting rapid economic growth over the past two decades. Linked to its fast rate of economic growth, Bangladesh has experienced remarkable poverty reduction in recent decades. From being one of the poorest nations at birth in 1971, Bangladesh reached lower-middle income status in 2015 and is on track to graduate from the UN's Least Developed Countries (LDC) list in 2026. Poverty declined from 11.8 per cent in 2010 to 5.0 per cent in 2022, based on the international poverty line of \$2.15 per day (using 2017 Purchasing Power Parity exchange rate). Moreover, human development outcomes have improved along many dimensions.⁹

The textile industry is critical to the economy, generating nearly 80 per cent of all exports, but is prone to work stoppages and labour unrest. The agriculture sector is also an important part of the Bangladeshi economy, particularly in rural areas. Agricultural production accounts for around 15 per cent of the country's GDP and approximately two-thirds of employment. However, agricultural employment cannot absorb all the rapidly growing labour force, and so many Bangladeshis seek work abroad and repatriate a large proportion of their earnings. Remittances from abroad account for around 6 per cent of GDP and are the second-largest source of foreign exchange after exports of textiles and garments.

⁴ World Urbanization Prospects, *UN Population Division*, 2018, www.population.un.org/wup/

⁵ Population of cities in Bangladesh, *World Population Review*, 2023, www.worldpopulationreview.com/countries/cities/bangladesh

⁶ Bangladesh, *CIA World Factbook*, 2023, www.cia.gov/the-world-factbook/countries/bangladesh/summaries/

⁷ Languages of Bangladesh, *Bangladesh.com*, 2023, www.bangladesh.com/culture/languages/

⁸ English Proficiency Index, *English First*, 2022, www.ef.com/wwen/epi/regions/asia/bangladesh/

⁹ Bangladesh, *World Bank*, 2023,

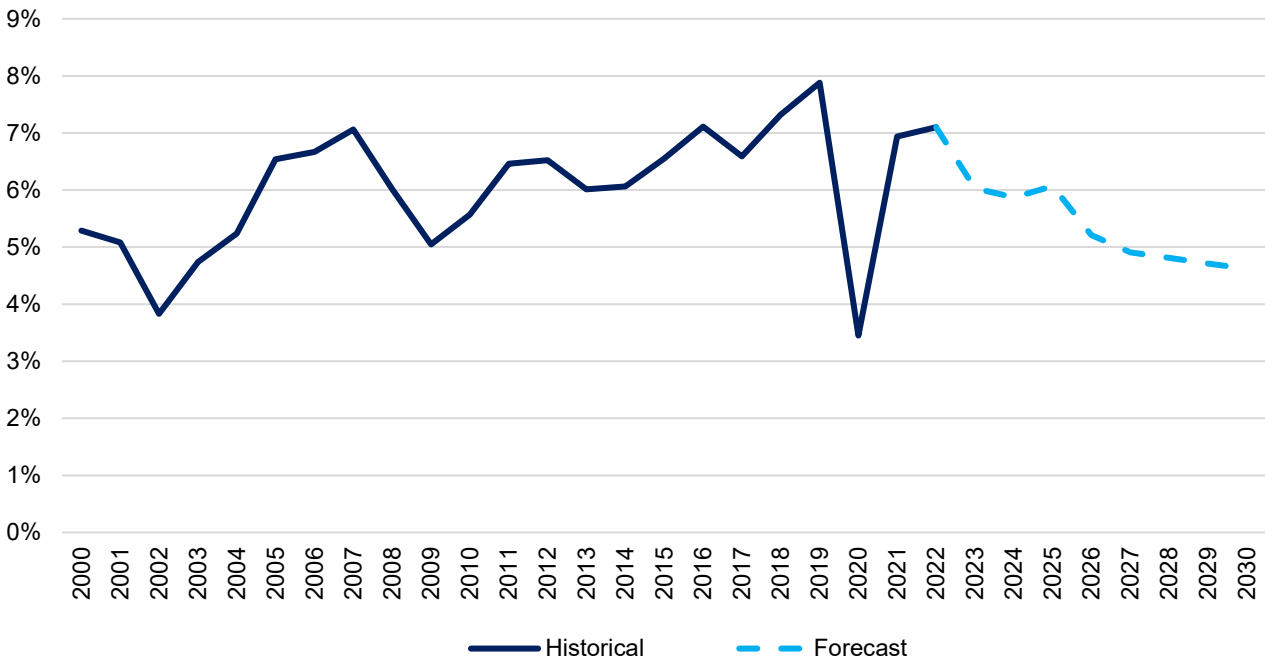
www.worldbank.org/en/country/bangladesh/overview#:~:text=Bangladesh%20has%20a%20strong%20track,over%20the%20past%20two%20decades.

Bangladesh's biggest trading partner is the EU, accounting for around 50 per cent of exports. This strong trading relationship is underpinned by the EU-Bangladesh Cooperation Agreement which grants duty-free, quota-free access for all exports.¹⁰

Unlike its neighbours and most other economies around the world, the Bangladeshi economy continued to expand throughout the pandemic, growing by 3.5 per cent in 2020 and 6.9 per cent in 2021 according to the Bangladesh Bureau of Statistics. However, despite its record of strong and stable growth, the country remains poor by international standards, rife with corruption, and prone to natural disasters in the form of floods and cyclones that strike annually during the monsoon season, often taking the lives of thousands of poor Bangladeshis who are forced to work and live on low-lying land amid the sprawling delta waterways that dominate the geography of the country.

Bangladesh's robust recovery from the coronavirus pandemic was interrupted by the Russia-Ukraine war, which caused a sharp deterioration of Bangladesh's current account, a depreciation in the taka, and a decline in foreign exchange reserves. Consequently, Bangladesh requested a US\$3.3bn loan under the Extended Credit Facility and the Extended Fund Facility from the IMF, which was granted in February 2023. The loan is designed to help preserve macroeconomic stability, whilst fostering inclusive and sustainable economic growth. Looking ahead, after growth of around 7.1 per cent in 2022, Oxford Economics expects GDP growth to ease to around 6 per cent per year in 2023, and for this pace of growth to be maintained in 2024 and 2025, before slowing to a pace of just below 5 per cent per year by the end of the decade.

Figure 3: Bangladesh's real GDP growth



Source: Haver Analytics / Oxford Economics

¹⁰ The European Union and Bangladesh, EU, 2021, [www.eeas.europa.eu/bangladesh/european-union-and-bangladesh_en?s=164#:~:text=Today%2C%20by%20revenue%2C%20over%20half,%22%20\(EBA\)%20scheme](http://www.eeas.europa.eu/bangladesh/european-union-and-bangladesh_en?s=164#:~:text=Today%2C%20by%20revenue%2C%20over%20half,%22%20(EBA)%20scheme)

Bangladesh's GDP per capita (nominal terms) in 2022 stood at US\$2,530, which is ahead of regional neighbours including India (US\$2,380), Pakistan (US\$1,550) and Nepal (US\$1,290). Bangladesh's GDP per capita (nominal terms) is expected to grow to around US\$4,000 by 2030, which should underpin further growth in middle- and high-income households within the country. At present, there are around 440,000 households with income above US\$35,000 (constant 2015 prices), which is expected to more than triple to almost 1.4m by 2030.

As of 1 July 2023, Bangladesh has formally adopted a floating exchange rate regime. Before this and since gaining independence, the country had made use of a series of fixed exchange rates to manage volatility. Since January 2022, the taka has depreciated by more than 25 per cent against the US dollar as the current account deficit widened and investors sought safe assets. This, alongside rising inflation, means Bangladesh's foreign exchange reserves have depleted as import prices have risen sharply. Currently trading at around 110 per US dollar and 140 per pound, Oxford Economics expects that although the currency will stabilise, it will continue to depreciate in the years ahead against major global currencies, falling to a value of less than 130 per US dollar and 185 per pound by the end of the decade. This would significantly add to the cost of international study for Bangladeshi students.

3.3 Government and education policy

Bangladesh's constitution specifies a parliamentary democracy, but this has been interrupted since its inception in the early 1970s by various coups. Parliament is elected through a popular vote and elects the President, who then appoints the leader of the legislative majority party (or coalition) as Prime Minister.¹¹ Local government is primarily in the hands of popularly elected executives and councils, with each of Bangladesh's divisions headed by a commissioner.

Political instability has been a persistent feature of Bangladesh's history. For much of the past two decades, parliament has been plagued by stalemates and opposition walkouts. The situation has been particularly uncertain in recent years and Bangladesh is regularly ranked as one of the world's most corrupt countries by Transparency International, the anti-corruption watchdog.

The Ministry of Education (MOE) in Bangladesh is responsible for the administration and development of the education sector from the post-primary to higher education level including technical and vocational education (TVET), while the Ministry of Primary and Mass Education (MOPME) is responsible for primary education.^{12,13}

Significant improvements in access to education in Bangladesh have contributed to social and economic progress. Four decades ago, less than a third of children finished primary school, but today this has risen to around 80 per cent.¹⁴ However, while access to education has improved, the quality of education provision remains a significant challenge. Given Bangladesh's very large and youthful population, development of the education sector is a key government priority. The

¹¹ Government and Society in Bangladesh, *Britannica*, 2023, www.britannica.com/place/Bangladesh/Government-and-society

¹² Ministry of Education (Bangladesh), *Devex*, 2023, www.devex.com/organizations/ministry-of-education-bangladesh-127980

¹³ Ministry of Primary and Mass Education (Bangladesh), *Devex*, 2023, www.devex.com/organizations/ministry-of-primary-and-mass-education-bangladesh-127296

¹⁴ Bangladesh is making a serious attempt to improve its schools, *The Economist*, 2021, www.economist.com/asia/2021/11/13/bangladesh-is-making-a-serious-attempt-to-improve-its-schools

MOE's Education Sector Plan (ESP) 2021/21-2024/25 sets out the country's medium-term objectives for access and quality within the education sector.¹⁵ These include:

- Increasing the net enrolment ratio in primary education from 98 per cent in 2019 to 100 per cent by 2025.
- Increasing completion rates for secondary education to 80 per cent by 2025.
- Increasing the percentage of schools with manageable class sizes of less than 30 students per class at the secondary education level by 50 per cent by 2025.
- Increasing the gross enrolment ratio of the 18-24 age group at the tertiary level from 18 per cent in 2020 to 25 per cent in 2025.
- Increasing the share of enrolment in science, technology and engineering at the tertiary level from 30 per cent to 50 per cent.
- Increasing the net enrolment ratio in higher secondary education (grades 11-12) – from 26 per cent of all students, 27 per cent of boys and 26 per cent of girls in 2019 to 50 per cent for all categories in 2025.
- Increase the number of technical-vocational stream institutions at the secondary level from 10,452 in 2019 to 16,310 in 2025.

¹⁵ Education Sector Plan for Bangladesh 2020/21-2024/25, *Ministry of Education*, 2020, www.planipolis.iiep.unesco.org/en/2020/education-sector-plan-esp-bangladesh-fiscal-years-202021-202425-7052

4 Domestic Education Environment

4.1 Overview

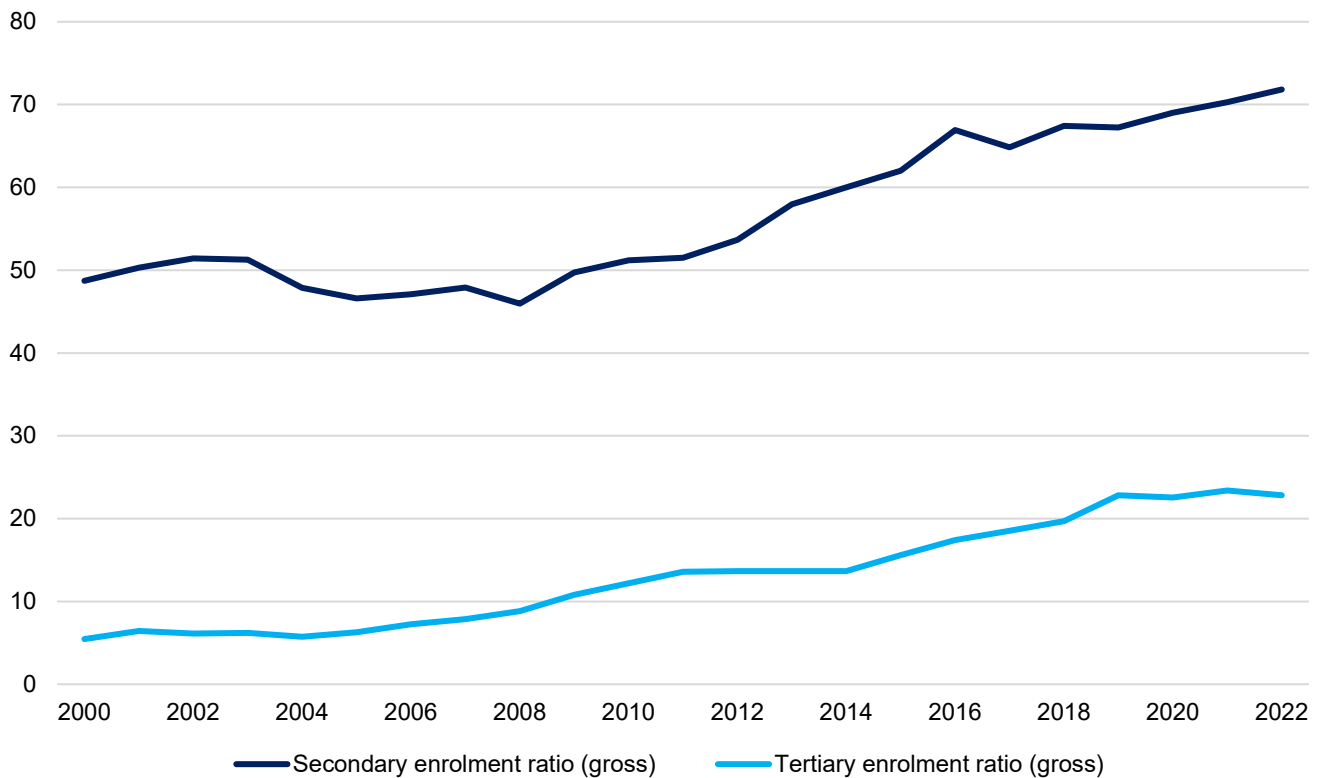
Over the past decade, Bangladesh has made strong progress in expanding access to education, particularly at the primary level. However, the number of out-of-school children remains a concern, particularly at the secondary education level. A 2020 report, jointly produced by the Bangladesh Bureau of Statistics and UNICEF, estimated that Bangladesh has over 6.5m out-of-school children, with total out-of-school rates rising from six per cent at the primary level to 31 per cent at the upper secondary level. Furthermore, wealth-driven disparities with regards to education attainment are stark, with children in the lowest wealth quintile having out-of-school rates of 9 per cent, 19 per cent, and 45 per cent at the primary, lower secondary and upper secondary levels. By contrast, the wealthiest quintile's out-of-school rates are just 4 per cent, 7 per cent and 19 per cent. Gender disparities are also stark, with males experiencing higher out-of-school rates than females at every level of education.¹⁶

However, despite the high out-of-school rates at the secondary education level, significant progress has been made in improving access to secondary education in Bangladesh over recent decades. In 2022, the gross secondary enrolment ratio stood at 72 per cent, up from 54 per cent a decade earlier and 49 per cent in 2000. Meanwhile, at the tertiary level, the gross enrolment ratio currently stands at 23 per cent, up from 14 per cent in 2012 and just 5 per cent in 2000. But despite strong progress in enrolment rates over the last decade, quality of education remains a significant concern and many children who attend school struggle to acquire basic academic skills. According to UNICEF, less than a third of children aged 3-5 are on track to meet basic literacy and numeracy goals, while only 43 per cent of 10-year-old students in Bangladesh were proficient in reading before the COVID-19 pandemic, and only 25 per cent of secondary school graduates attained basic competencies. Barriers to accessible and quality education were further exacerbated by the pandemic as children in Bangladesh faced one of the longest school closures in the world.¹⁷

¹⁶ Bangladesh education factsheet, BBS & UNICEF, 2023, www.data.unicef.org/wp-content/uploads/2021/05/Bangladesh-Education-Fact-Sheets_V7.pdf

¹⁷ Education in Bangladesh, UNICEF, 2023, www.unicef.org/bangladesh/en/education

Figure 4: Bangladesh secondary and tertiary enrolment ratios



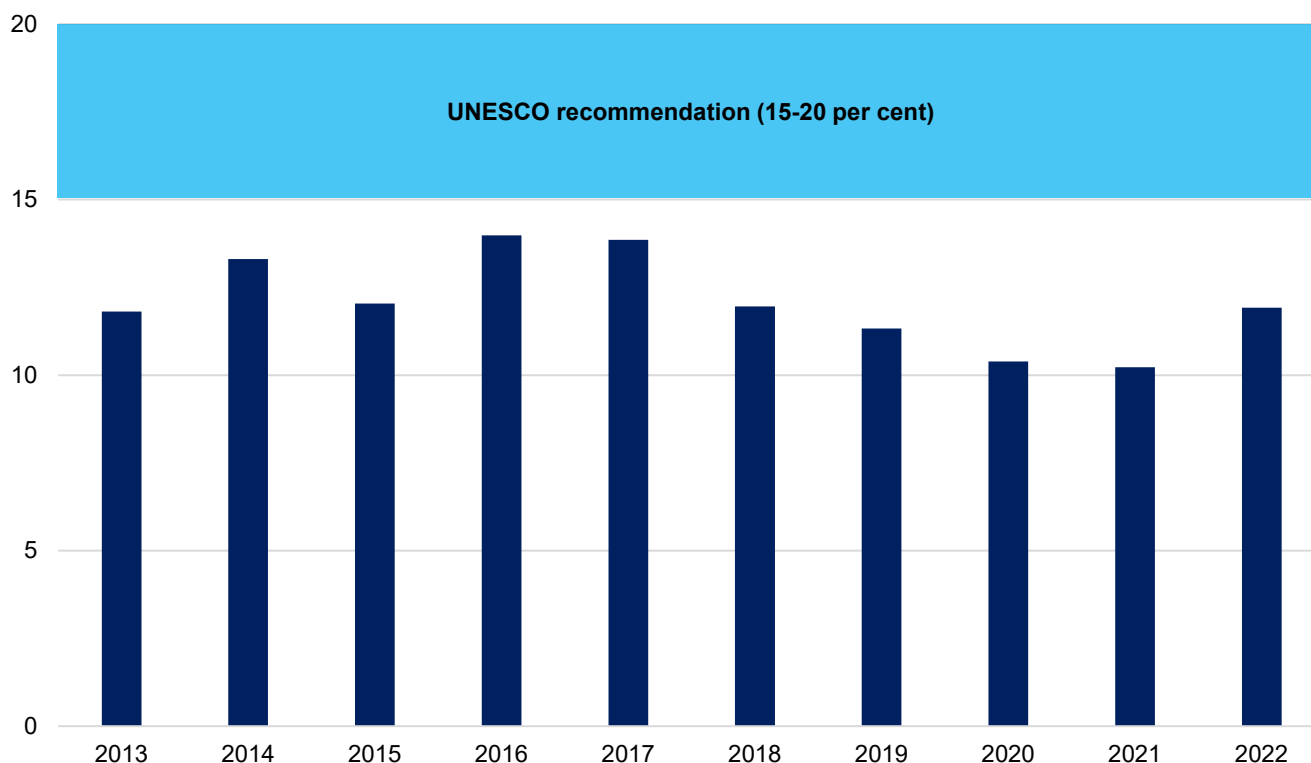
Source: World Bank

In its Education 2030 Framework for Action, UNESCO recommends that governments should allocate at least 15-20 per cent of public expenditure to education.¹⁸ Looking back over the last decade, Bangladesh has struggled to reach this level of expenditure, coming closest in 2016 and 2017 when government expenditure on education reached around 14 per cent of total government spending. Furthermore, education spending as a share of total GDP has remained around the 2 per cent level over the last decade, the second lowest level in South Asia, and lower than most other countries at a similar level of development.¹⁹

¹⁸ Education 2030 Framework for Action, UNESCO, 2016, www.unesdoc.unesco.org/ark:/48223/pf0000245656

¹⁹ Bangladesh: Ensuring Education for all Bangladeshis, World Bank, 2016, www.worldbank.org/en/results/2016/10/07/ensuring-education-for-all-bangladeshis

Figure 5: Bangladesh government expenditure on education (per cent total government expenditure)



Source: World Bank

The education system in Bangladesh is built around four key stages: pre-primary, primary, secondary, and tertiary education. Prior to 2011, the school system in Bangladesh consisted of a five-year primary cycle, followed by a seven-year secondary cycle. As part of its 2010 National Education Policy, the MOE announced that it would change the schooling system to consist of an eight-year primary cycle (ages 6-13), followed by a four-year secondary cycle (ages 14-17).²⁰ This change took effect in 2011. Primary and secondary education are both compulsory, though universal participation has remained more an ideal than a reality.²¹

Education in Bangladesh is centrally governed by the MOE in Dhaka. The MOE oversees a variety of agencies, including the Directorate of Secondary and Higher Education (DSHE), responsible for secondary and higher education, the Directorate of Technical Education (DTE), and the National Curriculum and Textbook Board (NCTB). In addition, the Ministry of Primary and Mass Education (MOPME) is a separate government ministry responsible for primary education and non-formal education programmes. Directorate of Primary Education (DPE) is the implementation body under MOPME. Education is administered at the regional level in the eight administrative regions of Bangladesh. All eight of these regions have their own Boards of Intermediate and Secondary Education (BISE), which develop, organise, and supervise the Secondary School Certificate (SSC) and Higher Secondary Certificate (HSC) examinations. There is a separate

²⁰ National education policy 2010, Ministry of Education, 2010, www.reliefweb.int/report/bangladesh/national-education-policy-2010-enbn

²¹ Education of Bangladesh, Britannica, 2023, www.britannica.com/place/Bangladesh/Bangladesh-since-independence

nationwide board for religious Muslim schools, the Madrasah Education Board, as well as a Technical Education Board that develops curricula and administers graduation examinations in technical and vocational education.

The main oversight and quality assurance body in higher education is the University Grants Commission (UGC). The UGC is responsible for disbursing government funds to public universities in exchange for their compliance with set quality criteria. In addition, the UGC acts as a coordinating body between universities and is tasked with monitoring and regulating private universities. Furthermore, in 2017, Bangladesh's parliament passed the Accreditation Council Act to establish an additional quality assurance body in higher education.²² Bangladesh Accreditation Council (BAC) is now operational and is responsible for the accreditation of HEIs and educational programmes by ensuring the quality of higher education through the implementation of the National Qualifications Framework. Specifically, BAC determines the standards of HEIs and educational programmes in Bangladesh in collaboration with the international quality assurance network, with the aim of increasing international acceptance of higher education in Bangladesh.²³

Over the last decade, due to a lack of capacity in state-funded education institutions, there has been a growing role for the private sector in the delivery of education in Bangladesh. UNESCO's 2022 Global Education and Monitoring Report investigated the role of private institutions in South Asia and found that a quarter of primary enrolments, and almost all secondary enrolments, are in private institutions. At 94 per cent, Bangladesh has the second highest rate of private secondary education enrolment globally, according to the report. Furthermore, the report detailed how a lack of state-sponsored education has created a financial burden for families in Bangladesh, with households accounting for 71 per cent of total education spending, one of the highest rates in the world.²⁴

4.2 Early years, primary, secondary

Early childhood education between the ages of three and five has historically been given little attention in Bangladesh and is not mandatory. However, participation in pre-primary education has improved substantially in recent years, with the gross enrolment rate increasing from 25 per cent in 2011 to 37 per cent in 2021. The number of institutions, both private and public, offering early childhood education has also expanded rapidly during this period, with public provision accounting for less than half of all enrolments. However, despite increased participation over the last decade, participation in pre-primary education in Bangladesh remains well below that of most of its South Asia neighbours, including India, Nepal and Pakistan. Furthermore, there are notable disparities in access to early childhood education across socioeconomic groups and geographic regions, with children from richer families and/or urban areas much more likely to attend pre-school than those from poorer families and/or rural areas.²⁵

²² Education in Bangladesh, *World Education News & Reviews*, 2019, www.wenr.wes.org/2019/08/education-in-bangladesh

²³ About Bangladesh Accreditation Council, *Bangladesh Accreditation Council*, 2023, www.bac.gov.bd/

²⁴ Global Education Monitoring Report 2022, *UNESCO*, 2022, www.unesdoc.unesco.org/ark:/48223/pf0000383550.locale=en

²⁵ The landscape of early childhood education in Bangladesh, *World Bank*, 2020, www.documents1.worldbank.org/curated/en/720311583471084983/pdf/The-Landscape-of-Early-Childhood-Education-in-Bangladesh.pdf

In the ESP, the MOE emphasised the importance of expanding access to early childhood education. Government-funded primary schools are already required to operate a pre-primary class for children aged five, but government provision of early childhood education for children under the age of five is still lacking. In the ESP, the MOE has set a target enrolment rate of over 20 per cent of four-year-olds in ‘appropriate pre-primary education classes’ by 2025, up from none in 2020.²⁶ Development of early childhood education will be an essential part of Bangladesh’s human capital development in the coming years, giving children a solid foundation of education prior to entering primary school.

Compulsory education in Bangladesh begins at the age of six. The academic calendar years for both primary and secondary school children run from January to December. School children attend classes for six days a week (Saturday-Thursday). The main language of instruction in the school system is Bangla. Primary school lasts eight years (grades 1–8) and is followed by two years of lower secondary school (grades 9-10) and two years of higher secondary school (grades 11-12). According to UNESCO, in 2022 there were 17.2m students enrolled in primary education in Bangladesh, with 16.1m students enrolled in secondary education.²⁷

In primary school, the curriculum typically includes Bangla, Bangladesh studies, English, mathematics, moral science, the social environment, and the natural environment as compulsory subjects. After grade 6, students can also partake in a number of elective subjects. Examination boards of the individual Bangladeshi divisions administer external exams in seven subjects to students who have completed grade 8. Upon successful completion of grade 8 and passing the final exam, pupils are awarded the Junior School Examination Certificate.

Admission to secondary education requires students to have achieved a minimum grade point average in the Junior School Examination Certificate. Students can study in either a general stream, a religious stream (known as a Madrasah), or a technical stream. Each stream offers options for further curricular specialisations. General programmes, for instance, are offered in business, humanities, and science tracks. All programmes have a general academic core curriculum that includes Bangla, Bangladesh studies, English, mathematics, and information technology.

The Boards of Intermediate and Secondary Education administer two external examinations at the end of each phase (grades 10 and 12). In the general and technical education streams, they take the SSC examination and the HSC examination. A passing score on the SSC exam is the minimum requirement to progress into higher secondary education, though admission to the higher secondary phase is competitive, and students wanting to gain admission to high-quality higher secondary education institutions require high grades. Spots in these institutions are highly sought-after by Bangladeshi students, as they improve students’ chances of gaining a seat at university. The final HSC exam includes Bangla, English, and information and computer technology as compulsory subjects, in addition to one elective.

While over 90 per cent of all secondary enrolments are at private institutions, the facilities, equipment and teaching materials in these schools are provided in part by the government. Unlike

²⁶ Education sector plan for Bangladesh, *Global partnership*, 2020, www.globalpartnership.org/content/education-sector-plan-2020-2025-bangladesh

²⁷ Enrolment by level of education, *UNESCO*, 2022, www.data.uis.unesco.org/

in primary education, however, pupils in secondary schools are required to pay tuition fees, which have been rising sharply in recent years. There are additional fees for examinations, and many parents also pay substantial sums for private tutoring.

In addition to Bangladeshi schools, there are a growing number of international schools that teach foreign curricula, with the British General Certificate of Education curriculum being the most popular. However, the level of tuition fees at these institutions mean that they are almost only accessible to wealthy, urban families. There are also some 20,000 Madrasahs (Muslim schools) in Bangladesh that provide education to millions of students across different education levels.²⁸

4.3 Technical & vocational education and training

In Bangladesh, the TVET system in principle has the task of equipping up to 2m young people seeking to enter the world of work every year with market-responsive skills for gainful employment or self-employment. Formal TVET in Bangladesh starts from the secondary level and continues at the tertiary education level including in universities.²⁹

The Directorate of Technical Education (DTE) is in charge of TVET implementation, branding TVET and providing training through its institutions. However, TVET provision in Bangladesh has historically suffered from a lack of coordination. The introduction of the National Skills Development Policy in 2011 and the establishment of the National Skills Development Authority (NSDA) in 2018 are expected to contribute to developing a framework for integrated planning and management of TVET in the country.

Bangladesh Technical Education Board (BTEB) data indicates that TVET enrolment in the institutions under BTEB has reached just over 17 per cent of the total secondary and post-secondary non-tertiary level enrolment in 2019. The TVET Development Action Plan of the government set targets to have 25 per cent of students under TVET by 2025 and 30 per cent by 2030, with TVET seen as an effective means through which to reduce youth unemployment and to enable the country to take advantage of its demographic dividend. However, as noted in the ESP, the success of TVET depends on its responsiveness and flexibility in relation to market needs and demands at the local level and TVET management and governance structures need to become more responsive in this respect. Furthermore, the ESP notes that attention is also needed in strengthening the TVET and skills development curriculum at secondary and tertiary levels, as well as for non-formal education, aligning it with the National Technical and Vocational Qualification Framework and the vision set by the Industry Skills Councils (ISCs), considering the future needs of the job market at home and abroad. In addition, the reputation of the TVET stream in Bangladesh remains a major challenge which may hinder the achievement of the country's ambitious TVET enrolment targets. As noted in the Eighth Five Year Plan, demonstrating a clear path to the students and their families from TVET education to reputable and gainful employment will be one important mode of improving the social acceptance of TVET within the country.

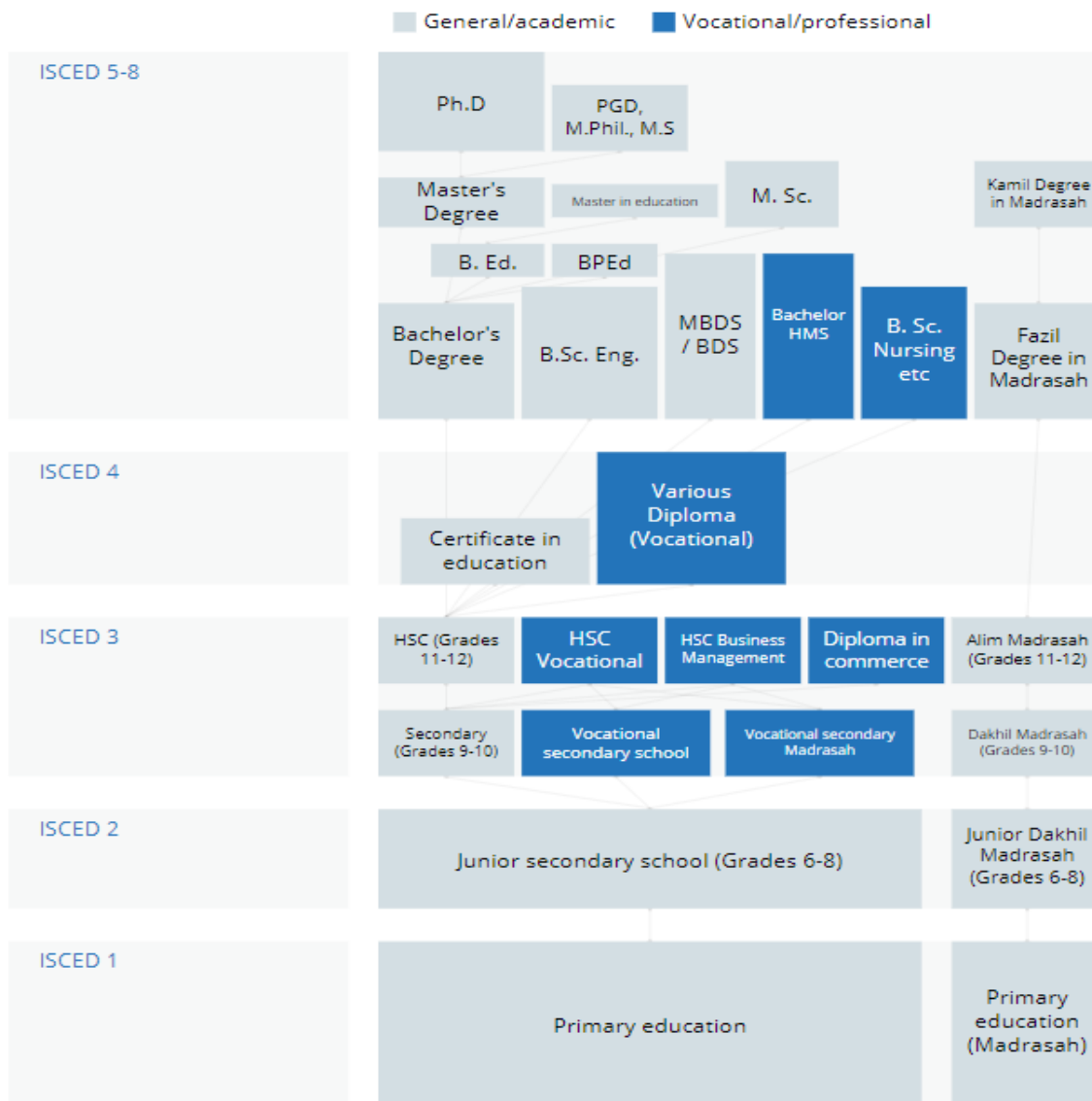
²⁸ Education in Bangladesh, *World Education News & Reviews*, 2019, www.wenr.wes.org/2019/08/education-in-bangladesh

²⁹ Education sector plan for Bangladesh, Global partnership, 2020, www.globalpartnership.org/content/education-sector-plan-2020-2025-bangladesh

Other key objectives for the TVET sector as set out in the ESP include:

- Increased participation in demand driven TVET and skills development programmes which are flexible, which link up with industry specific skills needs and facilitate smooth school to work transition.
- Significant improvement in measurable learning outcomes in foundational skills and trade-based technical skills as identified jointly with employers, achieved through efficient training competency-based curricula, appropriate materials and equipment, practical classes, and ICT facilities.
- Progressive decentralisation of functions with planning, management and financial authority at the institutional levels for ensuring the intended results.
- Strengthened institutional capacity and enhanced coordination mechanisms to ensure continuity of education and training during and following natural calamities and other emergency situations, with particular attention to issues of short and longer term duration raised by the COVID-19 pandemic though usual distance education modes are more difficult to implement in TVET.

Figure 6: Structure of the formal education and training system in Bangladesh



Source: UNESCO (School reference year: 2021)

4.4 Higher education

According to data from UNESCO, tertiary enrolments in Bangladesh stood at 3.8m in 2022, which represents very strong growth from just 0.7m in 2000 and is evidence of the significant increase in participation over the last two decades. However, despite this growth in participation levels, participation rates remain relatively low in Bangladesh, with the gross tertiary enrolment rate at just 23 per cent in 2022. As such, while significant progress has been made, there is still considerable scope for further improvement, with for example, the tertiary enrolment ratio in neighbouring India at 27 per cent in 2020-21, despite its GDP per capita being lower than in Bangladesh.

Demand for high-quality higher education in Bangladesh vastly outstrips supply, with seats at the sought after public universities scarce. For example, in 2023, almost 1.1m students passed their HSC exams, with the number of available seats for new students at public universities much lower at around 50,000, meaning that competition is fierce.³⁰ Admission criteria differ by institution and faculty, but entrance examinations are a common requirement at competitive institutions, in addition to minimum scores in the HSC exams. There may also be minimum grade cut-offs in specific subjects (such as mathematics for science programmes). Admission into private universities tends to be less difficult than into the highly selective public universities, but private universities offer only a limited range of degree programmes and are often prohibitively expensive.

As of 2019, there were around 3,200 HEIs recognised by Bangladesh's MOE. The majority of these were colleges affiliated with Bangladesh's National University (NU), which is the country's largest higher education network. NU was founded in 1992 with the goal of expanding access to higher education and as of 2019, its network contained 2,300 colleges, the majority of which were privately run. NU may grant affiliation to colleges if they have been in operation for at least three years and satisfy certain conditions, such as adequate facilities and teaching staff. The university prescribes the admission requirements, programme curricula, and criteria for teacher recruitment. It conducts examinations and awards the final degrees.

Aside from NU, there are an additional 55 public universities, as well as 114 private universities, which have been approved by the UGC.^{31,32} Most public universities are multi-faculty universities offering a broad range of study programmes, but there are also several specialised universities in fields like agriculture, healthcare, and medicine. Other public HEIs include the Bangladesh Military Academy and the National Defense College.

Given the rapid growth of Bangladesh's higher education system over the last two decades, quality assurance has become an increasingly pressing issue in recent years. The UGC is responsible for the allocation of funds to public universities, as well as the oversight, regulation, and quality assurance of both public and private universities in Bangladesh. As part of its work on quality assurance, Institutional Quality Assurance Cells (IQACs) at public and private universities that enroll more than 1,000 students were introduced in recent years. IQACs are internal bodies tasked with promoting and monitoring quality in all aspects of university operations, including

³⁰ HSC results 2023, *TBS News*, 2023, www.tbsnews.net/bangladesh/education/hsc-results-2023-girls-continue-lead-race-746514

³¹ List of public universities, *UGC Bangladesh*, 2023, www.ugc-universities.gov.bd/

³² List of private universities, *UGC Bangladesh*, 2023, www.ugc-universities.gov.bd/private-universities

teaching, learning, research, and infrastructure. As a follow-up to this project, in 2021 the World Bank approved a US\$191m credit to Bangladesh and a US\$18 million grant to Afghanistan to help the countries strengthen their higher education sectors and respond better to the pandemic. The Higher Education Acceleration Transformation Project - the first World Bank-supported regional education project in South Asia - will support regional collaboration in the higher education sector, including student mobility through equivalence programs, credit transfer schemes, and university twinning arrangements within the region. It will also help more women access quality higher education, which will result in increased female labor force participation.³³

³³ World Bank helps improve higher education in Afghanistan and Bangladesh, *Relief Web*, 2021, www.reliefweb.int/report/afghanistan/world-bank-helps-improve-higher-education-afghanistan-and-bangladesh

5 International Education

5.1 Student mobility

According to estimates from UNESCO, almost 53,000 students from Bangladesh travelled abroad to study at the higher education level in 2021. This makes the Bangladeshi outbound student market comparable in size to other emerging economies such as Colombia, Egypt and Malaysia, but still considerably smaller than other South Asian markets including India (508,000), Nepal (89,000) and Pakistan (72,000). Outbound student numbers from Bangladesh peaked at around 62,000 in 2016, before falling to 44,000 by 2019. However, growth resumed in 2020 and 2021, with 2021 levels now around 15 per cent below previous peak levels.

Historically, Malaysia and the US have been the most popular study destinations for outbound international students from Bangladesh. Malaysia's prominence is primarily due to its affordable tuition fees and living costs compared to other destinations, as well as the visa application process being relatively straightforward for prospective students.³⁴ However, Bangladeshi student numbers in Malaysia have slowed in recent years because of pandemic-related restrictions, with other destinations including the UK benefiting.

Looking at the UK's recruitment of Bangladeshi international students, after peaking at just over 5,000 in the 2013/14 academic year, student numbers fell consistently for several years thereafter, declining to just 2,700 in 2018/19. This sharp decline came against the backdrop of strong growth in total outbound student numbers from Bangladesh over the same period. As such, 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.

However, there has been a significant reversal in fortunes in this market over recent years, with growth resuming in the 2019/20 academic year, before surging strongly in 2020/21 to over 6,000 students and further in 2021/22, to just over 12,000 students. The sharp increase in the UK's popularity as a study destination for Bangladeshi students is attributed to the UK's introduction of the Graduate Route in summer 2021, a new post-study work visa that allows eligible students two years (or three years for PHD students) to stay after they graduate to work or look for work in the UK.³⁵ Given the extremely strong growth in Bangladeshi international students in the UK, in

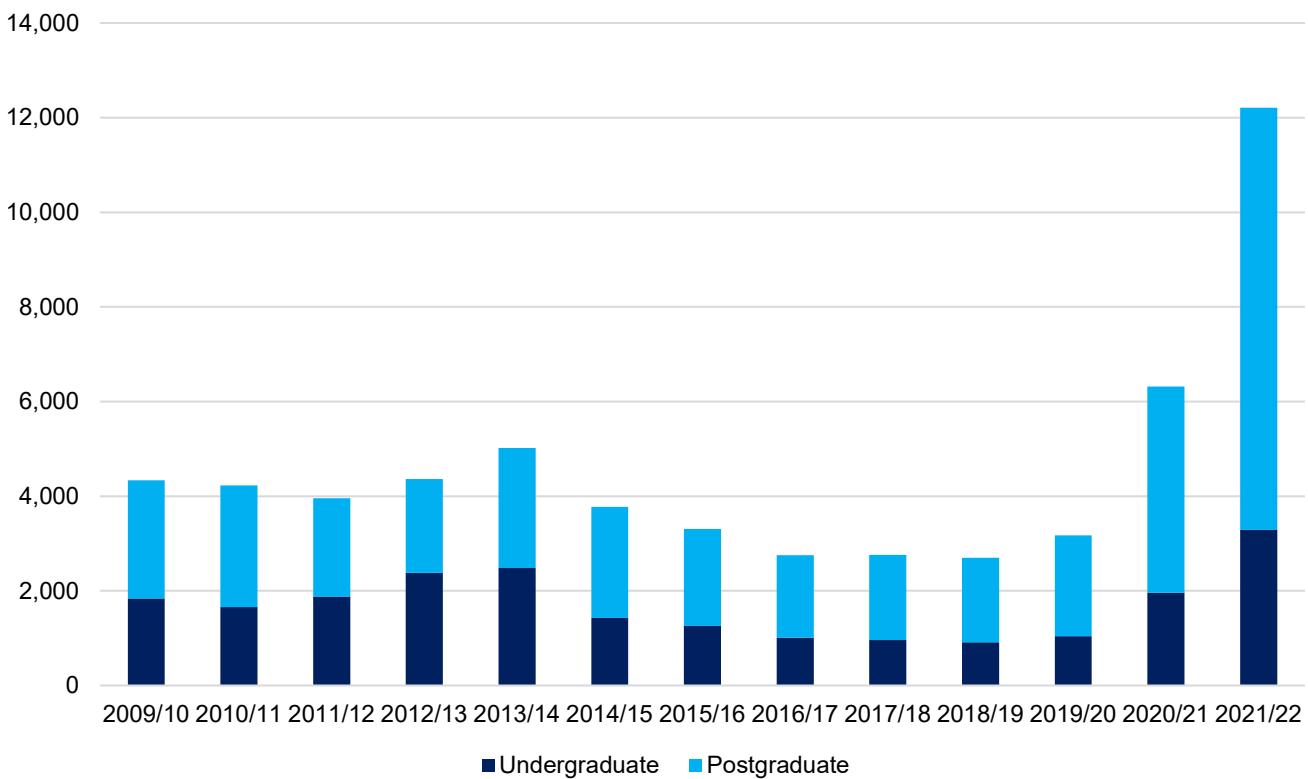
³⁴ Reasons to study in Malaysia from Bangladesh, *Eduvisors*, 2023, www.eduvisors.com.bd/study-abroad-bangladesh/study-in-malaysia/#:~:text=Compared%20to%20other%20study%20Dabroad,attractive%20option%20for%20Bangladeshi%20students
The factors driving growth in Bangladeshi outbound, *ICEF monitor*, 2023, www.monitor.icef.com/2018/03/factors-driving-growth-bangladeshi-outbound/

³⁵ On International Students Day, UK Immigration minister says to Pakistani scholars: Choose the UK, *Gov.uk*, 2020, www.gov.uk/government/news/on-international-students-day-uk-immigration-minister-says-to-pakistani-scholars-choose-the-uk#:~:text=In%20response%20to%20the%20Covid,Pakistani%20students%20could%20still%20travel.

2021/22 it became the UK's 12th largest source market for international students globally. The majority of the growth in student numbers from Bangladesh over the last couple of years has come at the postgraduate level. In particular, demand for one-year master's degrees offered by UK universities has increased significantly, particularly from cost conscious international students, given that most full-time UK masters programmes take half the time to complete, compared with similar postgraduate programmes in many rival study destinations.

Consistent with the recent surge in Bangladeshi international student numbers, UK study visa issuance to Bangladeshi nationals has grown strongly over recent years. In 2021, visa issuance to Bangladeshi students was more than four times higher than the pre-pandemic level. Furthermore, study visa issuance to Bangladeshi nationals increased again by over 70 per cent in 2022 compared to 2021, reaching just over 15,000. This made Bangladesh the fifth largest sending country to the UK in terms of sponsored study visa issuance, only behind India, China, Nigeria and Pakistan and suggests that the strong growth seen in Bangladeshi international student numbers in the UK continued in the 2022/23 academic year. However, visa issuance data for January to September 2023 shows that UK study visa issuance to Bangladesh fell by 36 per cent compared to the same period in 2022, which suggests that the extremely strong growth in Bangladeshi international students in the UK over recent years may have halted in the 2023/24 academic year.

Figure 7: Bangladeshi students in HE programmes in the UK

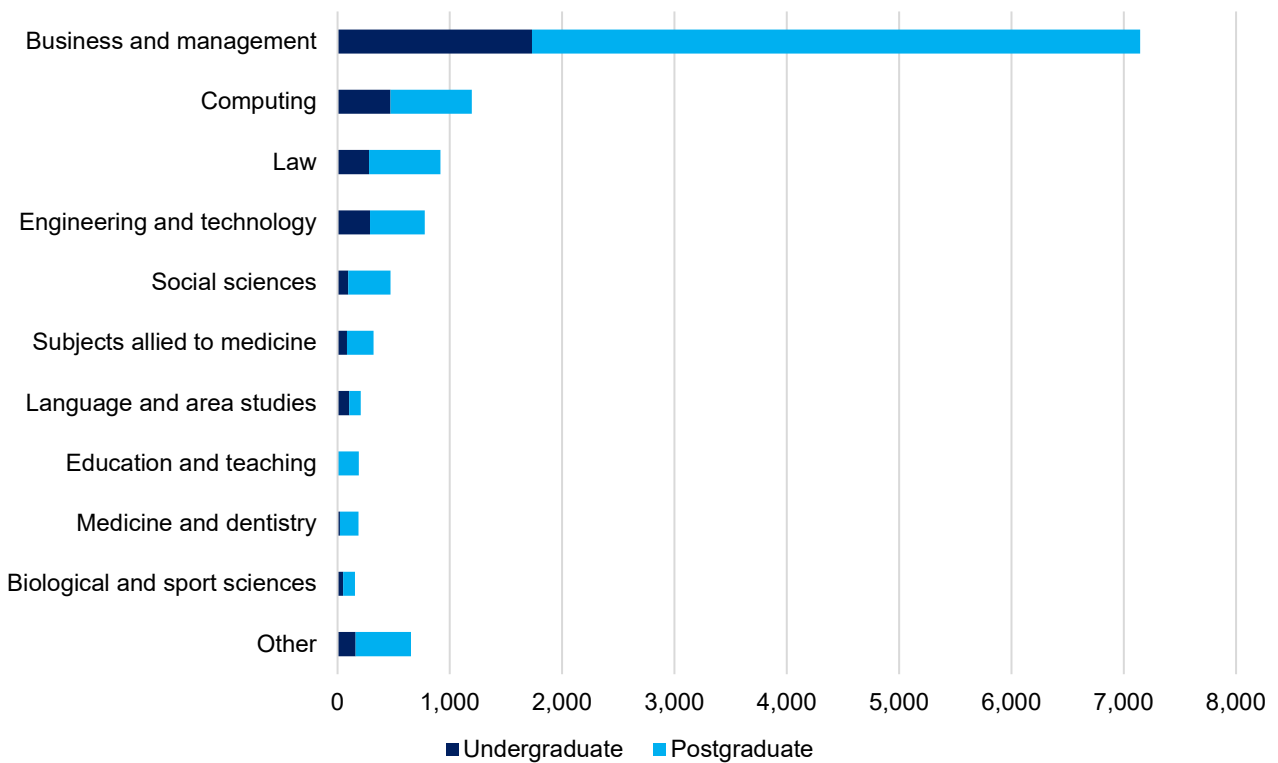


Source: HESA

Regarding subject areas, business and management is by far the most popular subject area with both undergraduates and postgraduates, with a total of 7,145 enrolments in 2021/22. This was around six times more than the second most popular subject, computing, which had 1,195 enrolments. The next most popular subject choices were law (915), engineering and technology (775) and social sciences (470).

Meanwhile, over the last decade, Russell Group institutions have accounted for around 17 per cent of all Bangladeshi students enrolled at UK HEIs on average and this had risen to a record high of 25 per cent in the 2018/19 academic year. However, this share fell to 12 per cent in 2020/21 and further to just 7 per cent in 2021/22. This was the lowest share since HESA records began in 2002/03 and shows that the recent surge in Bangladeshi enrolments at UK universities has been primarily driven by enrolment growth at non-Russell Group institutions.

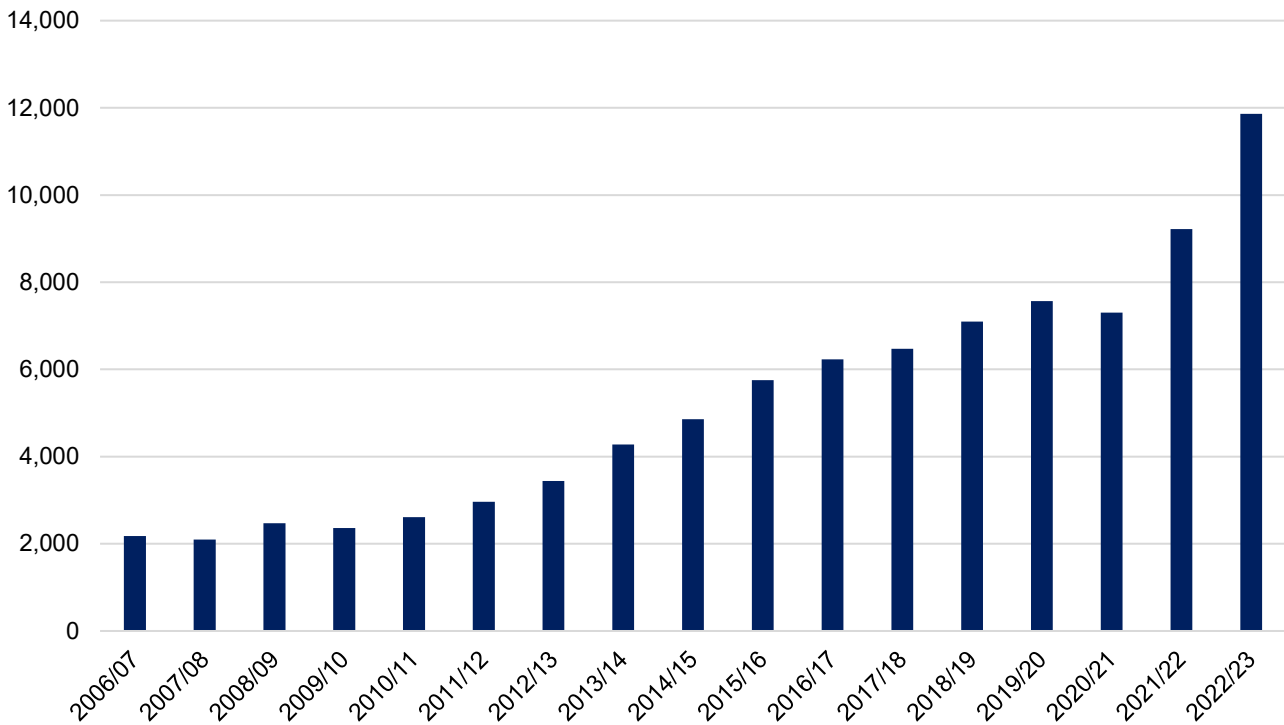
Figure 8: Subjects studied by Bangladeshi HE students in the UK, 2021/22



Source: HESA

In terms of location, London (2,630 students) is the preferred region of study in the UK for students from Bangladesh, with around one in five students studying in the capital in 2021/22. The South East was the next most popular region with 2,265 students, followed by the East of England (1,130). At the institution level, the most popular in 2021/22 was the University of Portsmouth (1,160), followed by Ulster University (815) and the University of Greenwich (810).

Figure 9: Bangladeshi HE enrolments in the US

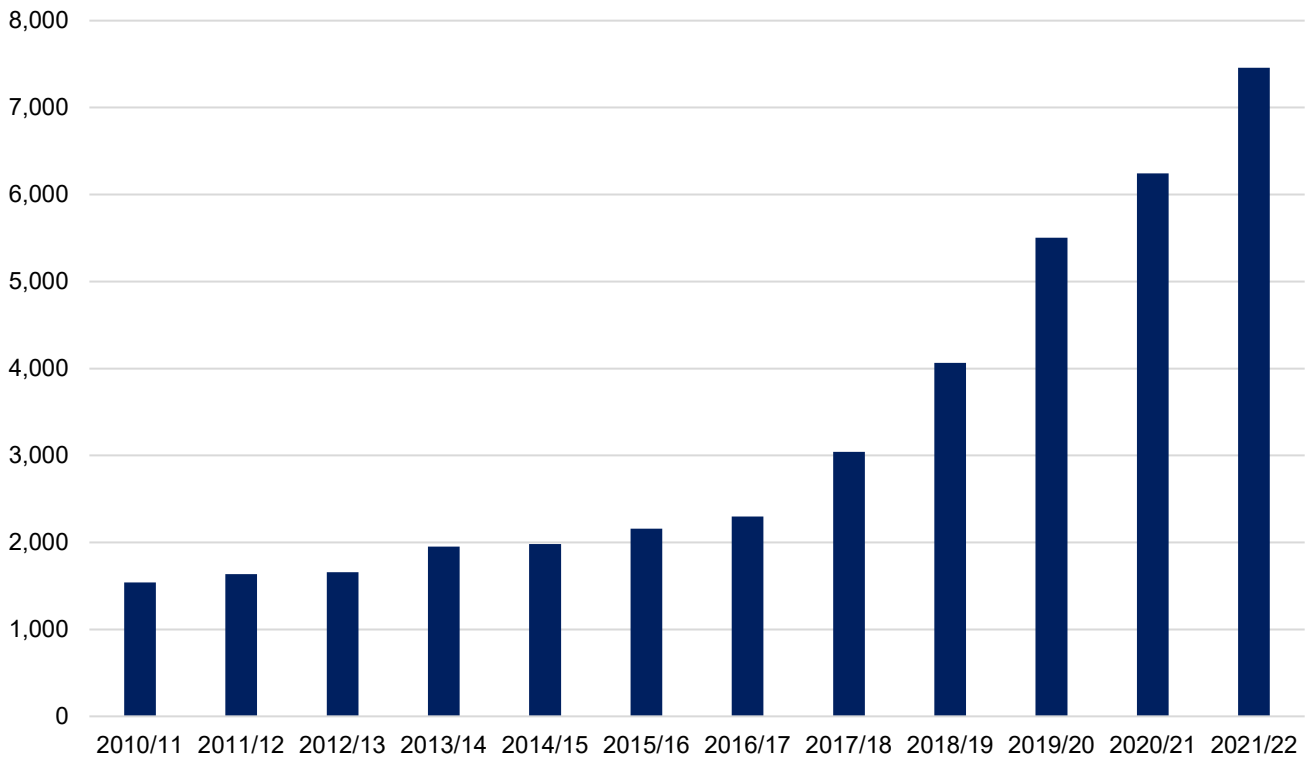


Source: IIE (Note: OPT students excluded).

Over the last decade Bangladeshi student numbers in the US have been on a strong and consistent upward trajectory. By 2019/20, student numbers had reached almost 7,600, which was more than three times higher than recorded a decade earlier. However, student numbers fell back by around 3 per cent in the 2020/21 academic year to 7,300, as international travel restrictions weighed on student mobility prospects. The sustained period of growth seen in the years prior to the pandemic resumed again in 2021/22, with growth of 26 per cent and student numbers surpassing pre-pandemic levels, reaching a new peak of more than 9,200. Strong growth continued in the 2022/23 academic year, with further growth of 29 per cent, with student numbers almost reaching the 12,000 mark.

Looking ahead, the Biden administration is aiming to provide a more accommodative environment for inbound international students than under President Trump, through reforms to the immigration system and more flexible visas for international students which may pave the way for continued strong growth in Bangladeshi international student flows to the US in the years ahead.

Figure 10: Bangladeshi HE enrolments in Canada

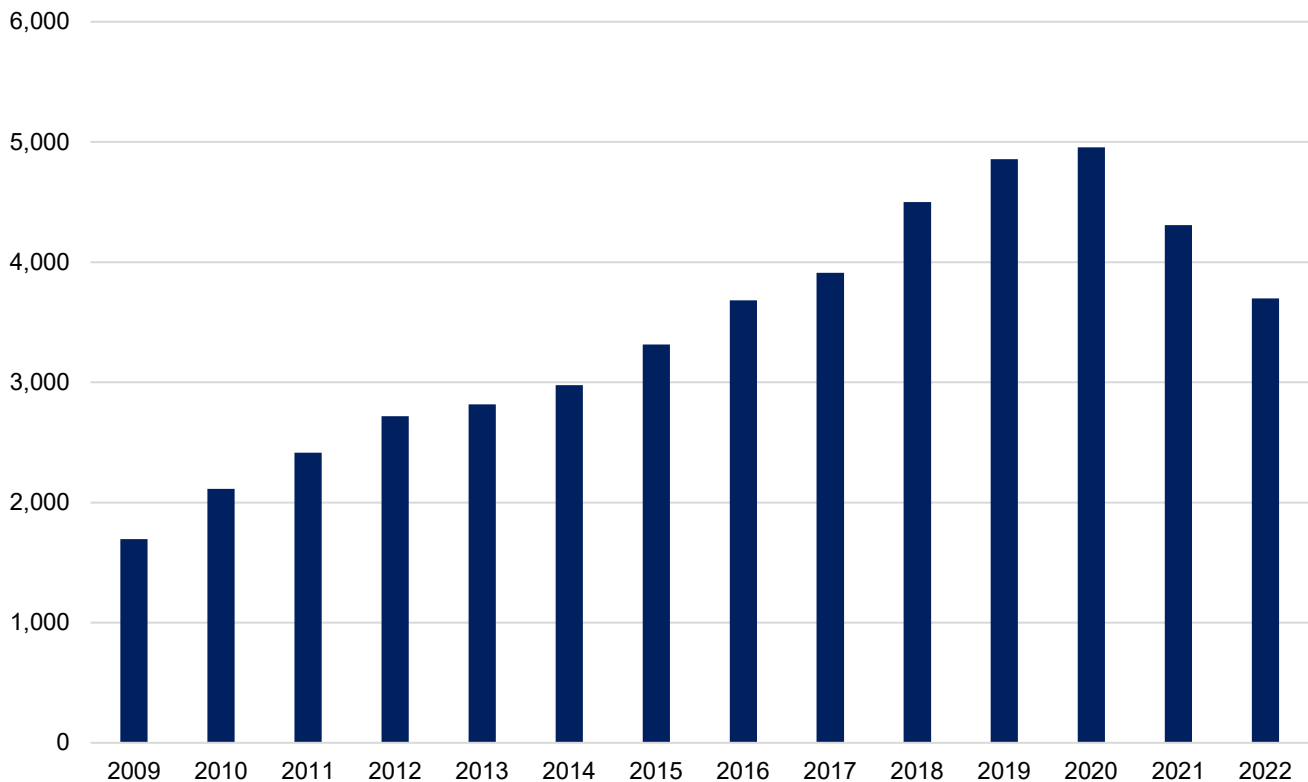


Source: StatCan

Similar to the trend seen in the US, Bangladeshi international student enrolment in Canada has grown very strongly over recent years, with Canada now emerging as a leading destination market for Bangladeshi students. Student numbers have increased from around 1,500 in 2010/11 to just almost 7,500 in 2021/22, representing an almost five times increase in student numbers over the period.

Canada's success in growing its student numbers from Bangladesh is consistent with its growing prominence as a leading study destination for international students from across the world more generally, with the government having made a concerted effort to attract more international higher education students over recent years through committing significant funds each year to aid its branding and marketing efforts. In addition, Canada is often seen as a more affordable study destination than the US and the major European destinations, while its Post-Graduation Work Permit (PGWP) Program allows students who have graduated from eligible institutions to obtain an open work permit to gain valuable Canadian work experience, which can help graduates qualify for permanent residence in Canada.

Figure 11: Bangladeshi HE enrolments in Australia



Source: AusTrade

After a period of strong growth throughout the 2010s, Australia has also become a major destination for Bangladeshi international students. Bangladeshi student numbers in Australia grew from around 1,700 in 2009 to almost 4,900 ten years later in 2019. Growth in student numbers slowed but remained positive in 2020, before falling significantly in 2021 and 2022 as Covid-related travel restrictions and highly restrictive border control and international travel policies implemented by the Australian government halted the inflow of international students. By 2022, Bangladeshi student numbers in Australia had fallen to just under 3,700, comparable to the levels seen back in 2016. To counteract this, in late 2021, the Australian government temporarily extended work rights for international students and is offering other incentives such as visa application fee refunds to entice international students back, which could help facilitate a return to the upward trajectory of student flows from Bangladesh to Australia in the years ahead.

Detailed information concerning inbound international students in Bangladesh is not widely available. However, according to UNESCO estimates, the country hosted a relatively low 2,200 inbound international students in 2022. According to the UGC the number of international students has fluctuated between around 2,000 and 2,500 for the last decade, with the most recent figures showing around 800 international students were enrolled in public universities, with around 1,400 enrolled in private universities.³⁶

³⁶ Could Bangladesh's plans to attract more foreign students backfire?, *Dhaka Tribune*, 2023, www.dhakatribune.com/bangladesh/education/201201/could-bangladesh%E2%80%99s-plans-to-attract-more-foreign

5.2 Transnational education and distance learning

According to HESA, there were 2,160 Bangladeshi students enrolled on UK TNE and distance learning courses in the 2021/22 academic year, which was marginally down on the 2,200 recorded in 2020/21, but around 15 per cent up on pre-pandemic 2019/20 levels. As such, Bangladesh is a relatively small TNE and distance learning market for the UK and is considerably smaller than other South Asian markets where there are considerably more students enrolled, such as Sri Lanka (45,980), India (12,075), Nepal (10,700) and Pakistan (9,770). In 2021/22, just over 80 per cent of UK TNE provision in Bangladesh was via distance learning, with around two thirds of provision taking place at bachelor's level.

In 2014, the Bangladesh MOE formulated the Cross Border Higher Education rule, allowing foreign universities, branch campuses or study centres to operate academic activities in the country. Before this, 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 MOE has blocked approval of several applications, including applications from both Australia and the UK. Private university owners have routinely opposed government moves to allow foreign universities to open branch campuses in Bangladesh, and their lobbying appears to have been influential. In May 2018, UGC issued a notice stating that it had not permitted any foreign university to set up branch campuses or study centres in Bangladesh, warning students against admissions to entities that claim to belong to this category.

However, more positively, with the aim of providing international education in Bangladesh at an affordable price for students, Universal College Bangladesh (UCB), the first MOE-approved international education provider in the country, has partnered exclusively with the University of London (UoL) for the launch of multiple bachelor's degrees. With full curriculum and testing from the London School of Economics, the offered courses at UCB initially include BSc Business and Management, BSc Finance and BSc Accounting and Finance. In addition, UCB is the exclusive partner of Monash College, Australia, in Bangladesh. The Monash University Foundation Year (MUFY) program enables HSC, GCSE, IB and AS students to begin their Monash journey in Bangladesh, with guaranteed entry into Monash University Australia or Monash University Malaysia upon program completion. Furthermore, in 2022 the MOE approved a branch campus operated by UCSI University, Malaysia. Located in Dhaka, operations commenced in May 2023 with 24 degree and master's programmes in the fields of business, computer science, engineering, architecture, social sciences and design available to students.³⁷ As such, while TNE activity in Bangladesh has been relatively muted, there are tentative signs that activity could increase in future.³⁸

³⁷ UCSI University launches international branch campus in Bangladesh, *UCSI University*, 2023, www.ucsiuniversity.edu.my/ucsi-university-launches-international-branch-campus-bangladesh-0

³⁸ Why Bangladesh needs a branch campus, not a study centre, *University World News*, 2023, www.universityworldnews.com/post.php?story=20210618100954862

6 UK Cooperation

The British Council has developed a long-standing partnership with the UGC of Bangladesh and on 31 October 2023 signed an Operational Alliance Agreement. This partnership reinforces the two entities' mutual dedication to strengthening and elevating the higher education sector in Bangladesh. The British Council's Going Global Partnerships (GGP), launched in July 2021, aim to foster strategic, mutually beneficial, and equitable partnerships in tertiary education between the UK and other nations. In Bangladesh, under the GGP, the British Council, in collaboration with the UGC, is dedicated to enhancing the higher education sector's teaching and learning capacity, exemplified by the establishment of Centre of Excellence in Teaching and Learning (CETL) units.

In addition to this, in February 2023, the second Bangladesh-UK trade and investment dialogue was held in Dhaka. Representatives from the UK and Bangladesh governments discussed collaboration in several areas, including higher education. It was agreed that a Joint Working Group will meet regularly to enhance cooperation between the two nations. During the discussion, representatives from both sides highlighted the importance of high-quality education and agreed to further deepen and widen the scope of collaboration in the area of higher education for mutual benefit.³⁹

Bangladeshi students can benefit from several UK scholarship schemes which can provide financial support to students aspiring to study in the UK. For example, Bangladeshi students are eligible for Commonwealth Scholarships. Established in 1959, the Commonwealth Scholarship Commission (CSC) offers around 700 awards for postgraduate study and professional development at UK universities each year.⁴⁰ Furthermore, GREAT Scholarships offers 11 scholarships from UK universities, across a variety of subjects for students from Bangladesh. Each scholarship is worth a minimum of £10,000 towards tuition fees for a one-year postgraduate course. Each scholarship is jointly funded by the UK government's GREAT Britain Campaign and the British Council with participating UK HEIs.⁴¹ Bangladeshi students are also eligible to apply to the Chevening Scholarship Scheme, which is comprised mostly of one-year master's courses across various UK universities and is awarded to students with a demonstrable potential to become future leaders.⁴² A total of 22 Bangladeshi students received a Chevening scholarship in the 2022/23 academic year, which was the highest number on record. Since its inception in 1983, there have been over 330 successful Chevening scholars from Bangladesh.⁴³ Additionally, the British Council runs a Women in STEM scholarship programme in partnership with 21 UK universities, with Bangladeshi students able to apply for both master's scholarships and early academic fellowships.⁴⁴

³⁹ Bangladesh – UK trade and investment dialogue 2023, *GOV.uk*, 2023, www.gov.uk/government/news/bangladesh-uk-trade-and-investment-dialogue-2023

⁴⁰ Commonwealth Scholarships, *British Council*, September 2023, www.britishcouncil.org.bd/en/commonwealth-scholarship-and-fellowship-plan-csfp

⁴¹ Great scholarships Bangladesh, *British Council*, 2023, www.britishcouncil.org.bd/en/great-scholarships-bangladesh

⁴² Chevening in Bangladesh, *Chevening.org*, 2023, www.chevening.org/scholarship/bangladesh/

⁴³ What does it take to get a Chevening scholarship, *TBS News*, 2023, www.tbsnews.net/features/pursuit/what-does-it-take-get-chevening-scholarship-505246

⁴⁴ British Council scholarships for women in STEM, *British Council*, 2023, www.britishcouncil.org.bd/en/study-uk/scholarships-and-financial-support-0/british-council-scholarships-women-stem